Lucent Call Center’s
Little Instruction Book
for basic administration
Your Responsibility for Your System’s Security

Toll fraud is the unauthorized use of your telecommunications system by an unauthorized party, for example, persons other than your company’s employees, agents, subcontractors, or persons working on your company’s behalf. Note that there may be a risk of toll fraud associated with your telecommunications system and, if toll fraud occurs, it can result in substantial additional charges for your telecommunications services.

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Comcode 108502253, December 1999

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Lucent Technologies Business Communications Systems declares that equipment specified in this document conforms to the referenced European Union (EU) Directives and Harmonized Standards listed below:

EMC Directive89/336/EEC
Low Voltage Directive73/23/EEC

The “CE” mark affixed to the equipment means that it conforms to the above Directives.

Acknowledgment

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

Use this area to record frequently referred to pages in this book and to keep personalized notes for quick and easy access.
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Web/CD Production Ellen Heffington
Call Center Little Instruction Book
for basic administration  585-210-935

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Welcome

Why this new book?

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

We wrote this book for you!

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

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

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

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

- In this book we use the terms “switch” and “split/skill”. Other Lucent Technologies books may refer to the switch as the “PBX”, and a split/skill as a “hunt group”.

- Operational function keys, fields, and text boxes are printed in italics, for example, Enter.

- We show screens from the newest CentreVu systems and refer to the most current books. Please substitute the appropriate commands for your system and refer to the manuals you have available.

- You may see the following symbols in this book:

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

  ➡️ NOTE:
  Draws attention to information that is included in the paragraph.

  ⚠️ CAUTION:
  Calls attention to a situation that could result in harm to the software, loss of data, or a possible service interruption.
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When used in this book, these trademark and registered trademark product names are shown in italics. If the name is used in a block of text that already incorporates italics, then the appropriate symbol is included in the call-out.
Related books

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

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

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

CentreVu CMS and CentreVu Supervisor books

- CentreVu Call Center Little Instruction Book for basic administration, 585-210-935, Issue 1, Comcode 108502253
- CentreVu Call Center Little Instruction Book for advanced administration, 585-210-936, Issue 1, Comcode 108502261
- CentreVu Call Management System Release 3 Version 8 Administration, 585-210-910, Issue 1, Comcode 108501743
- CentreVu Call Management System Database Items, 585-210-939, Issue 1, Comcode 108502345
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- CentreVu Call Management System Release 3 Version 8 Maintenance and Troubleshooting, 585-210-919, Issue 1, Comcode 108501917
- CentreVu Call Management System Switch Connections and Administration, 585-25-876, Issue 2, Comcode 10850958
- CentreVu Advocate Release 8 User Guide, 585-210-927, Issue 1, 108502162
- CentreVu Supervisor Version 8 Installation and Getting Started, 585-210-928, Issue 1, 108502170
- CentreVu Supervisor Version 8 Reports, 585-210-929, Issue 1, Comcode 108502188
- CentreVu Report Designer Version 8 User Guide, 585-210-930, Issue 1, Comcode 108502196
- CentreVu Call Management System Forecast, 585-215-825, Issue 1, Comcode 107876203
- CentreVu Call Management System Custom Reports, 585-215-822, Issue 2, Comcode 108501867

CentreVu Visual Vectors books

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

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

**DEFINITY ECS call center books**

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

- *DEFINITY* Enterprise Communications Server Release 8 Guide to ACD Call Centers, 555-233-503, Issue 2, Comcode 108596354
- *DEFINITY* Enterprise Communications Server Basic Call Management System (BCMS) Operations, 555-230-706, Issue 2, Comcode 108485087
Tell us what you think!

Let us know what you like or do not like about this book. Although we cannot respond personally to all of your feedback, we promise we will read each response we receive.

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

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Call Center Little Instruction Book  
Product Documentation Group  
11900 North Pecos Street  
Denver, Colorado 80234 USA

Fax to:  
303-538-1741

Send email to:  
document@drmail.lucent.com
How to get this book on the world wide web

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

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2. Select *Information Resources*.
3. Select *ELMO*.
4. Enter your **IL** (Location ID) to access the library.
5. Enter **585-210-935** (the document number) to view the latest version of the book.
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Comcode 108502253, Issue 1, December 1999

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How to get help

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

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<th>Service</th>
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<tr>
<td>CentreVu CMS Helpline</td>
<td>1-800-242-2121</td>
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<td>...for help with feature administration, system applications, and reports</td>
<td></td>
</tr>
<tr>
<td>DEFINITY Helpline</td>
<td>1-800-225-7585</td>
</tr>
<tr>
<td>...for help with feature administration and system applications</td>
<td></td>
</tr>
<tr>
<td>Lucent Technologies National Customer Care Center Support Line</td>
<td>1-800-242-2121</td>
</tr>
<tr>
<td>...for help with maintenance and repair</td>
<td></td>
</tr>
<tr>
<td>Lucent Technologies Centers of Excellence</td>
<td></td>
</tr>
<tr>
<td>- Asia/Pacific</td>
<td>65-872-8686</td>
</tr>
<tr>
<td>- Western Europe/Middle East/South Africa</td>
<td>441-252-391-889</td>
</tr>
<tr>
<td>- Central Eastern Europe</td>
<td>361-270-5160</td>
</tr>
<tr>
<td>- Central/Latin America/Caribbean</td>
<td>1-303-538-4666</td>
</tr>
<tr>
<td>- North America</td>
<td>1-800-248-1111</td>
</tr>
</tbody>
</table>
Before you contact Lucent Technologies for support

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

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

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

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

- A call-back number (in case we need to call you later)

- The reason for your call, including any background details or history that may have contributed to your call for additional support (for example, vector changes, hardware changes, modifications to system configurations, specific reports, dates and times, and so on.)

  For BCMS Vu calls, be sure PC Anywhere is installed on the PC you’re calling about and that a modem is connected to it.

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

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

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

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

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

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

Call center reporting tools

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

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

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

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

Administering the call center

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

Accessing the CentreVu CMS

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

Logging in to CentreVu CMS

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

Using CentreVu Supervisor

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

1. Open the CentreVu Supervisor application.
2. Select Login from the Connect menu or select the Login button on the toolbar.
   The Login Information window opens.
3. From the drop-down list, select the CMS Server to which you want to log in.
4. Type your CentreVu CMS login ID in the Login ID text box, or select your login ID from the drop-down list.
5. Use the tab key to move the cursor to the Password text box.
6. Type your CentreVu CMS password in the Password text box.
   You may see the Confirm Password window. This window reports that your password has expired and must be changed. Follow the prompts and type in a new password.
7. Select OK.

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

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

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

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

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

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

**Using CentreVu Terminal Emulator**

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

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

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

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

**Using *CentreVu* Supervisor**

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

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

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

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

**Using *CentreVu* Terminal Emulator**

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

1. Use the arrow keys to highlight *Logout* on the CMS MainMenu and press *Enter.*
   
   A dialog box states “The connection has been dropped.”

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

1. Select Exit from the Profile menu
   A dialogue box opens stating, “The connection is active, exit anyway?”

2. Select Yes.

Or...

1. Click on the X in the upper-right corner of the CentreVu Terminal window.
   A dialog box states “The connection is active, exit anyway?”

2. Select Yes.
CentreVu Supervisor when you are logged in to the CentreVu CMS

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

**Toolbar**

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

**Status bar**

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

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

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

**Tip:**
You can press the F1 key from any window in CentreVu Supervisor for specific details on how to complete that window.
CentreVu Terminal Emulator when you are logged in to the CentreVu CMS

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

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

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

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

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

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

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

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

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

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

3. In the \textit{User ID} text box, type a unique \textbf{user ID} to add or modify.
   
The user ID must be three to eight lowercase, alphanumeric characters with no blanks or special characters.

4. The \textit{User name}, \textit{Room number}, and \textit{Telephone number} fields are optional.

5. In the \textit{Default printer name} text box, use the drop-down menu to select the name of the printer that is connected to the CentreVu CMS server or none if the user will print to a printer that is connected to his/her PC or the LAN.

\textbf{NOTE:}

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

6. Select a \textit{Login type}:

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

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

\textbf{Tip:}

Since the number of windows a user has open directly affects processor resources, select this number carefully.
8. In the Minimum refresh rate text box, type the number of seconds that will elapse between real-time report displays being brought up-to-date with the current switch activity.

9. In the Login ACD text box, use the drop-down menu to select the DEFINITY ECS ACD that will be the user’s default ACD upon initial log in to the CentreVu CMS server.

10. Select the button on the Toolbar or select Add from the Actions menu.

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

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

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

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

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

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

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

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

1. Select User Permissions from the Tools menu.

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

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

3. Select **OK**.

4. Complete the appropriate text boxes in the displayed window and check **Read**, **Write**, and/or **Exceptions** for each item.

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

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

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

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

Rules for selecting a valid password

The following requirements apply to password definition:

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

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

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

1. From the CentreVu CMS MainMenu, press the F3 key to select the Commands menu.
   The Commands menu displays.
2. Highlight Password and press Enter.
   The screen clears and the Enter login password prompt displays.
3. Type the current login password and press Enter.
4. Type a new password and press Enter.
5. Re-enter the new password and press Enter.

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

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

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

1. From the CentreVu Terminal Emulator, log in to the CentreVu CMS using the root login ID and password.
2. At the # prompt, type `passwd <userid>` and press Enter to prompt for a new password (where `<userid>` is the user ID of the user whose password you are replacing).
3. When prompted, type the new password and press Enter.
4. At the # prompt, type `passwd –f <userid>` and press Enter. This command requires the user to create a different password (from the one you entered the next time he/she logs in.
5. At the # prompt, type `exit` to log out.
6. Inform the user of the new password and then have the user log in. The user will be prompted to change the password when they log in.
Managing features

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

The topics included in this discussion are:

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

What is a timetable?

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

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

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

⚠️ CAUTION:

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

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

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

Timetable input window

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

You can access the Timetable input window from the CentreVu CMS MainMenu. At the MainMenu, press F4 to access the Keep menu, highlight Timetable, and press Enter.
Pressing the down arrow (↓) or the Tab key moves the cursor to the next field on the Timetable input window.
The following table defines what you should enter in each of the Timetable input window fields. Where it is helpful, an example of the entry is provided. This will help you understand what to enter in each of the fields in the Timetable input window.

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

Frequency and attributes
(Select only one):

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

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

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

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

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

For instance, if you want a backup to run after the close of business every weekday but after the daily archiving has completed, you might select Daily as your Frequency, a start time that is after the archive start time, and Tuesday through Saturday for the Days.
In the upper-right corner of the Timetable input window is the Action List. Below is a description of the events that occur for each of the actions available on the Timetable input window.

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

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

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

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

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

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

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

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

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

1. Press Enter to move to the Actions menu.
2. Highlight Add and press Enter to save the basic timetable information and proceed to adding tasks to the timetable.
   If all of the entries on the window are valid, then Successful appears on the Timetable input window status line and the CentreVu CMS MainMenu is displayed.
3. From the CentreVu CMS MainMenu, highlight the task (using normal menu selection rules) that you want to schedule on the timetable.
   The status line at the bottom of the CentreVu CMS MainMenu shows Keeping Entries, indicating that the actions or tasks you select are being recorded.
4. Complete the required field entries on the user window, and then select an action list item.
   When each action list selection is made and validated, Entries Stored is displayed on the status line of the current user window.
5. Repeat entering the required field entries on each of the user windows and action list selections for each task you want to schedule in this timetable.
6. When you are finished adding tasks to this timetable, press F4 to select the Keep menu, highlight Stop, and press Enter.

An Acknowledgment window is displayed.

7. Select y and press Enter to save the tasks that are contained in the timetable.

8. Press the F5 key to select Exit and close the Timetable window.

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

Locating an existing timetable

Sometimes you need to make changes to your timetable.

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

1. Press F4 to select the Keep menu.

2. Highlight Timetable and press Enter.

3. Press Control and Z simultaneously to clear all entries in the Timetable input window.

4. Type the unique name that describes the timetable you want to edit in the Timetable name field.

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

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

   The system populates the scheduling parameters for the timetable you want to edit.
6. Press Enter, select Get Contents from the Action list, and press Enter again.

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

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

Editing tasks in an existing timetable

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

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

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

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

The CMS MainMenu appears, with Keeping Entries displayed in the status line.
2. Highlight *Call Center Administration* from the main menu and press *Enter*.

3. Select *VDN Assignments* from the Call Center Administration menu.

4. Type the required information (the new VDN number and the “Holiday Start” vector name) in the fields of this window, and press *Enter*.

5. Press *Enter* again to select the *Run* action.

   The *Entries stored* message is displayed.

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

6. Press F4 to select the Keep menu.

   A prompt asks if you want to save your changes.

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

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

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

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

⚠️ **WARNING:**

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

What is a script?

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

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

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

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

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

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

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

Administration preparations for automatic scripts

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

To set Controller options, complete the following tasks:

1. From the Controller, select Options from the Tools menu.
2. Select the Scripting tab.
3. Complete the input window.
   For details on each of the fields in this window, press F1.
4. Select OK.
To set a user ID password for scripting, complete the following steps:

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

### Using Scripting to automatically print historical reports

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

### Scripting historical reports

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

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

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

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

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

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

**NOTE:**

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

3. Select OK.

   The selected report’s output window is displayed.

4. Select Script from the Report menu.

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

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

6. Select Save.

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

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

**NOTE:**

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

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

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

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

Using Scripting to export report data

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

To automatically export report data, complete the following steps:

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

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

2. Complete the data export window, but **do not** select *OK*. 
3. Select the *Script* button.

   The Save As Script window is displayed.

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

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

**Using Scripting to schedule operations to occur automatically**

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

**Scripting an agent trace**

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

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

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

   **NOTE:**

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

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

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

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

4. Select *OK*.

   The Save as Script window is displayed.

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

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

6. Select *OK*.

**Organizing your scripts**

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

From the Organize Scripts window, you can:

- Create new folders.
- Rename scripts and folders.
- Move scripts and folders.
- Delete scripts and folders.
Assigning Dictionary names

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

Things to know before you start

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

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

Add a name for a call center entity

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

1. Select Dictionary from the Commands menu.
2. Highlight the call center entity on the Operations tab.
3. Select OK.
   The input window is displayed.
4. Complete the input fields:

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

5. Select Add from the Actions menu or select the Add button.
Creating an agent group

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

To create an agent group, complete the following steps:

2. Select the ACD on which you want to create the agent group.
3. Select OK.
   The Agent Groups window is displayed.
4. Type the name of the agent group that you want to create.
   The group name should be descriptive and reflect your reasons for creating the group.
5. Select Add from the Actions menu or select the Add button.

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

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

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

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

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

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

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

To run a report, complete the following steps:

1. Select Reports from the Commands menu.
2. Select Real-Time, Historical, or Integrated.
3. Select a report from the Reports list box.
4. Select the ACD for which you want to run the report.
5. If you want to schedule the selected report to run at a certain time, select the Script button.
   The Script button displays the Save as Script window, which lets you create a new script for the selected report, but does not run the report. The script type is set to interactive and cannot be changed.
6. Select OK.
   The Reports input window is displayed. The inputs required vary, depending on which report you are running.
7. Fill in the input fields.

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

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

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

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

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

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

9. Ensure that the correct ACD is selected.

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

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

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

10. Select OK.
Defining Exceptions

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

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

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

Setting the exception thresholds

To administer and activate exceptions, complete the following steps:

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

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

Turning on Data Collection

To turn on Data Collection, complete the following steps:

1. Select *CMS System Setup* from the Tools menu
2. Select the Operations Tab
3. Select *Data Collection*
   The Data Collection input window is displayed.
4. Select the *ACD* from which you want to collect data from the drop-down menu.
5. Select the *On* button.
6. Select *Modify* from the Actions menu.
Tracking call activity

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

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

Stroke counts (event counts)

NOTE:
Stroke counts are sometimes referred to as event counts.

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

AUX reason codes

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

Tracking call activity

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

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

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

Call Work Codes

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

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

To avoid the loss of data, it is important to allocate the number of CWCs to be saved by CentreVu CMS in the Data Storage Allocation window, which is accessible from the CMS System Setup menu.
Names can be assigned to CWCs through the Dictionary menu in CentreVu Supervisor. These names are then displayed in CentreVu Supervisor standard CWC reports, that are stored in the Other category of Historical reports.

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

**Logout reason codes**

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

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

**NOTE:**
The EAS feature is required to use Logout reason codes.
Managing features

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

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

The topics included in this discussion are:

- Administering service observing
- Service observing procedures
- Service observing indicators
- Things to consider when service observing
- Security precautions to consider with service observing.
Service observing is administered on the DEFINITY ECS system. Basic service observing is set up to observe an extension, not all calls to all extensions at a terminal. Likewise, VDN service observing is set up to observe an agent in a VDN, not all agents in a VDN.

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

NOTE:
There are many steps that you need to complete to enable service observing. The steps depend on the type of observing that you are establishing. For more detailed information about administering service observing, refer to the DEFINITY® Enterprise Communications Server Administrator’s Guide (555-203-502).
Unless otherwise noted, each of the fields identified in the following summary should be set to y (yes).

**Customer-Options System Parameters Form**

**Required Service Observing Fields**

<table>
<thead>
<tr>
<th>Field</th>
<th>Administered for...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Observing (Basic)</td>
<td>Basic observing</td>
</tr>
<tr>
<td></td>
<td>Logical Agent ID observing</td>
</tr>
<tr>
<td>Service Observing (Basic) and Service Observing (Remote/By FAC)</td>
<td>Remote observing</td>
</tr>
<tr>
<td></td>
<td>Feature access code observing</td>
</tr>
<tr>
<td>Service Observing (Basic) and Service Observing (VDNs)</td>
<td>VDN observing</td>
</tr>
<tr>
<td>Vectoring (Prompting)</td>
<td>Vector-initiated observing</td>
</tr>
</tbody>
</table>

**Class of Restriction Form**

**Required Service Observing Fields**

<table>
<thead>
<tr>
<th>Field</th>
<th>Administered on...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Can Be Service Observed</td>
<td>Agent’s COR to allow the agent to be observed</td>
</tr>
<tr>
<td>Can Be a Service Observer</td>
<td>Observer’s COR to allow the extension owner to observe others</td>
</tr>
<tr>
<td>Service Observing Permissions - Table</td>
<td>Observer’s COR to grant permissions to observe each specific COR</td>
</tr>
</tbody>
</table>
### Feature-Related System Parameters Form
#### Required Service Observing Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Administered for...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Observing Warning Tone</td>
<td>- Notification of agent being observed</td>
</tr>
<tr>
<td>Expert Agent (EAS)</td>
<td>- Logical Agent ID observing</td>
</tr>
</tbody>
</table>

### Station (multi-appearance) Form
#### Required Service Observing Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Administered for...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Button/Feature Button Assignment</td>
<td>- Basic observing</td>
</tr>
<tr>
<td>(set to <code>serv-obsrv</code>)</td>
<td>- VDN observing, or</td>
</tr>
<tr>
<td></td>
<td>- Logical Agent ID observing</td>
</tr>
</tbody>
</table>

### Feature Access(FAC) Form
#### Required Service Observing Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Administered for...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Observing Listen Only Access Code</td>
<td>- Remote/by FAC observing</td>
</tr>
<tr>
<td>(enter the access code)</td>
<td>- VDN observing, or</td>
</tr>
<tr>
<td></td>
<td>- Logical Agent ID observing</td>
</tr>
<tr>
<td>Service Observing Listen/Talk Access Code</td>
<td>- Remote/by FAC observing</td>
</tr>
<tr>
<td>(enter the access code)</td>
<td>- VDN observing, or</td>
</tr>
<tr>
<td></td>
<td>- Logical Agent ID observing</td>
</tr>
</tbody>
</table>
Service observing procedures

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

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

Observing extensions

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

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

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

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

NOTE:

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

Observing VDNs

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

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

NOTE:

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

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

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

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

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

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

Deactivating service observing

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

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

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

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

- Denied.
- Allowed — at the time of activation.
- Allowed — after observe is activated.
Things to consider when service observing

Consider the following circumstances when you are using service observing.

Bridged observers

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

Ineligibility

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

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

Multiple observers

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

NOTE:
Up to 50 VDN calls can be observed concurrently.
Trunk calls

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

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

Conferenced calls

An observer cannot initiate a conference while observing.

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

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

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

If a conference is being observed because an observed agent entered the conference, when the agent hangs up, the conference is no longer observed.

If a conference is being observed because an observed VDN call entered the conference, observing continues until the call is routed to an unobservable destination.
Conference members are observed during a conference regardless of their COR setting.

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

**NOTE:**
The same rules apply when multiple observers monitor transferred calls.

### Transferred calls

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

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

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

**General security**

Use the following COR restrictions to prevent unauthorized observing:

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

**VDN-call security**

Use the following COR restrictions for VDN-call observing:

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

Use the following guidelines for vector-initiated observing:

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

⚠️ CAUTION:

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

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

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

Use the following guidelines for remote observing:

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

NOTE:
Additional Remote Access security measures and codes are described in the DEFINITY® Enterprise Communications Server Administrator’s Guide (555-203-502).
Managing backups

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

The topics included in this discussion are:

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

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

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

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

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

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

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

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

<table>
<thead>
<tr>
<th>File System Backup</th>
<th>Data Saved</th>
<th>Recommended Frequency</th>
</tr>
</thead>
</table>
| cmsadm             | ■ Saves Solaris system files and programs  
|                    | ■ Saves non-CMS data you placed on the computer | ■ Prior to upgrading CentreVu CMS to a new software load  
|                    |                                                      | ■ As soon as possible after an upgrade  
|                    |                                                      | ■ Monthly |
Backup procedures

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

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

Running a full maintenance backup for all ACDs

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

1. Insert a tape in to the backup device.

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

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

2. On the CentreVu Supervisor Controller, select Maintenance from the Tools menu.
3. On the Maintenance selector window, highlight *Back Up Data* in the Operations list and select the *ACD* for which you want to complete a backup.

4. Select *OK*.

   The Backup Data window is displayed.
5. Complete the following options for each field on the window:

<table>
<thead>
<tr>
<th>Field</th>
<th>Default value/action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Device name:</td>
<td>Accept the default device name.</td>
</tr>
<tr>
<td>Verify tape can be read after backup?</td>
<td>Selected</td>
</tr>
</tbody>
</table>

**NOTE:**
When you select the *Verify tape can be read after backup?* field, the system tries to read the data on each tape after the backup finishes writing it. This procedure is relatively fast and ensures that the system can read the data it wrote. If you receive an error message that the tape failed verification, you need to rerun the backup using a different tape.

<table>
<thead>
<tr>
<th>ACDs to backup:</th>
<th>All ACDs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data to backup:</td>
<td>Local Administration Data&lt;sup&gt;a&lt;/sup&gt;</td>
</tr>
<tr>
<td></td>
<td>CMS System Administration Data</td>
</tr>
<tr>
<td></td>
<td>ACD Specific Administration Data</td>
</tr>
<tr>
<td></td>
<td>Historical Data,</td>
</tr>
<tr>
<td></td>
<td>- Full</td>
</tr>
<tr>
<td>Non-CMS data:</td>
<td>Selected</td>
</tr>
</tbody>
</table>

<sup>a</sup> Available beginning with R3V8

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

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

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

Running a cmsadm backup

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

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

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

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

To shut down and restart the system, type `/usr/sbin/shutdown -y -g0 -i6`. 
To run a cmsadm backup, complete the following steps:

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

   ➤ NOTE:
   You can run a cmsadm backup from the CentreVu Terminal Emulator or from the main console.

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

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

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

   The CentreVu CMS Administration menu displays.

4. Select backup from the list of options.
Checking backup status

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

Status messages

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

Error messages

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

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

Console messages

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

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

This message means that a new tape was used for the backup. Ignore this warning, and press Ctrl+L to refresh the screen.
Managing the backup tape rotation, storage, security, and labeling the tape is essential in assuring that if a restore is needed it can be done quickly and accurately.

**Tape rotation**

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

⚠️ **CAUTION:**

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

**Labeling**

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

**Storage**

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

⚠️ **NOTE:**

Use your company’s disaster recovery policy for storage of the backup media.
Automating backups

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

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

**NOTE:**
The cmsadm backup cannot be scheduled to run automatically.
The CentreVu CMS full maintenance backup can be scheduled to run automatically.
Managing backups

Automating backups
Keeping records

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

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

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

The topics included in this discussion are:

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

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

Call center administration records

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

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

Agent administration records

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

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

User permissions records

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

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

CMS system setup records

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

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

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

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

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

**CentreVu CMS server log**

<table>
<thead>
<tr>
<th>Model of the CentreVu CMS server</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Location of the CentreVu CMS server</td>
<td></td>
</tr>
<tr>
<td>Dial up telephone number to the CentreVu CMS server</td>
<td></td>
</tr>
</tbody>
</table>
Recovery kit and software log

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

<table>
<thead>
<tr>
<th>CMS Recovery kit software list:</th>
<th>Where is it securely located?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Latest <code>cnsadm</code> backup tapes</td>
<td></td>
</tr>
<tr>
<td>Latest full (and incremental) maintenance backup tapes</td>
<td></td>
</tr>
<tr>
<td><em>CentreVu</em> CMS Load CD ROM (used for the last upgrade and any <em>CentreVu</em> CMS update CD ROMs used at the same time)</td>
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<tr>
<td>CMS Supplemental Services</td>
<td></td>
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<tr>
<td>Patching CDs and tapes</td>
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</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Required software list for <em>Sun</em> platform:</th>
<th>Where is it securely located?</th>
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</thead>
<tbody>
<tr>
<td><em>INFORMIX</em> ESQL 9.14</td>
<td></td>
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<tr>
<td><em>INFORMIX</em> ILS 2.11</td>
<td></td>
</tr>
<tr>
<td><em>INFORMIX</em> SE 7.22</td>
<td></td>
</tr>
<tr>
<td>Network Terminal Server (optional)</td>
<td></td>
</tr>
<tr>
<td><em>Solaris</em> Easy Access Server 2.0</td>
<td></td>
</tr>
<tr>
<td>(Online DiskSuite 4.2)</td>
<td></td>
</tr>
<tr>
<td><em>Solaris</em> 7 software, dated 3/99</td>
<td></td>
</tr>
<tr>
<td><em>SunLink</em> X.25 Network Interface 9.1 (optional)</td>
<td></td>
</tr>
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</table>
Use the following form to track all of the terminals and PCs that are used to access the CentreVu CMS.

<table>
<thead>
<tr>
<th>Terminal/PC location or user</th>
<th>Terminal/PC type</th>
<th>Terminal/PC port connection number (if serial)</th>
<th>PC CentreVu Supervisor connection options</th>
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<tbody>
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</tbody>
</table>
Printer log

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

<table>
<thead>
<tr>
<th>Printer location or user</th>
<th>Printer model</th>
<th>Printer name</th>
<th>Printer port connection number</th>
</tr>
</thead>
<tbody>
<tr>
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<td>//support.lucent.com/                                              95</td>
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<td>no data</td>
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<td>what to do, 48</td>
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We'd like your opinion.

We welcome your feedback! Please let us know what you think about this book.

Call Center Little Instruction Book
for basic administration
585-210-935, Issue 1, December 1999, Comcode 108502253

1. Please check the ways you feel we could improve this book:

☐ Improve the Welcome  ☐ Make it more concise
☐ Improve the table of contents  ☐ Add more step-by-step procedures/tutorials
☐ Improve the organization  ☐ Add more troubleshooting information
☐ Add more figures  ☐ Make it less technical
☐ Add more examples  ☐ Add more/better quick reference aids
☐ Add more detail  ☐ Improve the index

Please add details about what you think.
______________________________________________________________________
______________________________________________________________________
______________________________________________________________________

2. What did you like most about this book? ____________________________________
______________________________________________________________________
______________________________________________________________________

3. Feel free to write additional comments.____________________________________
______________________________________________________________________
______________________________________________________________________
______________________________________________________________________
______________________________________________________________________
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If we may contact you concerning your comments, please complete the following:

Name:_______________________________Telephone Number: (        )                        __
Company/Organization______________________________________Date:_________
Address:_______________________________________________________________
______________________________________________________________________

When you have completed this form, please fax your feedback to +1 303 538 1741.
Thank you.
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Business Communications Systems main site
Look here for helpful information provided by BCS.
http://www.lucent.com/enterprise/

Customer self service center
Use this site to find answers to questions, review maintenance tickets, or to get the latest version of this book.
http://support.lucent.com/

Bell Labs DEFINITY ECS site
Go here to offer suggestions for what you would change if you were in charge of updating DEFINITY ECS.
http://www.lucent.com/enterprise/sig/develop/

Lucent Training
Browse here to find the latest training courses, instructor chat sessions or professional development programs.
http://www.lucent.com/enterprise/training

International DEFINITY user’s group site
Use this site to find more users, just like you!
http://www.indug.org/
Why this new book?

You’ve told us that you want step-by-step instructions on administration tasks for setting up your Call Center, and keeping it operating at peak performance, and we’ve been listening. This book contains the information you need for basic Call Center administration using the DEFINITY Enterprise Communication System, CentreVu Call Management System (CMS) and CentreVu Supervisor. Some steps may vary between the different versions of DEFINITY systems, CentreVu CMS, and CentreVu Supervisor, but the instructions provided will help you through most of the basic operations.