

**553-4001-906**

# **Meridian Terminal Emulator**

## **MTE User Guide**

Product release 10

Standard 1.0

November 2000

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**NORTEL**  
**NETWORKS™**



# Meridian Terminal Emulator

## MTE User Guide

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## Publication history

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**November 2000** This is first standard release of the *Nortel Networks MTE User Guide* for product release 10.



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# Welcome to MTE

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Meridian Terminal Emulator (MTE) allows you to use your personal computer (PC) to access the supervisor displays in the Meridian MAX, Customer Controlled Routing (CCR), and Network Administration Center (NAC) applications.

## New in MTE 10

MTE 10 now supports the Dynamic Host Configuration Protocol (DHCP) for the local printer.

In Meridian MAX 9 and lower, the local printer depended on the static IP address of the MTE PC. The local printer was created in the MTE session and linked to the default printer configured in the MTE session. However, if the IP address of the MTE PC changed, the MTE session lost its local printer.

In today's LAN environment, many customers use DHCP servers to assign IP addresses to their PCs. The result, however, is that a different IP address can be assigned to a PC each time it is restarted.

To support DHCP with local printers, Meridian MAX 10 uses the Media Access Control (MAC) address of the Ethernet LAN card to associate the correct local printer with the MTE session. It uses the MAC address because LAN cards are rarely changed and the MAC address is unique.

**Note:** MTE 10 cannot connect to MAX 9 or lower.

## About DHCP Support

You can assign the MTE 10 PC either a static IP address or an address from a DHCP server. The following table summarizes the types of IP addresses supported by various Meridian MAX/MTE combinations.

	<b>Meridian MAX 9 or lower</b>	<b>Meridian MAX 10</b>
<b>MTE 9 or lower</b>	Static IP address	Static IP address
<b>MTE 10</b>	Not supported	Static IP address or address from DHCP

# Welcome to MTE

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Local printers created in Meridian MAX 9 or lower do not support DHCP. PCs running any version of MTE to connect to Meridian MAX 9 or lower must be assigned a static IP address. This also applies to the MTE PC that needs to connect to Meridian MAX 10 and Meridian MAX 9 or lower simultaneously. If you need to connect the PC to MAX 10 and MAX 9 simultaneously, both MTE 10 and MTE 9 must be installed in the PC and the PC must be assigned a static IP address.

When MTE 10 is connected to Meridian MAX 10 for the first time, any printer that was created prior to MAX 10 is automatically prepared to support DHCP. Once this conversion is completed, MTE 9 or lower cannot use the local printer. You can continue to use the static IP address, or you can switch between the static IP address and DHCP.

**Note:** DHCP applies only to the MTE PC. You must still assign a static IP address to the Meridian MAX server.

## Limitations

There are a few limitations for MTE 10. These include the following:

- Only local printers created in Meridian MAX 10 using MTE 10 support DHCP.
- Local printers created prior to Meridian MAX 10 or created in Meridian MAX 10 using MTE 9 or lower do not support DHCP.
- You must still assign a static IP address to the Meridian MAX server.
- Once the local printer is converted to support DHCP, MTE 10 must be used to receive print jobs for this local printer.
- MTE 10 cannot be used with releases less than Meridian MAX 10.

## Ongoing and enhanced MTE features

The features offered in previous versions of MTE are continued in MTE 10. These features allow you to do the following:

- Use a graphical user interface while working with the agent status displays. **Note:** This feature is available only in MTE 9 and above, running with Meridian MAX 9 and above. If you are using MTE 9 with Meridian MAX 8 or lower, the displays are shown as a VT220 terminal emulation.
- Use MTE to access NAC. NAC allows you to monitor multiple Meridian MAX sites from one central location. This features requires MTE 9 or above.

# Welcome to MTE

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- Send Meridian MAX reports to any printer supported by your PC. The printer can be directly connected to the PC or accessible through a Local Area Network (LAN). If you connect to NAC, you can also print NAC reports to your printer.

Use context-sensitive programmable buttons to automate your navigation to specific screens. In Meridian MAX, you can program separate buttons for each screen. In CCR, you can program a set of buttons for use exclusively by all the CCR screens.

- Use address book entries to save different connection settings that supervisors frequently use to connect to the Meridian MAX, CCR, or NAC.
- Import or export the address books and programmable buttons.
- Save data to a file for use by third-party applications.
- Use a LAN, a modem, or a serial (RS-232) port to connect to Meridian MAX, CCR, or NAC.
- Open more than one MTE session on a PC running Windows 95, 98, or 2000, or Windows NT.
- Customize the color of elements on your Meridian MAX supervisor screen.
- Provide the equivalent of running CCR or NAC on a VT220 workstation.
- Run your supervisor sessions on the same PC as the MAXcaster forecasting tool, and send your Meridian MAX report data to a file created for MAXcaster.

## For more information

For more information, see the following:

- For Meridian MAX features, refer to the *Meridian MAX 10 Supervisor's User Guide (553-4001-905)*.
- For Microsoft Windows functions, refer to the Microsoft Windows documentation.
- For CCR features, refer to the *Customer Controlled Routing User Guide (P0729367)*.
- For NAC features, refer to the *Network Administration Center (NAC) 2 Supervisor's User Guide (P0724352)*.

# Preparing the Meridian MAX or NAC

---

This section describes the settings that must be adjusted on the Meridian MAX or NAC before the MTE can be used properly.

## Confirming the Meridian MAX settings

To prepare Meridian MAX to run MTE 10, your system administrator or maintenance technician must do the following:

1. Set the terminal type in the Meridian MAX Communication Port Assignment display to “MTE 9 or above.” This is required only if you want to run MTE on serial ports. For more information, refer to the *Meridian MAX 10 Maintenance and Diagnostics Guide* (NTP 553-4001-811), “Configuring the Meridian MAX” chapter, “Meridian MAX Hardware Configuration” section.
2. Set the *Agent Status Timer* field on the Miscellaneous Options display to “On MTE 9 or higher only.” This is required only if you want to use this feature in MTE 9 or higher. For more information, refer to the *Meridian MAX 10 Supervisor’s User Guide* (553-4001-905), “Parameter Administration” chapter, “Miscellaneous Options” section.

**Note:** MTE 10 does not allow users to log on to Meridian MAX 9 or lower.

## Confirming the NAC settings

To prepare NAC to run MTE 10, your system administrator or maintenance technician must do the following:

1. Set the terminal type in the NAC Communication Port Assignment display to “MTE 9 or above.”

# Installing MTE 10

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## MTE minimum requirements

The following minimum requirements must be met to run MTE 10 on your PC:

Software/hardware	Minimum requirement
Meridian MAX	Meridian MAX 10
CCR	<ul style="list-style-type: none"><li>• Release 3.5x (with a LAN)</li><li>• none (with a modem or serial port)</li></ul>
NAC	<ul style="list-style-type: none"><li>• Release 2.5</li></ul>
Microsoft Windows	One of <ul style="list-style-type: none"><li>• Windows NT Release 4.0</li><li>• Windows 95</li><li>• Windows 98</li><li>• Windows 2000</li></ul>
Personal computer	<ul style="list-style-type: none"><li>• 486 DX (for Windows 95/98 only) or Pentium, 33 MHz IBM compatible</li></ul> <p><b>Note:</b> These are the minimum requirements. For more information, refer to the Microsoft Windows documentation for your operating system.</p>
Monitor	Color VGA
Free RAM	16 Mbytes for the MTE application (in addition to the minimum requirement for your operating system as stated in your Microsoft Windows documentation)
Free hard disk	2 Mbytes for the MTE application (in addition to the minimum requirement for your operating system as stated in your Microsoft Windows documentation)
Connection type	<ul style="list-style-type: none"><li>• modem or serial (RS-232) port</li><li>• LAN with WinSock 1.1 compliant network operating software</li></ul>

# Installing MTE 10

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## To upgrade to MTE 10

Follow this procedure to upgrade to MTE 10 from MTE 9 or lower.

1. Ensure that the PC has been assigned a static IP address. For help, refer to your Windows documentation.  
*Note:* To upgrade, the PC must *not* be configured to obtain its IP address from a DHCP server.
2. Install the MTE 10 software using the following procedure, “To install MTE 10.”  
*Note:* Use the Upgrade disks rather than the New Install disks.
3. Connect MTE 10 to Meridian MAX 10.
4. Log on to the Meridian MAX Supervisor display.
5. Press {Control} {P} to ensure that the correct local printer is identified.
6. Print a report to the local printer to ensure that the local printer works.
7. Close the MTE session.
8. If the PC is configured to connect to multiple Meridian MAX 10 systems, repeat this procedure for each Meridian MAX connection.
9. If you want to switch to DHCP now, configure the PC to obtain its IP address from a DHCP server. For help, refer to your Windows documentation.
10. Once the IP address is obtained from the DHCP server, restart the PC.

## To install MTE 10

Follow this procedure to install MTE 10 on your PC. Before you begin, ensure that your computer meets the minimum requirements for MTE 10.

*Note:* If you are using a Windows NT or Windows 2000 system, do not log on as a guest. This can cause problems with MTE’s installation.

1. Insert the MTE 10 disk labeled New Install Disk 1 into your floppy disk drive.
2. On the Start menu, click Run.  
*The Run dialog box appears.*
3. Type the location of your setup file.
  - If the MTE 10 disk is in your drive A, type **a:\setup**.

## Installing MTE 10

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- If the MTE 10 disk is in your drive B, type **b:\setup**.
4. Click OK.

*If you are installing a multilingual version of MTE, a screen appears asking you to select a language. Ensure that the language is compatible with both the language selected on your PC operating system and your application (Meridian MAX, CCR, or NAC). For example, a German supervisor will use German MTE on a German operating system.*



5. Click the language in which you want MTE to run, and then click Continue.

# Installing MTE 10

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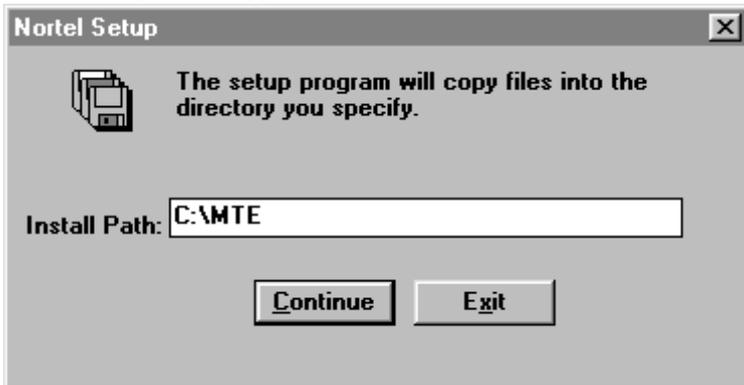
The next setup screen appears.



6. Click Continue.

**Note:** If you are upgrading from an earlier version, the setup program looks for the older MTE release on your PC. If it is not found, the program stops the upgrade procedure and displays an information dialog box asking you to restart. Before restarting the installation, reinstall the older version of MTE.

The next setup screen appears.



7. Type the path and directory:
  - If you want to accept the given default path and directory name, click Continue.
  - If you want to specify a path and directory name that are different from the default, enter them in the Install Path box and click Continue. An

## Installing MTE 10

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example of a valid entry for the path and directory name is D:\MTE10.

*A pop-up window appears showing the progress of the installation.*

8. When prompted, insert the MTE disk requested by the setup program.

**Note:** The setup program prompts you to insert Disk 2.

*The installation continues. When the installation is finished, the last setup screen appears.*



9. Click OK.

*The window closes.*

10. Remove the MTE disk from your floppy disk drive.
11. If you are upgrading from MTE 9 or lower, continue with "To upgrade to MTE 10," step 3, on page 6.

# Maintaining MTE 10

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This section describes what you need to do to maintain the DHCP support for local printing.

## To switch between DHCP and a static IP address

From your network administrator you must obtain the directions to switch the PC to use a static IP address or an address assigned by the DHCP server.

1. Log off the Meridian MAX, CCR, or NAC.
2. Exit MTE.
3. Follow the directions from your network administrator.
4. Restart the PC.

## To replace the Ethernet LAN card

MTE 10 sends the MAC address of the Ethernet LAN card to Meridian MAX 10 so that Meridian MAX 10 can associate the correct local printer with the MTE session.

If the Ethernet LAN card is replaced, you must do the following so that Meridian MAX can associate the new MAC address with the local printer:

1. Reconnect MTE 10 to Meridian MAX 10.  
A warning message appears to alert you that the LAN card has been changed since the previous MTE session. You are also warned that local printers are not accessible if you do not follow this procedure.
2. Click OK to continue.
3. If the PC is configured to connect to multiple Meridian MAX 10 systems, you must reconnect with each system.

# Maintaining MTE 10

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## To replace the MTE PC or hard disk

If you need to replace the MTE PC or hard disk that has MTE installed on it, complete the following procedure:

1. Before you replace the PC or hard disk, connect MTE 10 to Meridian MAX 10 and delete the local printers.
2. If the PC is configured to connect to multiple Meridian MAX 10 systems, repeat step 1 for each Meridian MAX connection.
3. Start the new PC or the PC with the new hard disk.
4. Reinstall MTE 10.  
For help, see “To install MTE 10” on page 6.
5. Connect MTE 10 to Meridian MAX and recreate the local printers.
6. If the PC is configured to connect to multiple Meridian MAX 10 systems, repeat step 5 for each Meridian MAX connection.

## To uninstall MTE 10

Use the appropriate procedure for your operating system.

### Windows 95/98

1. Delete all files from the directory where MTE 10 is installed.
2. On the Windows Start menu, click Run.
3. In the Run dialog box, type **regedit** and click OK.
4. In the Registry Editor, open the HKEY\_CLASSES\_ROOT folder.
5. Delete the MTE folder.
6. On the Windows Start menu, delete the Meridian Terminal Emulator folder.

### Windows 2000 and NT 4.0

1. Delete all files from the directory where MTE 10 is installed.
2. On the Windows Start menu, click Run.
3. In the Run dialog box, type **regedt32** and click OK.
4. In the Registry Editor, open the HKEY\_CLASSES\_ROOT on Local Machine folder.

## Maintaining MTE 10

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5. Delete the MTE folder.
6. If the MTE\_NEW folder is shown, delete this folder as well.

# Connecting to an application

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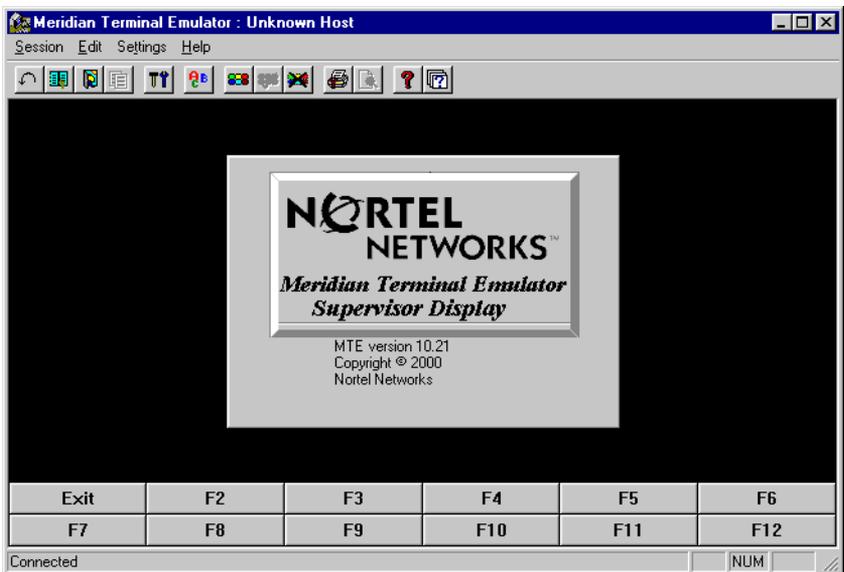
This section describes how to use a serial port, LAN, or modem to connect to your Meridian MAX, CCR, or NAC applications. To connect to your application, MTE automatically uses the connection settings defined in one of the following:

- an Address Book entry defined as the system default  
For more information on address books, see page 21.
- the factory default settings predefined in MTE  
If a system default is not specified, MTE uses the factory default settings to connect to your application. For more information on the factory default settings, see page 17.

## To connect using a LAN

1. Double-click the MTE icon.

*The MTE window appears, displaying the Nortel Networks logo and copyright information. The logo and copyright disappear after a few seconds. The word “Connected” also appears in the status bar at the bottom of the MTE window.*

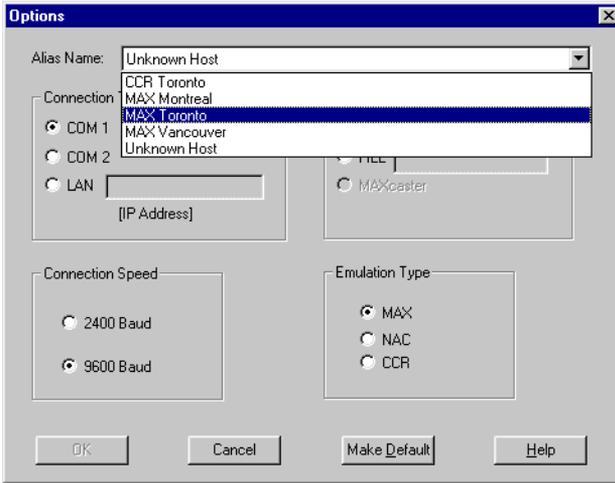


## Connecting to an application

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2. On the Settings menu, click Edit Options.

*The Options dialog box appears.*



3. Select an address from the Alias Name drop-down menu.
4. In the Connection Type area, click LAN.
5. In the IP Address box, type the IP address.
6. In the Emulation Type area, click MAX, CCR, or NAC.
7. Click OK to return to the MTE window.
8. Wait for your PC to connect to the Meridian MAX, NAC, or CCR.
9. Log on to your application, typing your ID and password when prompted.

*If the connection is successful, the Meridian MAX, CCR, or NAC logon screen appears.*

*Your Meridian MAX, CCR, or NAC main menu appears.*

# Connecting to an application

---

## To connect using a serial port

1. Double-click the MTE icon.

*The MTE window appears, displaying the Nortel Networks logo and copyright information. The logo and copyright disappear after a few seconds. The word “Connected” also appears in the status bar at the bottom of the MTE window.*

2. On the Settings menu, click Edit Options.

*The Options dialog box appears.*

3. In the Connection Type area, click COM 1 or COM 2.

**Note:** *Do not assign MTE to the same port used by the printer or other devices.*

4. In the Connection Speed area, click 9600 Baud.

5. In the Emulation Type area, click MAX, NAC, or CCR.

6. Click OK to return to the MTE window.

7. Wait for your PC to connect to the Meridian MAX, CCR, or NAC.

*If the connection is successful, the Meridian MAX, CCR, or NAC logon screen appears.*

8. Log on to your application, typing your ID and password when prompted.

*Your Meridian MAX, CCR, or NAC supervisor main menu appears.*

# Connecting to an application

---

## To connect using a modem

1. Double-click the MTE icon.

*The MTE window appears, displaying the Nortel Networks logo and copyright information. The logo and copyright disappear after a few seconds. The word "Connected" also appears in the status bar at the bottom of the MTE window.*

2. On the Settings menu, click Edit Options.

*The Options dialog box appears.*

3. In the Connection Type area, click COM 1 or COM 2.
4. In the Emulation Type box, click MAX, NAC, or CCR.
5. Click OK to return to the MTE window.
6. At the modem prompt, type **at&f** and press Enter.

*The modem responds with OK.*

7. Type **atdt** and the phone number and press Enter.

Use commas where you want the modem to pause for two seconds during dial-up. For example, to dial 9-555-1212 where a 9 is dialed to obtain an outside line, type **atdt 9,5551212**.

For more information on dialing in to a remote site, refer to your modem documentation.

*The system dials the number you have entered.*

8. Wait for the modem to indicate that you are connected.

*Once you are connected, you might be asked to specify the display type that you are using.*

9. Specify the display type that you are using:
  - If you are connecting to Meridian MAX 10 or above, or NAC 2.5, select MTE 9 or above.
  - If you are connecting to CCR and you are prompted for a display type, select VT220.
10. Log on to your application, typing your ID and password when prompted.

*Your Meridian MAX, CCR, or NAC main menu appears.*

# Connecting to an application

---

## To connect using the factory default settings

MTE uses the factory default settings to connect to the Meridian MAX in the following situations:

- You are installing MTE for the first time.
- The system default has been deleted. MTE uses the original factory default settings to connect to the Meridian MAX when the system default is deleted.

The factory default settings are as follows:

- Alias Name (Unknown Host)
- Communication Type (COM 1)
- Connection Speed (9600 baud)
- Emulation Type (Meridian MAX)
- Printer Port (Windows default printer)

If you are upgrading from MTE 5 or installing MTE 10 for the first time, MTE automatically creates the “Unknown Host” entry in the address book. This entry contains all of these factory default settings.

If you are upgrading from MTE 6 or MTE 7, MTE still creates the “Unknown Host” entry in the address book. However, the other values for this entry are inherited from the system default settings created in the previous version of MTE.

If you are upgrading from MTE 8 or above, the address book remains unchanged.

**Note:** Nortel Networks recommends that you do not modify the factory default settings.

## To connect using the default settings

1. Double-click the MTE icon.

*If an address book entry has not been defined as the system default, MTE uses the factory default settings. The MTE window appears, displaying the Nortel Networks logo and copyright information. The logo and copyright disappear after a few seconds. The word “Connected” also appears in the status bar at the bottom of the MTE window.*

2. Wait for your PC to connect to the Meridian MAX, CCR, or NAC.

*If the connection is successful, the Meridian MAX, CCR, or NAC logon screen appears.*

## Connecting to an application

---

3. Log on to your application, typing your ID and password as prompted.  
*Your Meridian MAX, CCR, or NAC main menu appears.*

### To fix a connection problem

If you experience problems connecting to your Meridian MAX, CCR, or NAC, try the following:

- Ask your system administrator to check that Meridian MAX, CCR, or NAC is running, then click Restart to reestablish the connection.
- Ask your network administrator to check that the network software is configured correctly.
- Make certain that the port used by MTE is not used by the printer or other devices.
- If the PC is configured to obtain the IP address from the DHCP server, ensure that the IP Address is still valid. If the IP address lease has expired, you must obtain a new IP address from your network administrator.
  - a. Exit MTE.
  - b. Enter the new IP address obtained from your network administrator.  
For more information, see your Windows documentation.
  - c. Restart your computer.

# Using the MTE toolbar

---

MTE allows you to carry out various procedures by clicking buttons on the toolbar. Each button represents one of the MTE menu commands. This table describes the functions of each of the toolbar buttons.

<b>Button</b>	<b>Name</b>	<b>Function</b>
	Restart Session	Restarts the supervisor session.
	Address Book	Opens the Address Book dialog box.
	Exit	Exits MTE.
	Copy	Copies the highlighted text to your clipboard.
	Options	Opens the Options dialog box.
	Font	Opens the Font dialog box.
	Customize Buttons	Opens the Customize Buttons dialog box. This button is available only when the programmable buttons are enabled.
	Enable Buttons	Enables the programmable buttons. This button is available only when the programmable buttons are disabled.
	Disable Buttons	Disables the programmable buttons. This button is available only when the programmable buttons are enabled.
	Print Setup	Opens the Print Setup dialog box. This button is available only when MTE is connected to Meridian MAX.

# Using the MTE toolbar

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<b>Button</b>	<b>Name</b>	<b>Function</b>
	Print Preview	Opens the Print Preview dialog box. This button is available only if you are connected to Meridian MAX 8.6x or higher, and a report is ready to be previewed.
	About	Displays version and copyright information.
	Help	Displays the MTE online Help.

# Using address books

---

This section describes how to use entries in the address book.

Address book entries contain settings to link your PC to different supervisor sessions in the Meridian MAX, CCR, or NAC. You can save and reuse these settings. You can create a maximum of 30 entries in an address book.

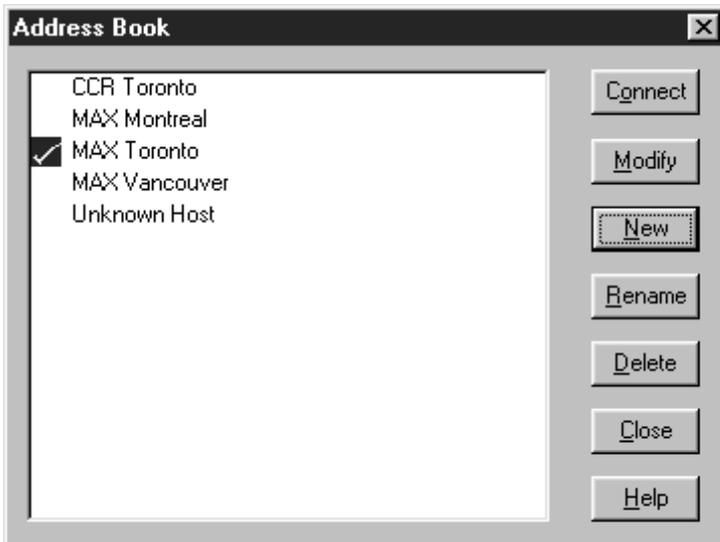
Only one address book can be active on your PC at one time. If you have more than one MTE 10 session running on your PC, any changes made to the address book in one session are applied to all the other active MTE 10 sessions.

## To display the Address Book dialog box

The Address Book dialog box must be displayed to create or access an address book entry. The dialog box lists all of the entries in an address book.

1. On the Session menu, click Address Book, or click Address Book on the toolbar.

*The Address Book dialog box appears. If an address book entry has been defined as the system default, it is identified by a check mark.*



# Using address books

---

## To create an address book entry

1. On the Session menu, click Address Book, or click Address Book on the toolbar.

*The Address Book dialog box appears.*

2. Click New.

*The New Address dialog box appears.*

The screenshot shows a dialog box titled "New Address". It has a standard Windows-style title bar with a close button (X) in the top right corner. The dialog is organized into several sections:

- Alias Name:** A text input field for entering a unique name.
- Connection Type:** A group box containing three radio buttons: "COM 1", "COM 2", and "LAN". The "LAN" option is selected, and there is a text input field next to it labeled "[IP Address]".
- Printer Port:** A group box containing three radio buttons: "Printer", "FILE", and "MAXcaster". The "FILE" option is selected, and there is a text input field next to it.
- Connection Speed:** A group box containing two radio buttons: "2400 Baud" and "9600 Baud".
- Emulation Type:** A group box containing three radio buttons: "MAX", "NAC", and "CCR".

At the bottom of the dialog, there are four buttons: "OK", "Cancel", "Make Default", and "Help".

3. In the Alias Name box, type a unique name to identify the address book entry.

The name is case-sensitive and can be up to 30 characters in length.

## Using address books

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4. Select a connection type:
  - If you want to connect to the Meridian MAX, CCR, or NAC through a serial port or modem, click COM 1 or COM 2.
  - If you want to connect through a LAN, click LAN and enter the IP address or host name of the Meridian MAX, CCR, or NAC. The LAN button is disabled if WinSock 1.1 compliant network operating software is not installed on the PC.

5. Select a connection speed:
  - If you are using a serial port or a modem, click 9600 baud.
  - If you are using a LAN, you cannot select a connection speed.

**Note:** If you are connected through a serial port, the baud rate should not be changed from the default setting of 9600 baud. Your application uses this parameter to communicate with the supervisor displays.

6. Select an emulation type:
  - If you want to connect to a Meridian MAX, click MAX.
  - If you want to connect to a CCR, click CCR.
  - If you want to connect to an NAC, click NAC.

7. Select a printer port:
  - If you want to print your Meridian MAX reports, click Printer.  
For more information on printing reports, see page 60.
  - If you want to send your Meridian MAX or NAC reports to a file, click File and type the path and file name that you want to use.  
For example, type `C:\MTE\NEWFILE`. For more information on saving reports to a file, see page 54.
  - If you want to use your Meridian MAX report data in the MAXcaster forecasting tool, click MAXcaster.  
For more information on saving data for MAXcaster, see page 57.

# Using address books

---

8. Save your record:
  - If this entry is to be saved but not used as the system default, click OK.  
*The New Address dialog box closes. The name of your new address book entry appears in the Address Book dialog box.*
  - If this entry is to be saved as the system default, click Make Default followed by Yes.  
*The New Address dialog box closes. A check mark appears beside the name of your new address book entry in the Address Book dialog box. This indicates that this is the system default.*
- Note:** When MTE is started, it automatically uses the system default to connect to the Meridian MAX, CCR, or NAC. This address book entry remains the system default until you select a new one. If a system default is not assigned, MTE uses the factory defaults. For more information on the factory default settings, see page 17.
9. Click Close to return to the MTE window.
10. To activate the new address book entry, follow the procedure described in the “To connect to an address book entry” section below.

## To connect to an address book entry

MTE must be told which address book entry to use to create a link to the Meridian MAX, CCR, or NAC.

1. On the Session menu, click Address Book, or click Address Book on the toolbar.  
*The Address Book dialog box appears with a list of existing address book entries.*
2. With the alias name of the address book entry highlighted, click Connect, or double-click the name of the entry.  
*The Address Book dialog box is closed. When the connection is made, the Meridian MAX, CCR, or NAC screen appears. The name of the selected address book entry also appears in the title of the MTE window.*

# Using address books

---

## To modify an address book entry

1. On the Session menu, click Address Book, or click Address Book on the toolbar.

*The Address Book dialog box appears with a list of the address book entries.*

2. With the alias name of the address book entry highlighted, click Modify.

*The Modify Address dialog box appears.*

**Modify Address**

Alias Name: System 3

Connection Type

COM 1

COM 2

LAN 47.235.3.25  
[IP Address]

Printer Port

Printer

FILE

MAXcoaster

Connection Speed

2400 Baud

9600 Baud

Emulation Type

MAX

NAC

CCR

OK Cancel Make Default Help

3. Make your changes to the address book entry.
4. Save your modifications:
  - If this entry is to be saved but not used as the system default, click OK.  
*The options are saved and the Modify Address box closes.*
  - If this entry is to be saved as the system default, click Make Default followed by Yes.

*The changes are saved. In the Address Book dialog box, a check mark appears beside your address book entry to indicate that it is the system default.*

# Using address books

---

## To rename an address book entry

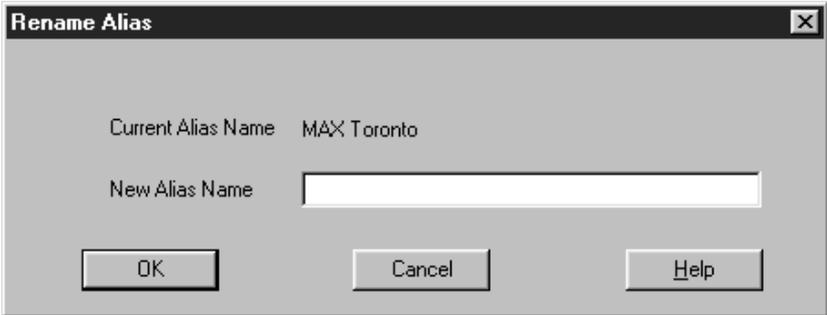
If an address book entry is renamed while it is in use, the new name appears in the MTE window. If you are running other MTE sessions at the same time, the new name does not appear until each session is terminated and restarted. If the address book entry was the system default, it remains the system default after it is renamed.

1. On the Session menu, click Address Book, or click Address Book on the toolbar.

*The Address Book dialog box appears with a list of existing address book entries.*

2. With the alias name of the address book entry highlighted, click Rename.

*The Rename Alias dialog box appears.*



3. In the New Alias Name box, type the new name of the address book entry.
4. Click OK to return to the Address Book dialog box.
5. Click Close to return to the MTE window.

# Using address books

---

## To delete an address book entry

You cannot delete an address book entry while it is in use by MTE. If you delete an entry that is being used as the system default, a dialog box appears asking you to confirm the deletion. Once you delete the system default, the factory default settings are used until another address book entry is selected as the system default.

1. On the Session menu, click Address Book, or click Address Book on the toolbar.

*The Address Book dialog box appears with a list of existing address book entries.*

2. With the alias name of the address book entry highlighted, click Delete.
3. In the confirm dialog box, click Yes.

*The entry is deleted from the Address Book dialog box.*

4. Click Close to return to the MTE window.

## To export an address book

You can export an address book from your MTE and save it into a file. This file can then be imported by other PCs running MTE. You should not use other applications to alter the contents of an address book file.

1. On the Session menu, click Export File.
2. On the Export File submenu, click Address Book.

*The Save As dialog box appears.*

3. Assign the directory and file name to be used to save the address book.
4. Click Save.

*The selected address book is saved to the assigned directory. The system automatically formats the address book file for use exclusively by MTE.*

# Using address books

---

## To import an address book

An address book can be imported and shared by other PC users running Microsoft Windows. Do not use other applications to alter the contents of an imported address book file.

You must import an address book file that has been exported from MTE on a PC.

1. Copy the exported address book file to your PC.
2. On the Session menu, click Import File.
3. On the Import File submenu, click Address Book.

*The Open dialog box appears.*

4. Locate the directory and folder containing the address book file.
5. Double-click the address book file to be imported.

*The selected address book is copied to MTE. If an address book is already in use, a dialog box appears asking if you want to overwrite it.*

6. Click Yes to confirm the import.
7. Click Close to return to the MTE window.

# Monitoring agents

---

The Agent Status Display feature allows you to monitor the status of the agents and the queues they are servicing. You can also use this feature to reassign agents, queues, priorities, and supervisors. With MTE 9 and higher, the agent status displays are presented with a graphical user interface that provides pull-down menus to replace the softkey functions used in MTE 8 or lower. This feature is available if MTE 9 or higher is connected to Meridian MAX 9 or higher with two exceptions. The following table summarizes the availability of the Agent Status Display.

**Table 1: Agent Status Display availability**

	MAX 9	MAX 10
MTE 10 Serial	No supported	No
MTE 10 LAN	Not supported	Yes
MTE 9 Serial	Yes	No
MTE 9 LAN	Yes	Yes
MTE 8 or lower Serial	No	No
MTE 8 or lower LAN	No	No

This section describes only how to navigate through the three agent status displays using MTE 9 or 10. For detailed descriptions on the displays and boxes, refer to the *Meridian MAX 10 Supervisor's User Guide (553-4001-905)*, "Agent Status Display" chapter.

In MTE 9 and higher, programmable buttons are not available on the agent status displays.

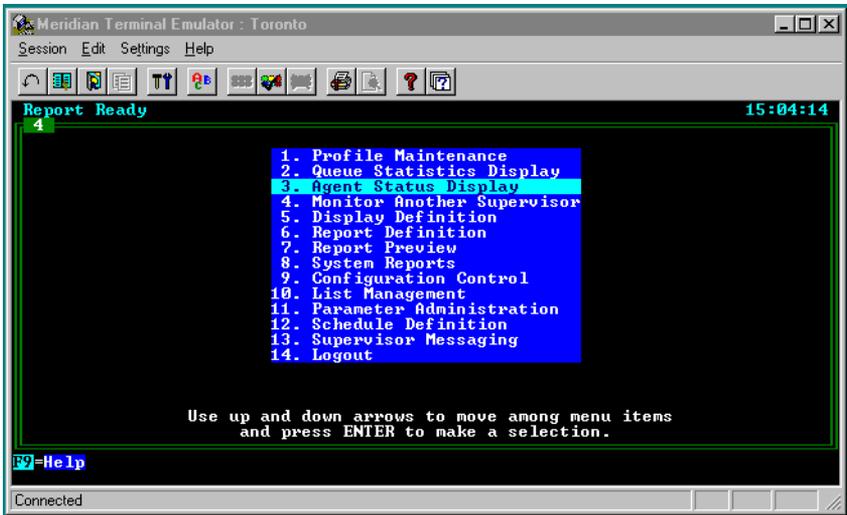
**Note:** If you are running MTE 8 or lower, the agent status displays are shown using the VT220 terminal emulation. All the other Meridian MAX displays are presented with the VT220 terminal emulation, even if MTE 9 or higher is used.

## To use agent status displays

To access the agent status displays, follow these steps.

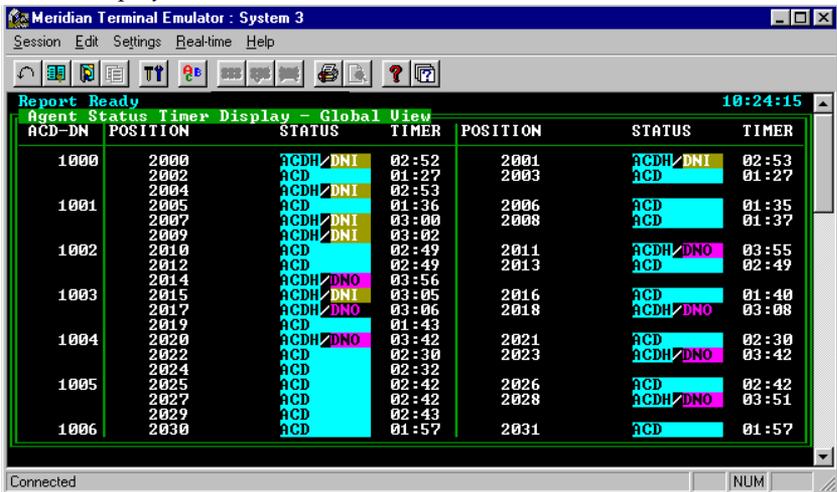
1. Display the Meridian MAX main menu.

# Monitoring agents



2. On the Meridian MAX main menu, select Agent Status Display.

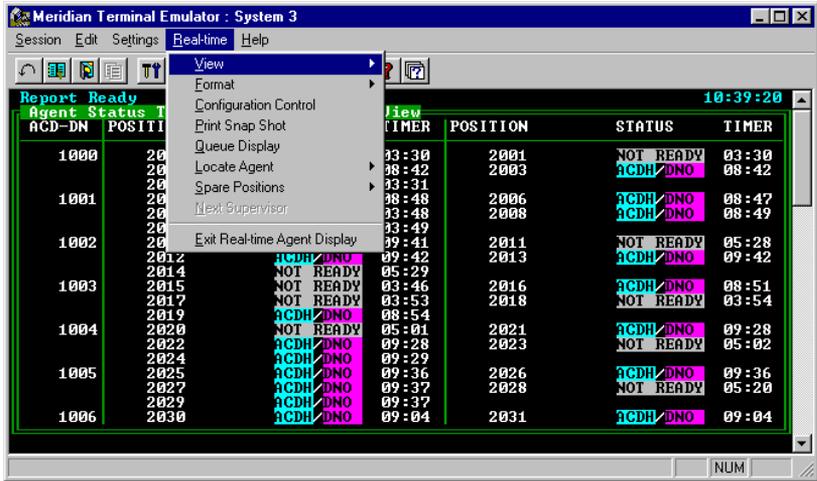
*One of three agent status displays appears. In this example, the Agent Status Timer Display is shown.*



3. To access the options to navigate around the three agent status displays, click Real-time on the MTE menu.

# Monitoring agents

*The Real-time pull-down menu appears.*



# Monitoring agents

## To monitor agents by supervisor view

The agent status displays can be shown in a supervisor or global view.

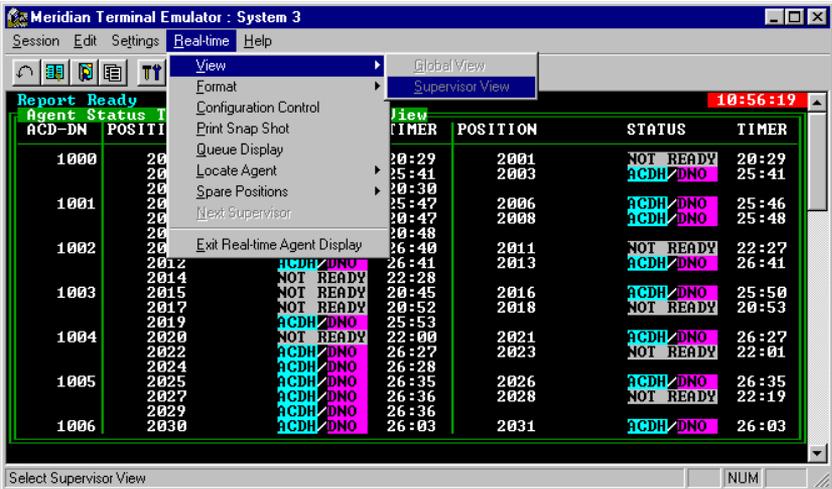
The supervisor view shows the status of all agents assigned to a specific supervisor. The name or ID of the supervisor appears in the title status bar at the top of the screen. The supervisor view option is not available if the agent information is already in supervisor mode on the display.

To use the supervisor view, the Meridian 1 Position ID must be defined in the supervisor's profile. This also allows the supervisor to toggle between the supervisor view and the global view. For more information, refer to the *Meridian MAX 10 Supervisor's User Guide (553-4001-905)*, "Parameter Administration" chapter, "Supervisor Definition" section.

To view the displays in supervisor view, follow these steps.

1. On the Real-time menu, click View.

*The View submenu appears.*



2. On the View submenu, click Supervisor View.

*The data for the agents assigned to the supervisor appear in the display. The words "Supervisor View" appear in the title bar at the top of the display.*

# Monitoring agents

---

## To monitor agents by global view

The global view displays the status of all the agents in the system.

To use the Global View option, the Global Statistics field must be enabled in your supervisor profile. It is also not available if the agent information is already shown in global mode on the display. For more information on the supervisor profile, refer to the *Meridian MAX 10 Supervisor's User Guide (553-4001-905)*, “Parameter Administration” chapter, “Supervisor Definition” section.

To view the displays in global view, follow these steps.

1. On the Real-time menu, click View.

*The View submenu appears.*

2. On the View submenu, click Global View.

*The data for all the agents appears on the display. The words “Global View” appear in the title bar at the top of the display.*

## To monitor agents by ACD-DNs

The Agent Status by ACD-DN Display allows you to view the agent data sorted by queue.

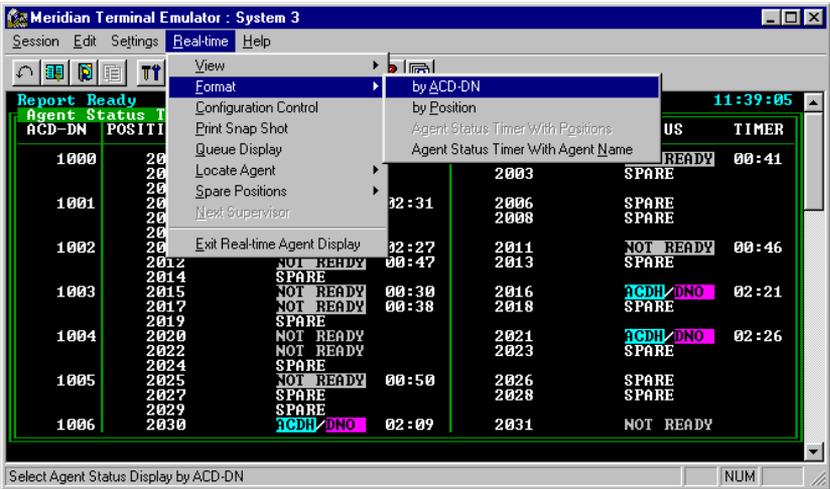
For more information on this display, refer to the *Meridian MAX 10 Supervisor's User Guide (553-4001-905)*, “Agent Status Display” chapter, “Agent Status by ACD-DN Display” section.

To monitor the agents by ACD-DN, follow these steps.

1. On the Real-time menu, click Format.

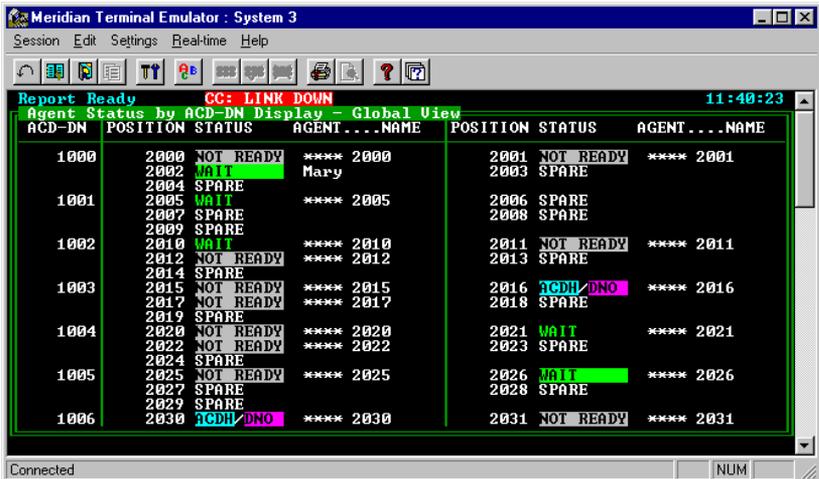
# Monitoring agents

The Format submenu appears.



- On the Format submenu, click “by ACD-DN.”

The Agent Status by ACD-DN Display appears.



# Monitoring agents

## To monitor agents by positions

The Agent Status by Position Display allows you to view the agent data sorted by position ID.

For more information on this display, refer to the *Meridian MAX 10 Supervisor's User Guide (553-4001-905)*, “Agent Status Display” chapter, “Agent Status by Position Display” section.

To monitor the agents by positions, follow these steps.

1. On the Real-time menu, click Format.

*The Format submenu appears.*

2. On the Format submenu, click “by Position.”

*The Agent Status by Position Display appears.*

Report Ready CC: LINK DOWN 11:41:54

Agent Status by Position Display - Global View

POSITION	AGENT...NAME	STATUS	ACD-DN:PRI	ACD-DN:PRI	ACD-DN:PRI
2000	**** 2000	ACDH/DNI	1000	1	
2001	**** 2001	ACDH/DNO	1000	1	
2002	Mary	ACD	1000	1	
2003		SPARE	1000	1	
2004		SPARE	1000	1	
2005	**** 2005	ACD	1001	1	
2006		SPARE	1001	1	
2007		SPARE	1001	1	
2008		SPARE	1001	1	
2009		SPARE	1001	1	
2010	**** 2010	ACD	1002	1	
2011	**** 2011	ACDH/DNO	1002	1	
2012	**** 2012	ACDH/DNO	1002	1	
2013		SPARE	1002	1	
2014		SPARE	1002	1	
2015	**** 2015	ACDH/DNI	1003	1	
2016	**** 2016	ACD	1003	1	
2017	**** 2017	ACDH/DNO	1003	1	
2018		SPARE	1003	1	

Connected NUM

# Monitoring agents

## To monitor agents using the position and timer

The Agent Status Timer Display allows you to view the agent data using the position ID and timer. The timer indicates the amount of time an agent has been doing certain types of activities.

For more information on this display, refer to the *Meridian MAX 10 Supervisor's User Guide (553-4001-905)*, "Agent Status Display" chapter, "Agent Status by Timer Display" section.

To monitor the agents by position ID and timer, follow these steps.

1. On the Real-time menu, click Format.

*The Format submenu appears.*

2. On the Format submenu, click Agent Status Timer With Positions.

*The Agent Status Timer Display appears with its Timer field. The agents are identified by position ID.*

ACD-DN	POSITION	STATUS	TIMER	POSITION	STATUS	TIMER
1000	2000	ACDH/DNO	02:26	2001	ACDH/DNO	02:29
	2002	NOT_READY	00:36	2003	SPARE	
	2004	SPARE				
1001	2005	NOT_READY	00:51	2006	SPARE	
	2007	SPARE		2008	SPARE	
	2009	SPARE				
1002	2010	NOT_READY	00:45	2011	ACDH/DNO	02:32
	2012	ACDH/DNO	02:32	2013	SPARE	
	2014	SPARE				
1003	2015	ACDH/DNO	02:23	2016	NOT_READY	
	2017	ACDH/DNO	02:27	2018	SPARE	
	2019	SPARE				
1004	2020	ACDH/DNO	02:16	2021	NOT_READY	
	2022	ACDH/DNO	02:17	2023	SPARE	
	2024	SPARE				
1005	2025	ACDH/DNO	02:34	2026	NOT_READY	00:47
	2027	SPARE		2028	SPARE	
	2029	SPARE				
1006	2030	ACD	01:23	2031	ACDH/DNO	02:19

# Monitoring agents

## To monitor agents using the agent name and timer

The Agent Status Timer Display allows you to view the agent data using the agent name and timer. The timer indicates the amount of time an agent has been doing certain types of activities.

For more information on this display, refer to the *Meridian MAX 10 Supervisor's User Guide (553-4001-905)*, "Agent Status Display" chapter, "Agent Status by Timer Display" section.

To monitor the agents by agent name and timer, follow these steps.

1. On the Real-time menu, click Format.

*The Format submenu appears.*

2. On the Format submenu, click Agent Status Timer with Agent Name.

*The Agent Status Timer Display appears with the Timer field. The agents are identified by agent name.*

ACD-DN	AGENT...NAME	STATUS	TIMER	AGENT...NAME	STATUS	TIMER
1000	**** 2000	WAIT		**** 2001	WAIT	
	Mary	ACDH/DNI			SPARE	
1001	**** 2005	SPARE			SPARE	
		ACDH/DNI			SPARE	
1002	**** 2010	SPARE		**** 2011	WAIT	
	**** 2012	ACDH/DNI			SPARE	
1003	**** 2015	WAIT		**** 2016	ACDH/DNI	
	**** 2017	WAIT			SPARE	
1004	**** 2020	SPARE		**** 2021	NOT READY	02:08
	**** 2022	WAIT		**** 2023	WAIT	01:39
1005	**** 2025	SPARE		**** 2026	ACDH/DNI	
		SPARE			SPARE	
1006	**** 2030	NOT READY	01:41	**** 2031	WAIT	

# Monitoring agents

## To access the Configuration Control feature

On the Real-time menu, you can access the Configuration Control feature in Meridian MAX. This feature allows you to adjust various options on the Meridian 1. The Configuration Control pop-up window appears at the bottom of the agent status display using the VT220 terminal emulation.

While you view the Configuration Control window, MTE 10 continues to update the agent status displays. Although the Configuration Control feature uses VT220 terminal emulation, the programmable buttons are not available with the display.

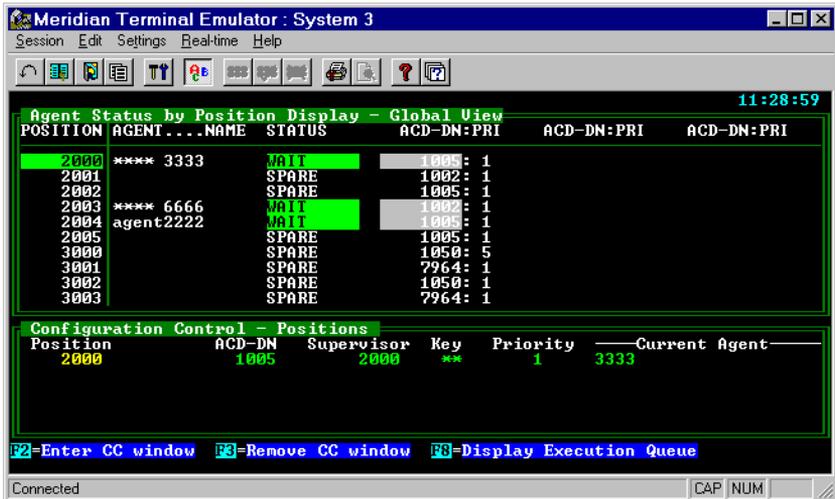
**Note:** The Configuration Control feature is not available from the Agent Status Timer with Agent Name display.

For more information on the Configuration Control feature, refer to the *Meridian MAX 10 Supervisor's User Guide (553-4001-905)*, "Configuration Control" chapter.

To access the Configuration Control feature, follow this step.

1. On the Real-time menu, click Configuration Control.

*The Configuration Control pop-up window appears at the bottom of the agent status display.*



# Monitoring agents

---

## To print the agent status information

You can print a snapshot of the information on the agent status display that you are viewing. The information is printed to the default printer specified in the Print Setup option (located through the Session menu).

To print the agent status information, follow this step.

1. On the Real-time menu, click Print Snap Shot.

*The snapshot of the display is captured and printed.*

## To monitor queues

You can switch from any of the agent status displays to a queue statistics display. This allows you to monitor the performance of the queues.

When you view the queue statistics display, the agent status display and Configuration Control window (if opened) are closed. The queue display is shown using the VT220 terminal emulation.

For more information on the Queue Statistics Display feature, refer to the *Meridian MAX 10 Supervisor's User Guide (553-4001-905)*, "Queue Statistics Display" chapter.

To access a queue statistics display, follow these steps.

1. On the Real-time pull-down menu, click Queue Display.

# Monitoring agents

*A queue statistics display appears.*

Meridian Terminal Emulator : System 3  
 Session Edit Settings Help  
 Report Ready CC: LINK DOWN 11:36:24  
 Standard Tabular ACD-DN Display - Global View  
 AVERAGE DELAY SERVICE LEVEL % ABANDONED ANSWERED CALLS DIRECT CALLS WAITING VIRTUAL TIME-OVERFLOW IN OUT

ACD-DN	AVERAGE DELAY	SERVICE LEVEL %	ABANDONED	ANSWERED	CALLS DIRECT	CALLS WAITING VIRTUAL	TIME-OVERFLOW IN	TIME-OVERFLOW OUT
1000	92	0	0	2	4	0	0	0
1001	399	0	0	3	4	0	0	0
1002	326	0	0	1	10	0	0	0
1003	245	0	0	4	5	0	0	0
1004	168	0	0	6	9	0	0	0
1005	346	0	0	2	4	0	0	0

Position Status Counts  
 ACD-DN STAFFED SPARE ACD CALL NOT READY WAITING DN CALL

ACD-DN	STAFFED	SPARE	ACD CALL	NOT READY	WAITING	DN CALL
1000	3	2	0	0	1	2
1001	2	3	0	0	1	1
1002	1	4	0	0	1	0
1003	2	3	0	0	0	2
1004	4	1	0	0	2	2
1005	1	4	0	0	0	1

F1=Help F2=Commands F3=Configuration Control F4=Print F5=Agent Display  
 Exit F2 F3 F4 F5 F6  
 F7 F8 F9 F10 F11 F12  
 Connected CAP NUM

- To return to the agent status display, press the Agent Display function key.  
*The agent status display appears.*

# Monitoring agents

---

## To locate an agent

In the agent status displays, you can search for an agent based on the agent ID, position ID, or agent name.

The system can respond to the search in a variety of ways:

- If the search is successful and the agent is only servicing one queue, the matching entry appears at the top of the display.
- If you are searching for an agent on the Agent Status by ACD-DN Display and the agent is servicing multiple queues, a pop-up window appears. The pop-up window displays a list of the ACD-DNs being serviced by the agent in the order the agent used to log on to them. Select the ACD-DN that you want from the list; it appears at the top of the display.
- If you are searching for an agent on the Agent Status by Position Display and the agent is servicing multiple queues, the first matching entry appears at the top of the display.
- If the search is unsuccessful, an error message appears.

## Search by Agent ID

To search by agent ID, follow these steps.

1. On the Real-time menu, click Locate Agent.

*The Locate Agent submenu appears.*



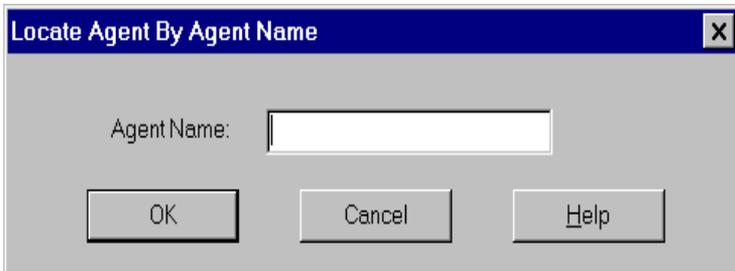
# Monitoring agents

---

## Search by Agent Name

To search by agent name, follow these steps.

1. On the Real-time menu, click Locate Agent.  
*The Locate Agent submenu appears.*
2. On the Locate Agent submenu, click “by Agent Name.”  
*The Locate Agent By Agent Name window appears.*



3. In the Agent Name box, type the agent’s name.

**Note:** The Agent Name is case sensitive.

*It is possible for different agents to have the same name. If this occurs, a secondary menu of the matching agent IDs is presented.*

# Monitoring agents

---



4. Select the agent ID from the list.
5. Click OK.

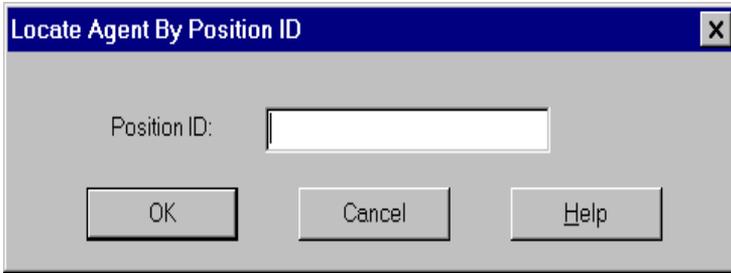
## Search by Position

To search by position ID, follow these steps.

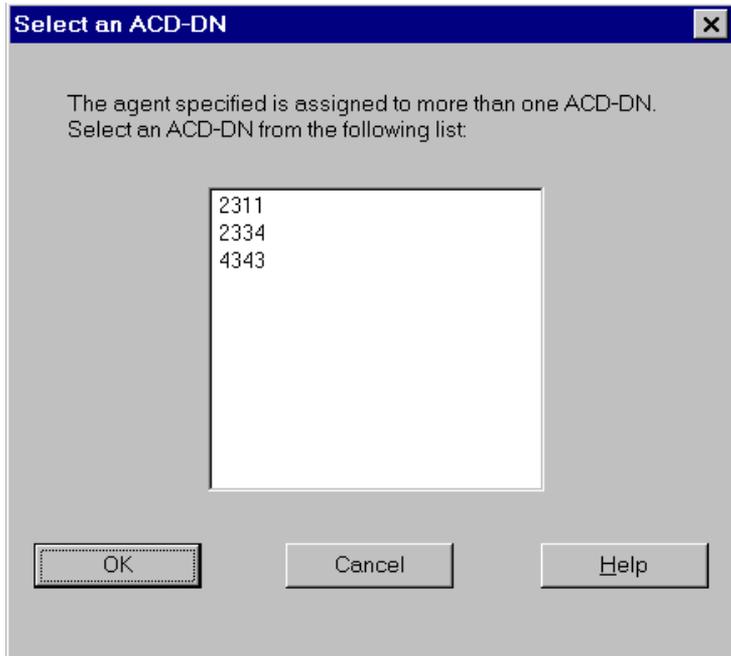
1. On the Real-time menu, click Locate Agent.  
*The Locate Agent submenu appears.*
2. On the Locate Agent submenu, click “by Position.”  
*The Locate Agent By Position ID window appears.*

# Monitoring agents

---



3. In the Position ID box, type the identification number of the position.  
*When MQA is enabled, it is possible to have an agent assigned to different ACD-DNs. If this occurs, a secondary menu of the matching ACD-DNs is presented.*



4. Select the ACD-DN from the list.
5. Click OK.

# Monitoring agents

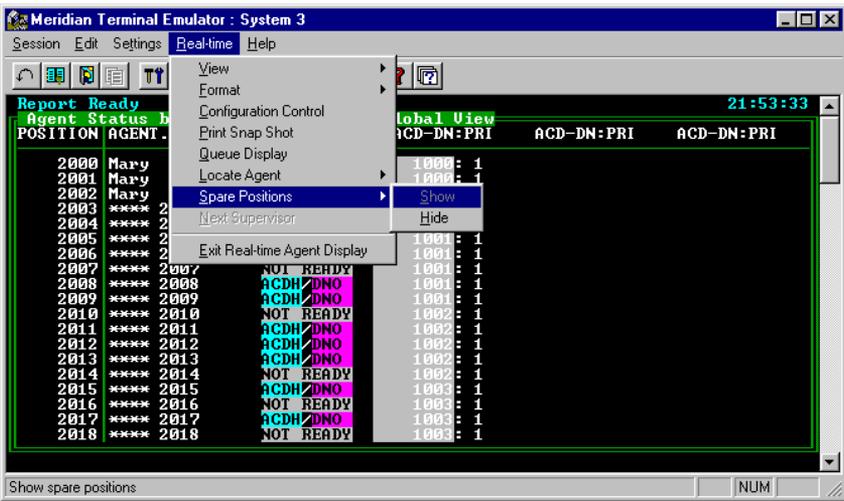
## To show spare agent positions

On the Real-time menu, you can show all the spare positions on the agent status displays. These are positions that do not have agents logged on.

To display the spare agent positions, follow these steps.

1. On the Real-time menu, click Spare Positions.

*The Spare Positions submenu appears.*



2. On the Spare Positions submenu, click Show.

*All of the spare positions appear. The Show option is not available if the spare positions are already shown on the display.*

# Monitoring agents

---

## To hide spare agent positions

On the Real-time menu, you can hide all the spare positions on the agent status displays. These are positions that do not have agents logged on.

To hide the spare agent positions, follow these steps.

1. On the Real-time menu, click Spare Positions.  
*The Spare Positions submenu appears.*
2. On the Spare Positions submenu, click Hide.  
*The spare agent positions are hidden on the display. The Hide option is not available if the spare positions are already hidden.*

## To view agents and queues for other supervisors

The Next Supervisor option allows you to monitor the queues and agents of other supervisors assigned to your supervisory group in your profile. You can only use this option if the *Group Member Definition* field is enabled in your profile and at least two supervisors are assigned to your supervisory group. The agent status display being viewed must also be in Supervisor View.

For more information on the Group Member Definition, refer to the *Meridian MAX 10 Supervisor's User Guide (553-4001-905)*, "Parameter Administration" chapter, "Supervisor Definition" section.

To use the Next Supervisor option, follow these steps.

1. Check that the agent status display is in Supervisor View.  
*The words "Supervisor View" appear in the title bar at the top of the display if you are in Supervisor View. If you are not in Supervisor View, follow the steps described in "To monitor agents by supervisor view" on page 32.*
2. On the Real-time menu, click Next Supervisor.  
*The agent data for the next supervisor in your group appears on the display.*

# Monitoring agents

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## To exit agent status displays

To exit the agent status display feature in MTE, follow this step.

1. On the Real-time menu, click Exit Real-time Agent Display.  
*The Meridian MAX main menu appears.*

## Changing the connection settings

---

This section describes how to change the settings used to connect to the Meridian MAX, CCR, or NAC.

### To change settings for the current session only

MTE allows you to make ad hoc changes to the address book entry currently in use. The changes are effective immediately. They remain effective, however, only for the current session. The changes are lost after you select another address book entry or terminate MTE.

1. On the Settings menu, click Edit Options.  
*The Options dialog box appears to display the connection settings for the address book entry currently in use.*
2. If you want to use another address book entry, select it from the Alias Name pull-down list.
3. Change the options.  
A description of the fields is embedded in the procedure on page 22.  
You cannot change the alias name of the address book entry from this screen. You can change it only by following the renaming procedure on page 26.
4. Click OK.  
*A pop-up dialog box appears asking if you want to update the address book.*
5. Click No.  
By selecting no, you indicate that the changes are to be applied to the current session only.

# Changing the connection settings

---

## To connect to more than one session

You can open more than one simultaneous Meridian MAX, CCR, or NAC supervisor session on your PC. The number of available sessions depends on the resources on your PC.

If you are using a LAN, each session that you start takes up a LAN session on your application. If you are using a serial port and you want to run Meridian MAX, CCR, or NAC simultaneously, you must set up a separate port for each application.

You require a unique ID for each MTE session connected to the same Meridian MAX.

1. Double-click the MTE icon.
2. If desired, change the connection settings in the Edit Options dialog box or the Address Book dialog box.
3. Wait for your PC to connect to the Meridian MAX, CCR, or NAC in the new session.
4. Log on to the application.
5. To start another session, repeat steps 1 to 4.

# Changing the connection settings

---

## To connect to a different application

You can connect to a different Meridian MAX, CCR, or NAC application without terminating your current MTE session. This can be done through the Options dialog box or the Address Book dialog box.

### From the Options dialog box

1. On the Settings menu, click Edit Options.  
*The Options dialog box appears.*
2. In the Alias Name box, select the alias name of the address book entry you want to use.
3. Click OK.
4. When prompted, click Yes or No to indicate whether you want to permanently save the changes.
5. Wait for your PC to connect to the Meridian MAX, CCR, or NAC in the new session.
6. Log on to the application.

### From the Address Book dialog box

1. On the Sessions menu, click Address Book.  
*The Address Book dialog box appears.*
2. Click the name of the address book entry you want to use.
3. Click Connect, or double-click the name of the address book entry.
4. Wait for your PC to connect to the Meridian MAX, CCR, or NAC in the new session.
5. Log on to the application.

# Restarting a session

---

## To restart a session

This section describes how to restart a Meridian MAX, CCR, or NAC supervisor session from within the MTE window.

**Note:** If you are connected to your application through a LAN, this procedure terminates the active supervisor session. Ensure that you have saved any changes you want to use in future supervisor sessions before restarting the session.

If you are connected to your application through a serial port or modem, this procedure is equivalent to redrawing your screen.

1. On the Session menu, click Restart, or click Restart on the MTE toolbar.  
*A pop-up window appears asking if you want to restart the session.*
2. Click Yes.

If you are connected to your application through a LAN, the active supervisor session is terminated.

If you are connected to your application through a serial port or a modem, the link is reconnected. Your supervisor screen disappears for approximately five seconds and reappears unchanged.

# Exiting MTE

---

## To exit MTE

This section describes how to exit MTE. You should log off your Meridian MAX, CCR, or NAC supervisor session before you perform this procedure.

**Note:** If you are connected to your application through a LAN, this procedure terminates the active supervisor session. Save any changes that you have made during the current supervisor session before you exit MTE.

1. Log off the Meridian MAX, CCR, or NAC.
2. On the Session menu, click Exit, or click Exit on the MTE toolbar.  
*A pop-up window appears asking if you want to exit MTE.*
3. Click Yes.

*The MTE window closes.*

## Losing a connection unexpectedly

If an MTE connection goes down unexpectedly, the system logs you off the current supervisor session.

This occurs if you are connected through

- a LAN
- a modem
- a serial (RS-232) port connected to Meridian MAX 8.6x or higher

## Saving to a file

---

This section describes how to save your Meridian MAX and NAC reports to a file that can be used in other applications.

When you save your reports to a file, they are saved sequentially in the subdirectory and file name specified in the *File* box in the Options dialog box. For example, if you enter c:\directory\file in the *File* box in the Options dialog box, your first report is saved as c:\directory\file.001. Successive reports are saved as c:\directory\file.002, c:\directory\file.003, and so on, until c:\directory\file.999 is reached.

If a report is sent after you reach 999, a message box appears telling you that each new report that is sent will overwrite the final report. At this point, you can either delete files from your subdirectory or specify a different file name. If you specify a different file name, ensure that the first eight characters of the new file name do not match the first eight characters of the old file name, or your new set of reports will overwrite your existing set of reports.

### File formats

If you save to a file using data stream reporting, the data is reformatted so that it can be read by third-party software, such as spreadsheet or database packages. In the file, specific delimiters that are recognized by third-party software are added to the format of the report. To use this file format, you must have data stream reporting enabled on your Meridian MAX or NAC.

If you save to a file using the Workforce Management Tool format, the data is reformatted so that it can be read by that software. Please refer to the documentation for your version of Workforce Management Tool to see if it supports this format.

If you save to a file without enabling data stream reporting or Workforce Management Tool reporting, the file is not formatted for use by third-party software, and it cannot be read in a text editor.

# Saving to a file

---

## To save to a file with data stream reporting

This procedure describes how to save a report to a file specified in the address book. The file can be used by third-party software applications.

**Note:** The MTE session associated with the printer must be up and running.

1. On the Sessions menu, click Address Book, or click Address Book on the MTE toolbar.

*The Address Book dialog box appears.*

2. Click the name of the address book entry you want to use.
3. Click Modify.
4. In the Printer Port area, select File.
5. In the File field, type the path and file name.
6. Click OK to return to the Address Book dialog box.
7. With the name of the address book entry still highlighted, click Connect.
8. Wait for the PC to connect to the Meridian MAX or NAC.
9. Press Control+P from any Meridian MAX or NAC supervisor screen.

*The Local Printer Control Window appears.*

## Saving to a file

---



- In the Printer Type field, press the Options function key.  
*The Printer Models pop-up window appears.*
- Select Data Stream.  
*The Printer Models pop-up window disappears.*
- In the Printer Name field, type a name.  
This should be a descriptive name (for example, Data Stream).
- Press the Commands function key.
- Select Save changes and exit.  
*A pop-up window appears asking you to confirm that you are about to add a local printer to the system.*
- Type Y.  
*A pop-up window appears informing you that the local printer is being added to the system.*

Any reports printed to the printer created in steps 10 to 14 are saved in the file specified in step 5. You can import this file into a third-party software package. Due to the delimiters added to the report file by data stream

## Saving to a file

---

reporting, the report appears in its original format when it is imported by the third-party software.

### To save to a file for MAXcaster

MTE allows you to send report data from the Meridian MAX to a file that is picked up by the MAXcaster forecasting tool.

While this option is selected, you cannot send reports to your printer. You must be running Windows NT to run both MAXcaster and MTE on your PC.

**Note:** The MAXcaster option is available only if MAXcaster is installed on your PC.

In this procedure, an existing address book entry is modified to use the MAXcaster option. This is only one approach. You can also create a new address book entry with the MAXcaster option enabled, or access the setting through the Options dialog box.

**Note:** The MTE session associated with the printer must be up and running.

1. On the Sessions menu, click Address Book, or click Address Book on the MTE toolbar.

*The Address Book dialog box appears.*

2. Click the name of the address book entry you want to use.
3. Click Modify.
4. In the Printer Port area, click MAXcaster.
5. Click OK to return to the Address Book dialog box.
6. With the name of the address book entry still highlighted, click Connect.
7. Wait for the PC to connect to the Meridian MAX.
8. Press Control+P from any Meridian MAX supervisor screen.

*The Local Printer Control Window appears.*

9. Ensure that Workforce Mgmt Tool is selected in the Printer Type field.
10. In the Printer Name field, type a name.

*This should be a descriptive name, for example, MAXcaster printer.*

11. Press the Commands function key and exit the Local Printer Control Window.

*Any reports printed to the printer created in steps 8 to 11 are saved in the MAXDATA subdirectory where the MAXcaster is installed.*

# Saving to a file

---

## To save to a file for the Workforce Management Tool

MTE allows you to send report data from the Meridian MAX to a file that is picked up by the Workforce Management Tool.

While this option is selected, you cannot send reports to your printer. You must be running Windows NT to run both MAXcaster and MTE on your PC.

**Note:** The MAXcaster option is available only if MAXcaster is installed on your PC.

In this procedure, an existing address book entry is modified to use the file option. This is only one approach. You can also create a new address book entry with the file option enabled, or access the setting through the Options dialog box.

**Note:** The MTE session associated with the printer must be up and running.

1. On the Sessions menu, click Address Book, or click Address Book on the MTE toolbar.

*The Address Book dialog box appears.*

2. Click the name of the address book entry you want to use.
3. Click Modify.
4. In the Printer Port area, click File.
5. In the File field, type the path and file name.
6. Click OK to return to the Address Book dialog box.
7. With the name of the address book entry still highlighted, click Connect.
8. Wait for the PC to connect to the Meridian MAX.
9. Press Control+P from any Meridian MAX supervisor screen.

*The Local Printer Control Window appears.*

10. Ensure that Workforce Mgmt Tool is selected in the Printer Type field.
11. In the Printer Name field, type a name.

*This should be a descriptive name, for example, Workforce printer.*

12. Press the Commands key and exit the Local Printer Control Window.

*Any reports printed to the printer created in steps 9 to 12 are saved in the file specified in step 5. This file can only be read using your Workforce Management Tool software. For more information, refer to your Workforce Management Tool software.*

# Copying text to the clipboard

---

## To copy text to the clipboard

This section describes how to copy a selection of text from your Meridian MAX, CCR, or NAC supervisor screen to your Windows clipboard. Once the text selection is in your clipboard, you can paste it into another application.

**Note:** MTE does not support copying graphics to your clipboard.

1. Click and drag your mouse over the text that you want to copy.

*The text is highlighted.*

1. On the Edit menu, click Copy, or click Copy on the MTE toolbar.

*The text is no longer highlighted. You can now paste the selected text into another application.*

## Printing a report

---

This section describes how to use MTE to print your Meridian MAX or NAC reports. This feature is not available when MTE is connected to the CCR.

You can print the following Meridian MAX or NAC reports from MTE:

- historical reports (tabular, graphical, and event log reports)
- system reports
- real-time display snapshots
- Configuration Control transaction logs
- configuration reports from the Meridian MAX Capacity Configurator (available in Meridian MAX only)

The reports are printed only if

- there is only one MTE session running on the PC,  
or
- there is more than one MTE session running on the PC, but all of the MTE sessions are connected through the LAN to a different Meridian MAX.

If the Windows printer associated with the MTE session is on, but the MTE session is not running, reports printed to this printer will be queued in MAX/NAC until the MTE session starts.

### To print reports with Meridian MAX 10 or NAC 2.5

If you have Meridian MAX 10 (or higher) or NAC 2.5, you can send reports to any printer supported by your PC. This can be a printer directly attached to the PC or accessible on a network.

**Note:** The MTE session associated with the printer must be up and running.

1. On the Session menu, click Print Setup, or click Print Setup on the MTE toolbar.  
*The Print Setup dialog box appears.*
2. Select the printer you want to use.  
The default is the Windows default printer.
3. To change any of the other settings in the Print Setup dialog box, refer to your Microsoft Windows user guide.
4. Click OK to return to the MTE window.

# Printing a report

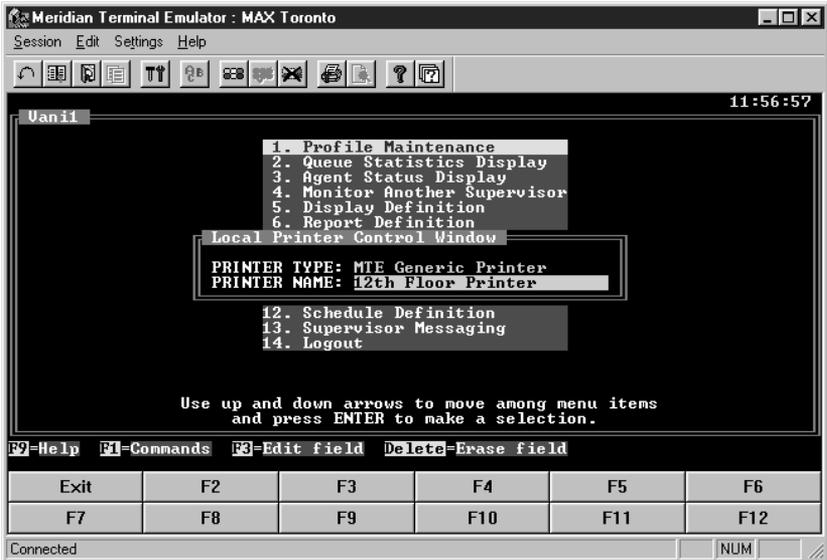
*The Print Setup dialog box closes.*

5. On the Settings menu, click Edit Options, or click Options on the MTE toolbar.

*The Options dialog box appears.*

6. In the Printer Port field, click Printer (if it is not already selected).
7. Click OK.
8. Close the Options dialog box:
  - If you modified the options and want to apply them to the address book entry, click Yes.
  - If you modified the options and want to apply them only to the current session, click No.
  - If no changes were made, close the Options dialog box.
9. Press Control+P from any Meridian MAX or NAC supervisor screen.

*The Local Printer Control Window appears.*



## Printing a report

---

10. In the Printer Type field, press the Options function key.  
*The Printer Models pop-up window appears.*
11. Select the MTE Generic Printer option.  
*The MTE Generic Printer option appears in the Printer Type field.*
12. In the Printer Name field, type a name for the printer.  
This should be a descriptive name, such as the name of the default printer.
13. Press the Commands function key.
14. Select Save changes and exit.  
*A pop-up window appears asking you to confirm that you are about to add a local printer to the system.*
15. Type Y.  
*A pop-up window appears informing you that the local printer is being added to the system.*
16. Create a report in Meridian MAX or NAC.  
For more information on creating a report in Meridian MAX, refer to the *Meridian MAX 10 Supervisor's User Guide* (NTP 553-4001-905), "Report Definition" chapter.  
For more information on creating a report in NAC, refer to the *Network Administration Center (NAC) 2 Supervisor's User Guide* (P0724352), "Network Report Definition" chapter.
17. On the Meridian MAX or NAC screen used to create the report, press the Commands function key.
18. Select Print this report.  
*The report is printed to the printer specified in the Print Setup dialog box.*

### To fix a printing problem

If you experience problems printing reports to a local printer, follow these steps.

1. Make certain only one MTE session is running on your PC.
2. Ensure that your printer is configured properly and is accessible from your PC.
3. Try sending the report to the local printer again.
4. If the problem persists, open the Session menu and click Reset Registry.  
*The system automatically resets the registry in your Windows operating*

## Printing a report

---

*system. For detailed information on the registry, refer to your Windows documentation.*

5. Try sending the report to the local printer again.
6. If the problem persists, contact your system administrator or Nortel Networks distributor.

## Previewing a report

---

This section describes how to preview a report in MTE before printing it.

The Print Preview option is available only if

- you are connected to Meridian MAX 10 or NAC 2.5
- a report, which has been generated in Meridian MAX or NAC, is ready to be previewed
- the report is targeted for the MTE Display

You can use MTE to preview reports generated through the Report Parameter Definition feature in Meridian MAX or NAC provided the output device is “MTE Display”.

For more information on this feature, refer to the *Meridian MAX 10 Supervisor's User Guide* (NTP 553-4001-905), “Report Definition” chapter, “Report Parameter Definition” section. For more information on creating a report in NAC, refer to the *Network Administration Center (NAC) 2 Supervisor's User Guide* (P0724352), “Network Report Definition” chapter.

An MTE sessions maintains only one preview report. If more than one MTE session is running on the PC, each session maintains its own preview report.

Unlike reports targeted on the Meridian MAX for screen display, reports targeted for viewing through MTE are destroyed when the MTE session terminates. When the MTE session restarts, you must regenerate these reports to preview them again.

When you select the Report Preview option from the Meridian MAX main menu, the preview report that was generated to the VDT appears.

If a new preview report is generated through MTE, the previous preview report is erased.

**Note:** This feature is not available when MTE is connected to CCR.

### To preview a report

1. On the Report Definition screen, create a report by defining the report parameters.
2. In the Output Device field on the Report Parameter Definition screen, press the Options function key.

*A pop-up window appears displaying available print options.*

## Previewing a report

---

3. Select MTE Display.

*The pop-up window closes.*

4. Press the Commands function key.

5. Select Print this report.

*When the report is ready to be previewed, the print preview icon becomes enabled on the MTE toolbar.*

6. On the Session menu, click Print Preview, or click Print Preview on the MTE toolbar.

*The report appears in the Print Preview window.*

Refer to your Microsoft Windows user guide for instructions on using the features in this window.

# Customizing programmable buttons

---

This section describes how to customize the MTE programmable buttons to automate actions in your Meridian MAX or CCR supervisor screens. With the press of one button, for instance, you can go directly from the Meridian MAX main menu to a frequently used screen.

You cannot program the buttons to execute MTE dialogs or pull-down menus. The buttons are also not available in NAC.

The changes made to the programmable buttons from one MTE session apply to all other sessions running on the same PC.

If you are upgrading from an MTE 7 or 8 version, the programmable buttons from that version are used in MTE 10 until you redefine them. If MTE 10 is a new installation or an upgrade from MTE 6 or lower, the system provides a default set of programmable buttons for the Meridian MAX screens. The following are the defaults:

<b>Button</b>	<b>Button name</b>	<b>Key sequence</b>
1	Exit	<F1>
2	F2	<F2>
3	F3	<F3>
4	F4	<F4>
5	F5	<F5>
6	F6	<F6>
7	F7	<F7>
8	F8	<F8>
9	F9	<F9>
10	F10	<F10>
11	F11	<F11>
12	F12	<F12>

# Customizing programmable buttons

---

## Applying buttons in Meridian MAX 10 or above

If you are using Meridian MAX 10 or above, you can program up to 12 different buttons on each screen. The buttons are defined for the screen currently being displayed in MTE. For example, if Meridian MAX screen “A” appears, the buttons defined in the Customize Buttons dialog box are loaded only when screen A appears. If screen B appears, you can program a new set of buttons. This feature is called context-sensitive programmable buttons.

If you have an MTE 10 directly connected to the Meridian MAX 10, the terminal type must be set to “MTE 9 or above” to use the buttons.

If MTE is connected through a LAN, it automatically creates the appropriate setting.

## Applying buttons in CCR

You can define a set of programmable buttons that are exclusively used when MTE is connected to a CCR host.

The same set of 12 CCR-specific programmable buttons is used by all CCR screens. You cannot program context-sensitive buttons for each screen.

To define the programmable buttons for CCR, MTE must be connected to a CCR host. These buttons are used if any of the following conditions are met:

- MTE is connected to CCR, and the emulation type in the Options dialog box is set to CCR
- the emulation type in the Options dialog box is set to CCR, and the MTE connection is being established
- the emulation type in the Options dialog box is set to CCR, and the MTE connection cannot be established due to errors

## Customizing programmable buttons

---

If MTE is a new installation, the system provides a default set of programmable buttons for the CCR screens. The following are the defaults:

<b>Button</b>	<b>Button name</b>	<b>Key sequence</b>
1	F1	<F1>
2	F2	<F2>
3	F3	<F3>
4	F4	<F4>
5	F5	<F5>
6	F6	<F6>
7	F7	<F7>
8	F8	<F8>
9	F9	<F9>
10	F10	<F10>
11	F11	<F11>
12	F12	<F12>

# Customizing programmable buttons

## To define buttons for Meridian MAX 10 and above

To help you program a button, an example is provided in this procedure. The example shows how to design a button to read an existing formula into the Formula Definition screen in Meridian MAX.

1. Check your terminal type:
  - If you are using Meridian MAX 10 or above and a serial port, set the terminal type to “MTE 9 or above.” Press Control+T on any Meridian MAX screen to check the terminal type.
  - If you are using a LAN connection, the terminal type is automatically set by MTE.
2. If your programmable buttons are not displayed on the bottom of your MTE window, on the Settings menu, click Programmable Buttons followed by Enable, or click Enable on the MTE toolbar.

*The programmable buttons appear at the bottom of the MTE screen.*



## Customizing programmable buttons

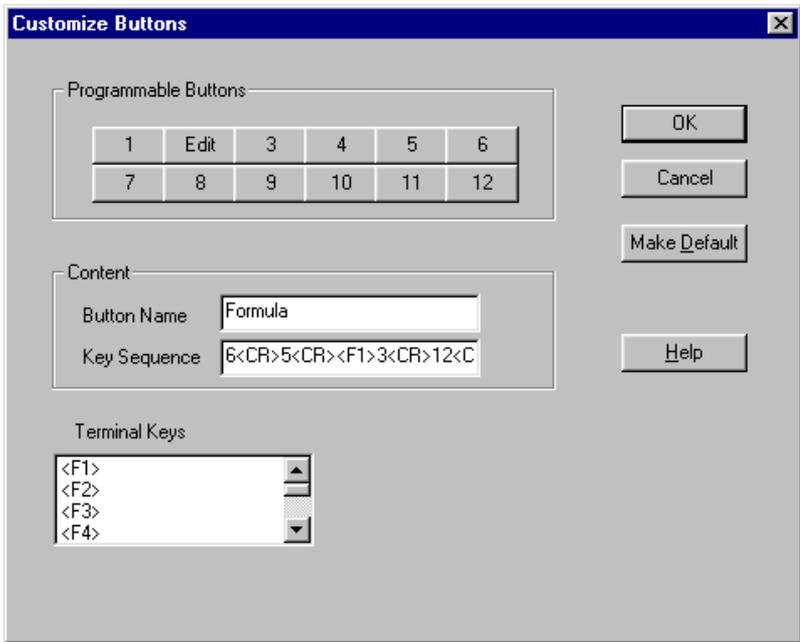
---

3. Go to the Meridian MAX screen with which you want to associate the programmable button.

**Example:** Display the Meridian MAX main menu.

4. On the Settings menu, click Programmable Buttons followed by Edit, or click Customize Buttons on the MTE toolbar.

*The Customize Buttons dialog box appears.*



5. In the Programmable Buttons area, click the button that you want to customize.

*The word Edit appears in place of the number of the programmable button. The button name and key sequence currently assigned to that button appear in the Content group box.*

**Example:** In the Programmable Buttons area, Button 2 is selected to be programmed. The Content area shows how the Button Name field and Key Sequence field appear when programming is complete.

# Customizing programmable buttons

---

6. In the Button Name field, type a name for the button.

The name can be a maximum of eight characters. This name appears when the programmable buttons are displayed in the MTE window.

**Example:** In the Button Name field, the name Formula is assigned.

7. In the Key Sequence field, type the key sequence that you want to automate. In the Terminal Keys pull-down list, double-click any key that you want to include in the sequence.

Use the characters <CR> to indicate a carriage return. You can select the carriage return symbol from the Terminal Keys pull-down list.

**Example:** The key sequence is 6<CR>5<CR><F1>3<CR>12<CR><F1>.

To enter this sequence, do the following:

ENTER      TO

6<CR>      Select the Report Definition feature on the Meridian MAX main menu. The Report Definition pop-up window appears.

5<CR>      Select the Formula Definition feature on the Report Definition pop-up window. The Report Formula Definition screen appears.

<F1>        Display the Commands window. The <F1> key should be selected from the Terminal Keys pull-down list.

3<CR>      Select the “Read an existing formula” option. The list of existing formulas appears.

12<CR>     Select the “Number of calls accepted” formula. This formula is Number 12. The formula appears on the screen.

<F1>        Close the Commands window. The <F1> key should be selected from the Terminal Keys pull-down list.

8. Repeat steps 5 to 7 to customize any other buttons for this screen.
9. Save your programmable buttons:

- If you want to use the new buttons for the current session, click OK. When asked if you want to save the buttons as the system default, click No.

*The Customize Buttons dialog box closes, and the buttons that you customized appear during the current session only.*

# Customizing programmable buttons

---

- If you want to use the new button as the system default, click Make Default.

*The Customize Buttons dialog box closes, and the buttons that you customized appear.*

10. Repeat steps 3 to 9 to assign buttons to other Meridian MAX screens.

## To define buttons for CCR

You can create only one set of programmable buttons in CCR. The same set of buttons is available for all the screens.

1. Navigate to any CCR screen.
2. If your programmable buttons do not appear on the bottom of your MTE window, click Programmable Buttons followed by Enable on the Settings menu, or click Enable on the MTE toolbar.

*The programmable buttons appear at the bottom of the MTE screen.*

3. On the Settings menu, click Programmable Buttons followed by Edit, or click Customize Buttons on the MTE toolbar.

*The Customize Buttons dialog box appears.*

4. In the Programmable Buttons box, click the button that you want to customize.

*The word Edit appears in place of the number of the programmable button. The button name and key sequence currently assigned to that button appear in the Content group box.*

# Customizing programmable buttons

---

5. In the Button Name field, type a name for the button.  
The name can be a maximum of eight characters. This name appears when the programmable buttons are displayed in the MTE window.
6. In the Key Sequence field, type the key sequence that you want to automate. In the Terminal Keys pull-down list, double-click any key that you want to include in the sequence.  
Use the characters <CR> to indicate a carriage return. You can select the carriage return symbol from the Terminal Keys pull-down list.
7. Repeat steps 4 to 6 to assign values to the buttons.
8. Save your programmable buttons:
  - If you want to use the new buttons for the current session, click OK. When asked if you want to save the buttons as the system default, click No.  
*The Customize Buttons dialog box closes, and the buttons that you customized appear during the current session only.*
  - If you want to use the new buttons as the system default, click Make Default.  
*The Customize Buttons dialog box closes, and the buttons that you customized appear.*

## To export programmable buttons

You can export a programmable button file from MTE and save it into a file. This file can then be imported to other PCs running MTE. You should not use other applications to alter the contents of the exported programmable buttons file.

**Note:** You must save a set of programmable buttons as the system default before it can be exported.

1. On the Session menu, click Export File.
2. On the Export File submenu, click Programmable Buttons.  
*The Save As dialog box appears.*
3. Assign the directory and file name to be used to store the programmable button file.
4. Click Save.  
*The programmable button file is saved. The system automatically formats the programmable button file for use exclusively by MTE.*

# Customizing programmable buttons

---

## To import programmable buttons

A set of programmable buttons can be imported and shared by other PC users running Microsoft Windows. Do not use other applications to alter the contents of a programmable buttons file.

You must use a programmable buttons file that has been exported from MTE on a PC.

1. Copy the exported programmable button file to your PC.
2. On the Session menu, click Import File.
3. On the Import File submenu, click Programmable Buttons.

*The Open dialog box appears.*

4. Locate the directory and folder containing the programmable buttons.
5. Highlight the programmable button file to be imported.
6. Click Open.

*The selected programmable button file is copied to MTE. If a programmable button file is already in use, a dialog box appears asking if you want to overwrite it with the imported file.*

7. Click Yes to confirm the import.

## Selecting your font settings

---

This section describes how to select the font settings used in your Meridian MAX, CCR, and NAC supervisor screens. The size of the window changes with the font size that you select. Based on the system fonts supported on your PC, you might also be able to select from the following fonts: Terminal, IBM PC, and 8514 OEM. The Terminal font is available on any PC.

**Note:** If you have more than one MTE session running on your PC, any change made to the font settings in one session is applied to all the other active MTE sessions.

### To select your own font settings

1. On the Settings menu, click Font.
2. On the Font submenu, click Select.  
*The Font dialog box appears.*
3. Select the font and size you want to use.  
Refer to your Microsoft Windows user guide for directions on using this screen.
4. Click OK to return to the MTE window.  
*The new settings are used in future Meridian MAX, CCR, and NAC supervisor sessions until they are changed.*

### To select the default font settings

To return to the system default font:

1. On the Settings menu, click Font.
2. On the Font submenu, click Default.  
*The font settings change to the default. The default font is used in future supervisor sessions until you select new settings.*

## Selecting your color settings

---

MTE allows you to access the Meridian MAX color customization feature while you are running Meridian MAX.

This feature gives you the ability to specify the colors for each display element on your Meridian MAX supervisor screens. For more information on customizing colors, refer to the *Meridian MAX 10 Supervisor's User Guide (NTP 553-4001-906)*, "Color Customization" chapter.

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## MTE User Guide

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