AVAYA

c o m m u n i c a t i o n

CentreVu® Supervisor

Version 9
Installation and Getting Started

Notice

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

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.

You and your system manager are responsible for the security of your system, such as programming and configuring your equipment to prevent unauthorized use. The system manager is also responsible for reading all installation, instruction, and system administration documents provided with this product in order to fully understand the features that can introduce risk of toll fraud and the steps that can be taken to reduce that risk. Avaya, Inc. does not warrant that this product is immune from or will prevent unauthorized use of common-carrier telecommunication services or facilities accessed through or connected to it. Avaya, Inc. will not be responsible for any charges that result from such unauthorized use.

Avaya, Inc. Fraud Intervention

If you suspect that you are being victimized by toll fraud and you need technical support or assistance, call Technical Service Center Toll Fraud Intervention Hotline at 1-800-643-2353.

Trademarks

- CentreVu is a trademark of Avaya, Inc.
- DEFINITY is a registered trademark of Avaya, Inc.
- INFORMIX is a registered trademark of INFORMIX Software, Inc.
- INTEL and Pentium are registered trademarks of Intel Corporation.
- Microsoft, MS, Windows, and NT are registered trademarks of Microsoft Corp.
- Sun and Solaris are registered trademarks of Sun Microsystems, Inc.
- SPARCserver is a registered of SPARC International licensed exclusively to Sun Microsystems, Inc.

All other product names mentioned herein are the trademarks of their respective owners.

Ordering Information

Call: Avaya, Inc. Publications Center
Voice: 1-800-457-1235
International Voice: +1-317-322-6416
Fax: 1-800-457-1764
International Fax: +1-317-322-6699
Write: Avaya, Inc. BCS Publications Center
2855 N. Franklin Road
Indianapolis, IN 46219
U.S.A.

Order: CentreVu Supervisor Version 9
Installation and Getting Started guide
Document No. 585-210-928
Comcode 108502170
Issue 2, April 2001

For additional documents, refer to the section entitled "Related Documents" in the Preface.

You can be placed on a Standing Order list for this and other documents you may need. Standing Order will enable you to automatically receive updated versions of individual documents or document sets, billed to account information that you provide. For more information on Standing Orders, or to be put on a list to receive future issues of this document, please contact the Avaya Inc. Publications Center.

Avaya, Inc. National Customer Care Center

Avaya, Inc. provides a telephone number for you to use to report problems or to ask questions about your call center. The support telephone number is 1-800-242-2121.

Document Support Telephone Number

Avaya, Inc. provides telephone numbers for you to use to report errors or to ask questions about the information in this document. The support telephone numbers are:
Voice: 1-888-584-6366 and
International Voice: +1-317-322-6848.

European Union Declaration of Conformity

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

EMC Directive 89/336/EEC
Low Voltage Directive 73/23/EEC

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

Disclaimer

Intellectual property related to this product (including trademarks) and registered to AT&T Corporation has been transferred to Avaya, Inc. Incorporated.

Any references within this text to American Telephone and Telegraph Corporation or AT&T should be interpreted as references to Avaya, Inc. Incorporated. The exception is cross references to books published prior to December 31, 1996, which retain their original AT&T titles.

Intellectual property related to this product (including trademarks) and registered to Lucent Technologies Inc. has been transferred or licensed to Avaya Inc.

Any reference within the text to Lucent Technologies Inc. or Lucent should be interpreted as references to Avaya Inc. The exception is cross references to books published prior to April 1, 2001, which may retain their original Lucent titles.

Avaya Inc. formed as a result of Lucent's planned restructuring, designs builds and delivers voice, converged voice and data, customer relationship management, messaging, multi-service networking and structured cabling products and services. Avaya Labs is the research and development arm for the company.

Warranty

Avaya, Inc. provides a limited warranty on this product. Refer to the "Limited use Software License Agreement" card provided with your package.

Client Software License Agreement

DEFINITIONS

[1] "You", "Your", or "Licensee" means the person or business entity who purchased this License to use this Client Software or for whom such License was purchased.

[1] "Client Software" means a software application that operates on a computer system that provides resources to Client Software.

[1] "Documentation" means the manual and any other printed material provided by Avaya Inc. with the Client Software.

[1] "License" means the License purchased and granted pursuant to this Agreement.

LICENSE AND PROTECTION

1. **License Grant**. Avaya Inc. grants to You, subject to the following terms and conditions, a nonexclusive, nontransferable right to use the Client Software on multiple single user devices, maximum simultaneous users of the Client Software being limited to the number Licensed and authorized by Avaya Inc.. THE SERVER SOFTWARE AUTOMATICALLY PREVENTS SIMULTANEOUS USE BY MORE THAN THE AUTHORIZED NUMBER OF USERS. Avaya Inc. reserves all rights not expressly granted to You.

2. **Protection of Software**. You agree to take all reasonable steps to protect the Client Software and Documentation from unauthorized copy or use. The Client Software source code represents and embodies trade secrets of Avaya Inc. and/or its licensors. The source code and embodied trade secrets are not licensed to You and any modification, addition, or deletion is strictly prohibited. You agree not to disassemble, decompile, or otherwise reverse engineer the Client Software in order to discover the source code and/or the trade secrets contained in the source code or for any other reason.

   To the extent that the Client Software is located in a Member State of the European Community and You need information about the Client Software in order to achieve interoperability of an independently created software program with the Client Software, You shall first request such information from Avaya Inc. Unless Avaya Inc. refuses to make such information available, You shall not take any steps, such as reverse assembly or reverse compilation, to derive a source code equivalent to the Client Software. Avaya Inc. may charge You a reasonable fee for the provision of such information.

3. **Copies.** You may make multiple copies of the Client Software, provided You do not receive any payment, commercial benefit, or other consideration for reproduction or use. You may not copy Documentation unless it carries a statement that copying is permitted. All proprietary rights notices must be faithfully reproduced and included on all copies.

4. **Ownership**. Ownership of, and title to, the Client Software and Documentation (including any adaptations or copies) remains with Avaya Inc. and/or its licensors.

5. **Restrictions**. You agree not to rent, lease, sublicense, modify or time share the Client Software or Documentation.

License Agreement

6. **Termination**. This Agreement shall automatically terminate if You breach any of the terms or conditions of this Agreement. You agree to destroy the original and all copies of the Client Software and Documentation, or to return them to Avaya Inc., upon Termination of this License.

LIMITED WARRANTY AND LIMITED LIABILITY

1. **Compatibility.** The Client Software is only compatible with certain computers and operating systems. THE SOFTWARE IS NOT WARRANTED FOR NONCOMPATIBLE SYSTEMS.

2. **Software**. Avaya Inc. warrants that if the Client Software fails to substantially conform to the specifications in the Documentations and if the Client Software is returned to the place from which it was purchased within one (1) year from the date purchased, then Avaya Inc. will either replace the Client Software or offer to refund the License Fee to You upon return of all copies of the Client Software and Documentation to Avaya Inc.. In the event of a refund, the License shall terminate.

3. **DISCLAIMER OF WARRANTIES.** Avaya Inc. makes NO WARRANTY, REPRESENTATION OR PROMISE NOT EXPRESSLY SET FORTH IN THIS AGREEMENT. AVAYA INC. DISCLAIMS AND EXCLUDES ANY AND ALL IMPLIED WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. AVAYA INC. DOES NOT WARRANT THAT THE CLIENT SOFTWARE OR DOCUMENTATION WILL SATISFY YOUR REQUIREMENTS OR THAT THE CLIENT SOFTWARE OR DOCUMENTATION ARE WITHOUT DEFECT OR ERROR OR THAT THE OPERATION OF THE SOFTWARE WILL BE UNINTERRUPTED. Some states or countries do not allow the exclusion of implied warranties or limitations on how long an implied warranty lasts, so the above limitation may not apply to You. This warranty gives You specific legal rights which vary from state to state.

4. **EXCLUSIVE REMEDY**. EXCEPT FOR BODILY INJURY CAUSED BY AVAYA INC.'S NEGLIGENCE, AVAYA INC.'S ENTIRE LIABILITY ARISING FROM OR RELATING TO THIS AGREEMENT OR THE CLIENT SOFTWARE OR DOCUMENTATION AND YOUR EXCLUSIVE REMEDY IS LIMITED TO DIRECT DAMAGES IN AN AMOUNT NOT TO EXCEED $10,000. AVAYA INC. SHALL NOT IN ANY CASE BE LIABLE FOR ANY SPECIAL INCIDENTAL, CONSEQUENTIAL, INDIRECT OR PUNITIVE DAMAGES EVEN IF AVAYA INC. HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. AVAYA INC. IS NOT RESPONSIBLE FOR LOST PROFITS OR REVENUE, LOSS OF USE OF THE CLIENT SOFTWARE, LOSS OF DATA, COSTS OF RECREATING LOST DATA, THE COST OF ANY SUBSTITUTE EQUIPMENT OR PROGRAM, OR CLAIMS BY ANY PARTY OTHER THAN YOU. Some states or countries do not allow the exclusion or limitation of incidental or consequential damages, so the above limitation or exclusion may not apply to You.

GENERAL CONDITIONS.

1. **Governing Law**. This Agreement shall be governed by, and interpreted in accordance with, the substantive laws of the State of New Jersey of the United States of America.

2. **Entire Agreement.** This Agreement sets forth the entire understanding and agreement between You and Avaya Inc. and may be amended only in a writing or writings signed by You and Avaya Inc. NO VENDOR, DISTRIBUTOR, DEALER, RETAILER, SALES PERSON OR OTHER PERSON IS AUTHORIZED TO MODIFY THIS AGREEMENT OR TO MAKE ANY WARRANTY, REPRESENTATION OR PROMISE WHICH IS DIFFERENT THAN, OR IN ADDITION TO, THE REPRESENTATIONS OR PROMISES OF THIS AGREEMENT ABOUT THE SOFTWARE.

3. **Export.** Licensee hereby agrees that it will not knowingly, directly or indirectly, without prior written consent, if required, of the Office of Export Licensing of the U.S. Department of Commerce, Washington D.C. 20230, export or transmit any of the Products to any group Q, S, W, Y, or Z country specified in the Export Administration Regulations issued by the U.S. Department of Commerce or to any country which such transmission is restricted by applicable regulations or statues.

4. **U.S. Government Restricted Rights**. Use, duplication, or disclosure by the United States Government is subject to restrictions as set forth in FAR 52.227-14 (June 1987) Alternate III (g)(3) (June 1987), FAR 52.227-19 (June 1987), or DFARS 52.227-7013 (c)(1)(ii) (June 1988), as applicable Contractor/Manufacturer is Avaya, Inc. 11900 North Pecos Street, Westminster, Colorado 80234.

5. **Assignment**. Avaya Inc. may without your consent or notice to You, assign this Agreement to an entity to which it transfers ownership of the Client Software. Upon the effective date of such assignment, You agree that Avaya Inc. shall be released and discharged from all obligations and liabilities under this Agreement.

License Agreement

Table of Contents

***CentreVu*
Supervisor**

CentreVu Supervisor

Preface

Overview

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

- Instructions for installing CentreVu Supervisor (referred to as Supervisor) on a local PC from a network server or CD-ROM

- Procedures for installing Supervisor to a Shared Network Drive

- Procedures for uninstalling Supervisor

- Instructions for using Supervisor

- Procedures for installing and using CentreVu Terminal Emulator

- Guidelines for responding to error messages that may be displayed while installing Supervisor or logging into the CentreVu Call Mangement System (referred to as CMS) server.

$\Longrightarrow$ **NOTE:**
CentreVu Terminal must be separately installed. It is not automatically installed with Supervisor Version 9.

The following sections are included in this Preface:

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

Audience

This document is intended for anyone who is installing the Supervisor software for use with the DEFINITY® Enterprise Communications Server (ECS) and the CMS. It assumes that you are familiar with your PC and the Microsoft Windows[*] 95[†] or Windows 98[‡], Windows NT[**] 4.0, Windows ME[††] or Windows 2000 operating systems, including standard Microsoft Windows conventions.

---

*Microsoft Windows is a trademark of Microsoft Corp.
†Windows 95 is a trademark of Microsoft Corp.
‡Windows 98 is a trademark of Microsoft Corp.
**Windows NT is a registered trademark of Microsoft Corp.
††Windows ME is a trademark of Microsoft Corp.

Contents of this document

The document is organized into the following chapters:

Chapter 1	**Introduction**

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

- The two methods of installation

- The items that are shipped to you in the Supervisor package

- The equipment that is required to run Supervisor

- The Helpline numbers

Chapter 2	**Installing CentreVu Supervisor on a local PC**

This chapter provides the procedures to install Supervisor from a CD-ROM or the network onto a PC that will not access Supervisor over the network.

Chapter 3	**Installing CentreVu Supervisor on a shared network drive**

This chapter provides the procedures to install Supervisor (executable and default files) to a shared read-only folder on the network server.

Chapter 4	**Uninstalling CentreVu Supervisor**

This chapter provides the procedures to uninstall Supervisor from a PC or network server.

Chapter 5   Getting started with CentreVu Supervisor

This chapter provides the procedures to start Supervisor, log into a CMS server, log out of a CMS server, and exit Supervisor. It also describes how to change your connection settings and provides information about getting help regarding the Supervisor product.

Chapter 6   Performing CentreVu CMS operations

This chapter describes how to use the windows that are displayed when you select an item from any Operations tab, including detailed information on the Actions menu items that are available in Operations input windows.

Chapter 7   Using CentreVu Supervisor reports

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

Chapter 8   Installing and using CentreVu Terminal

This chapter provides general information about the CentreVu Terminal application, including how to install it and how to set it up to connect to the CMS server.

Chapter 9   Troubleshooting

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

Conventions used in this document

The following conventions are used in this document:

Convention	Description
Bold text	Menu names, options, and icon names are shown in bold text. File names and locations of files are also shown in bold text. For example: Select **Save** from the **File** menu.
Initial Capital Letters	Names of windows and keyboard keys. For example: This field is in the Manual Login window.
Courier Text	Text you are asked to enter and system commands. For example: Enter `this command.`
< >	Variable text is marked by less-than/greater-than signs. For example: Couldn't create <filename>.
KEY+KEY	Key combinations for which you must press and hold down one key and then press another. For example: ALT+4.
Italic Text	References to other documents.
Quotation marks (" ")	Sections and chapters that are referenced. For example: See Chapter 1, "Introduction," for an outline of the information in this document.
Click and Double-click	References pushing button 1 (the left-most mouse button or primary button) one time or two times, respectively.
	When you are asked to click or double-click the mouse button, click button 1 unless button 2 (the right-most button on the mouse or secondary button) is specified.

Convention	Description
Microsoft Windows or Windows	These terms are used to refer to Windows 95 with Distributed Component Object Model (DCOM), Windows 98, Windows NT 4.0 with Service Pack 4 or higher, Windows 2000, or Windows Millenium Edition (ME) running on at least a Pentium[a] 150

a. Pentium is a registered trademark of Intel Corporation.

Related documents

The following documents include additional information about CMS or Supervisor:

- *CentreVu® Supervisor Version 5 User Guide,* 585-215-829

- *CentreVu® Call Management System Release 3 Version 9 Administration*, 585-214-015

- *CentreVu® Supervisor Version 9 Reports*, 585-210-929, Issue 2

- *CentreVu® Call Management System Release 3 Version9 Database Items and Calculations*, 585-210-945

- *CentreVu® Call Management System Custom Reports*, 585-215-822, Issue 2

- *Avaya Inc. Version 9 Call Center Change Description,* 585-215-942

- *CentreVu® Call Management System Release 3 Version 9 External Call History Interface*, 585-215-952

- *CentreVu® Advocate User Guide*, 585-215-953

- *CentreVu® Report Designer Version 9 User Guide*, 585-210-930, Issue 2

- *CentreVu® Call Management System Release 3 Version 9 Software Installation, Maintenance, and Troubleshooting*, 585-215-956

- *Sun SPARCserver Hardware Installation* documentation, connectivity diagrams, and maintenance and troubleshooting documentation

CentreVu
Supervisor

Introduction

Overview

This chapter includes the following sections:

About CentreVu Supervisor

The Avaya CentreVu® Supervisor (referred to as Supervisor) software is a graphical user interface to the Avaya CentreVu Call Management System (referred to as CMS) Release 3 Version 9 (R3V9), Release 3 Version 8 (R3V8) or Release 3 Version 6 (R3V6) software.

The Supervisor software runs on an Intel[*] 486-compatible processor (a Pentium processor is preferred) that is running one of the following Microsoft Windows[†] operating systems (see page 1-12 for more detailed requirements):

- Windows 95[‡] with Distributed Component Object Model (DCOM)
- Windows 98[**]
- Windows NT[††] 4.0 with Service Pack 4 or a newer service pack
- Windows 2000[‡‡]
- Windows Millennium Edition (ME)[***] running on at least a Pentium[†††] 150

---

* Intel is a registered trademark of Intel Corporation.
†Microsoft Windows is a trademark of Microsoft Corp.
‡Windows 95 is a trademark of Microsoft Corp.
**Windows 98 is a trademark of Microsoft Corp.
††Windows NT is a trademark of Microsoft Corp.
‡‡Windows 2000 is a trademark of Microsoft Corp.
***Windows ME is a trademark of Microsoft Corp.
††† Pentium is a registered trademark of Intel Corporation.

Languages supported by Supervisor

Supervisor is not supported for all languages of Microsoft Windows operating systems. For information about which versions of Supervisor are supported for which Microsoft Windows operating systems, see the following table (✔ indicates that the operating system is supported).

Table 1-1: Languages supported by Supervisor

Language	Microsoft Windows OS	English	Dutch	French	German	Italian	Portu-guese	Spanish	Japanese	Chinese
English	Windows 95	✔	✔	✔	✔	✔	✔	✔	✔	✔
	Windows 98	✔	✔	✔	✔	✔	✔	✔	✔	✔
	Windows NT 4.0	✔	✔	✔	✔	✔	✔	✔	✔	✔
	Windows 2000	✔	✔	✔	✔	✔	✔	✔	✔	✔
	Windows ME	✔	✔	✔	✔	✔	✔	✔	✔	✔
Dutch	Windows 95	✔	✔							
	Windows 98	✔	✔							
	Windows NT 4.0	✔	✔							
	Windows 2000	✔	✔							
	Windows ME	✔	✔							
French	Windows 95	✔		✔						
	Windows 98	✔		✔						
	Windows NT 4.0	✔		✔						
	Windows 2000	✔		✔						
	Windows ME	✔		✔						

Page 1 of 3

Table 1-1: Languages supported by Supervisor

Language	Microsoft Windows OS	English	Dutch	French	German	Italian	Portu-guese	Spanish	Japanese	Chinese
German	Windows 95	✔			✔					
	Windows 98	✔			✔					
	Windows NT 4.0	✔			✔					
	Windows 2000	✔			✔					
	Windows ME	✔			✔					
Italian	Windows 95	✔				✔				
	Windows 98	✔				✔				
	Windows NT 4.0	✔				✔				
	Windows 2000	✔				✔				
	Windows ME	✔				✔				
Portuguese	Windows 95	✔					✔			
	Windows 98	✔					✔			
	Windows NT 4.0	✔					✔			
	Windows 2000	✔					✔			
Spanish	Windows 95	✔						✔		
	Windows 98	✔						✔		
	Windows NT 4.0	✔						✔		
	Windows 2000	✔						✔		
	Windows ME	✔						✔		

Table 1-1: Languages supported by Supervisor

Language	Microsoft Windows OS	English	Dutch	French	German	Italian	Portu-guese	Spanish	Japanese	Chinese
Japanese	Windows 95	✔							✔	
	Windows 98	✔							✔	
	Windows NT 4.0	✔							✔	
	Windows 2000	✔							✔	
	Windows ME	✔							✔	
Chinese	Windows 95									✔
	Windows 98									✔
	Windows NT 4.0									✔
	Windows 2000									✔
	Windows ME	✔								✔

Page 3 of 3

About CentreVu CMS

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

Types of installation

This document discusses the following methods of installing Supervisor:

- Local installation. With this type of installation, all of the Supervisor software is installed locally on each PC from a CD-ROM or from a network server. When installing from the network, the network administrator first copies the Supervisor installation files to a shared installation folder that resides on the network. Then, the user runs a client setup from the installation folder to install Supervisor to disk space that is local to the PC. See Chapter 2, "Installing CentreVu Supervisor on a Local PC," for details.

- Shared network installation. With this type of installation, the Supervisor software is installed in a shared application folder on the network server, but user-specific files and logs are stored in a Supervisor folder on each user's PC or on the user's network drive. See Chapter 3, "Installing CentreVu Supervisor on a Shared Network Drive," for details.

Checking package contents

The Supervisor software package includes the items that are listed in the following table. Check the package contents to be sure that all items are included.

Table 1-2: Supervisor package contents

Item	Description
CentreVu Supervisor Software	CD-ROM
CentreVu® Supervisor Installation and Getting Started document	Document number 585-210-928, Issue 2

If either of the items is missing or damaged, contact your Avaya account team. For support outside of the United States, contact your Avaya representative or distributor.

Installation support

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

- System requirements in "What you need on your PC" on page 1-12.

- The online Help that is provided with the installation program. See "Online help" on page 1-10.

- The tips in the **readme.txt** file on the CD-ROM. Use an editor such as Microsoft Windows Notepad to read the file.

- The Install Status window. This window displays a list of all files that are installed for Supervisor Version 9. Review this list to see that all files were successfully installed.

- Chapter 9, "Troubleshooting"

If you have further questions, contact the Avaya National Customer Care Center on 1-800-242-2121. For support outside of the United States, contact your Avaya representative or distributor.

Tips

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

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

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

You can cancel the installation of Supervisor at any time by selecting Close from the control menu, pressing Alt+F4, or pressing the F3 key. You can also cancel the installation by selecting the Cancel button at the bottom of the installation screen. When you cancel an installation, the Supervisor installation program exits installation and removes any files that were built by the program during the incomplete installation.

Online help

Online Help is provided with Supervisor to assist you in installing and using the product. The online Help is divided into main categories or books. To see the categories that are available in Help, select the Contents tab on the Help Topics window, as shown below.

Help topics

Topics are the basic unit of an online Help system. Each Help book that is listed above contains a list of topics. Double-click the book name to list the related topics, which are represented by a question mark, as shown above under Database Items and Calculations.

Using Help

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

- Help contents. To display a list of the books and topics the Help system, select **Contents** from the **Help** menu on the Supervisor Controller Window.

- Help on open windows. With a window open, you can press the F1 key to get help on that window.

- Help on a specific topic. Select the **Find** tab from the **Help Topics** window to search for topics that contain a specific term or phrase.

- What's This? help. With a window open that displays the ? icon in the title bar, help topics are available for each area or individual item in the window. Click the icon, followed by the item or area on which you want help. You can also right-click certain items and select "What's This?"

Additional features, such as bookmarks, are available in the Supervisor Help system. For more information on using the standard Help features, see your Microsoft Windows documentation.

What you need on your PC

To install and run Supervisor, you need the following minimum configuration of hardware and software is recommended.

- A Pentium133-MHz processor (Pentium 150 for Windows ME).

  ### ⇒ NOTE:

  The minimum supported PC configuration is an Intel 486-compatible 66-MHz processor. Response time will be slower with this processor.

- A hard disk drive with 50 MB of free space. If you are installing Supervisor in more than one language, you also need an additional 5 MB of disk space for each installation of Supervisor in another language.

- A CD-ROM drive.

- A minimum of 32 MB RAM. If simultaneous Supervisor instances are running in the background, additional memory may be required to maintain acceptable performance.

- An SVGA monitor and adapter set to at least 800 x 600 x 256 colors graphics resolution.

- Windows 95 with DCOM, Windows 98, Windows NT 4.0 with Service Pack 4 or higher, Windows ME ona Pentium 150, or Windows 2000 operating system.

  ### ⇒ NOTE:

  If you are installing Supervisor on a Windows NT 4.0 operating system, you must first install the Microsoft Service Pack 4 or later version.

- A mouse that is compatible with the supported Microsoft Windows operating systems.

- For network connection:

  — A WinSock 1.1 compliant TCP/IP stack

  — An ethernet communications board.

- For serial connection:

  — A serial cable that is correctly wired to support hardware flow control and a 16550A UART communications port

  — An available COM port.

- For modem connection:

  — At least a 19.2 Kbps modem and a 16550A UART communications port. If the modem is external, the cable must be correctly wired to support hardware flow control.

Other requirements

In addition to the recommended hardware and software requirements, the following items affect Supervisor installation.

- If you are upgrading from Supervisor Version 1.0 or Version 5.0 and you are running Windows 3.1, Windows for Workgroups 3.11, or Windows NT 3.51, you must upgrade your PC operating system to Windows 95, Windows 98, Windows NT 4.0, Windows ME, or Windows 2000 before you can install Supervisor Version 9.

- If you are installing Supervisor on a Windows 95 or Windows 98 operating system that does not have Internet Explorer 4.0, you must install DCOM95 before installing Supervisor. To install DCOM95, run the dcom95.exe program that is located in the Dcom95 folder on your Supervisor CD-ROM, or in the Supervisor folder on the network server.

  ### ⇒ NOTE:

  DCOM95 requires that you reboot your PC, so you need to close any open applications before you run it.

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

  ### ⇒ NOTE:

  If you have Windows NT 4.0 without a Service Pack or if you have Service Pack 1 or Service Pack 2, you must install Service Pack 3 and then Service Pack 4. If you have Windows NT 4.0 with Service Pack 3, you must upgrade to Service Pack 4.

What you need for your CentreVu CMS server

To install and run Supervisor, you need the following CMS platform and version:

- A Sun[*] Ultra5, Sun E3000, or Sun E3500 computer with Solaris 8
- CentreVu CMS R3V9, R3V8, or R3V6 running on the Sun platform.

⇒ NOTE:

If you are upgrading from Supervisor 1.0 or 5.0, you must upgrade your CMS server before you upgrade Supervisor. When you log in to the CMS server, you must have both Supervisor Version 9 and CMS R3V9, R3V8, or R3V6 or the login fails and the system displays an error message. You are given the option to choose a version of CMS to use when you log in to Supervisor.

---

*Sun is a registered trademark of Sun Microsystems, Inc.

CentreVu CMS system capacities

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

Number of Supervisor windows allowed

Supervisor makes it possible for users to open as many as 12 windows simultaneously. This limit is set for each user by the CMS system administrator. Microsoft Windows that do not directly use CMS data, such as the color customization data, are not included in this limit. Also, windows that are open for applications other than Supervisor are not included in this limit.

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

Number of simultaneous instances allowed

With the recommended configuration listed in "What you need on your PC" on page 1-12, you can run as many as four simultaneous Supervisor instances. With an Intel 486-compatible processor, you are limited to one instance of Supervisor with one report.

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

The ability to run several instances of Supervisor and the performance of the Supervisor software in this situation depends on the memory and speed of the PC that you are using. It is also affected by any other applications that are running on the PC while Supervisor is in use. If simultaneous Supervisor instances are running in the background, the PC may require additional memory to maintain acceptable performance.

Number of PCs allowed to run Supervisor

The number of PCs that are running Supervisor is limited by the number of simultaneous users who are contracted for in the site-licensing agreement with Avaya. The CMS software counts the number of active Supervisor clients that are logged in and limits the number of simultaneous users to the number of logins that were purchased by the customer.

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

Performance

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

- The PC's configuration, processor speed, Level 2 cache, hard disk speed, and video RAM could affect the response time.

- If the Supervisor application is running simultaneously with other applications, performance of the Supervisor application could be affected by those other applications.

- Two or more Supervisor instances that are running simultaneously could result in slightly slower response time.

- If Supervisor is running in a LAN environment, Supervisor generates additional network traffic. For example, if 250 Supervisor instances are running two real-time reports each, Supervisor could require approximately 20% of the LAN's capacity. Therefore, ensure that your LAN is engineered appropriately.

- In a LAN environment, network backups can cause congestion on the network and adversely affect the network performance.

Reliability and availability

If serial links or LAN connectivity drop and you are logged in using the Automatic Login capability, Supervisor automatically attempts to restore the connection.

Security

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

CentreVu
Supervisor

Installing CentreVu Supervisor on a local PC

Overview

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

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

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

This chapter includes the following sections:

-
-
-

---

*Windows NT is a trademark of Microsoft Corp.

Installation procedures

Installing Supervisor over a network is a two-step process that consists of:

- Preparing the installation folder

- Installing Supervisor on each PC

Use these procedures to install Supervisor on a PC that will run the application from a local disk drive. If you are using the network to install Supervisor on each PC, start with "Preparing the network folder"below. If you are using the CD-ROM to install Supervisor on each PC, start with "Setting up the PC" on page 2-3.

$\Rightarrow$ **NOTE:**
For installation requirements, see "Other requirements" on page 1-13.

Preparing the network folder

This section describes how to set up the network folder that will house the Supervisor files for installation on individual PCs. After preparing the network folder, you will set up the PC and then install Supervisor.

To prepare the network folder:

1. At a PC that is connected to the network, insert the CentreVu Supervisor CD-ROM into the CD-ROM drive.

2. If AutoPlay is enabled on the PC, the CentreVu Supervisor Setup program starts automatically after you insert the CD-ROM into the drive. Select the **Cancel** button in the window that is displayed and continue with Step 3.

$\Rightarrow$ **NOTE:**

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

3. Open Microsoft Windows[*] Explorer.

4. Create a folder on the network drive, and record the path to the folder for later use.

---

*Microsoft Windows is a trademark of Microsoft Corp.

CentreVu Supervisor V9 Installation and Getting Started
Installing CentreVu Supervisor on a local PC
**Installation procedures**   **2-3**

5. Use the Copy command or the drag-and-drop method to copy the contents of the CD-ROM to the folder that you created in Step 4. Be sure to copy all of the files.

6. Verify that the network drive to which you copied the contents of the distribution medium is available to each PC that will be installing Supervisor from the network.

7. Continue with "Setting up the PC".

Setting up the PC

Complete these steps to install Supervisor on a PC.

1. Before starting the installation, close all programs that are running on the PC.

2. On the Supervisor distribution medium (CD-ROM or installation folder), locate and double-click the **Readme.txt** file to view last-minute installation tips for this Supervisor release.

   The readme.txt file displays in Microsoft Windows Notepad, as shown below:
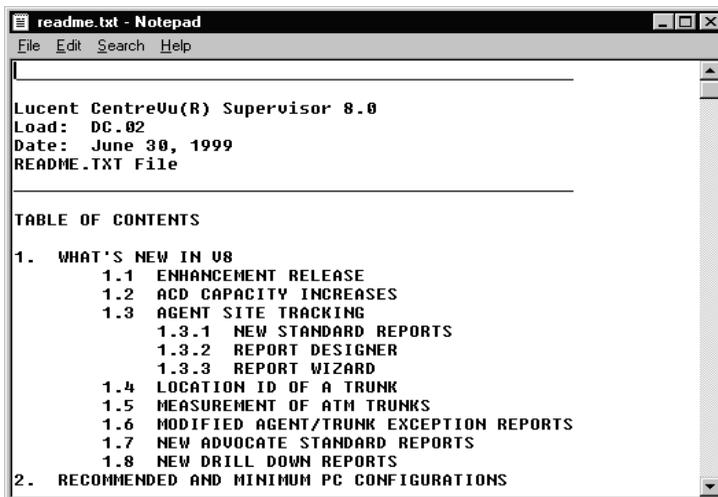
```
readme.txt - Notepad                                    _ □ ×
File  Edit  Search  Help

Lucent CentreVu(R) Supervisor 8.0
Load:  DC.02
Date:  June 30, 1999
README.TXT File


TABLE OF CONTENTS

1.   WHAT'S NEW IN V8
         1.1   ENHANCEMENT RELEASE
         1.2   ACD CAPACITY INCREASES
         1.3   AGENT SITE TRACKING
                  1.3.1   NEW STANDARD REPORTS
                  1.3.2   REPORT DESIGNER
                  1.3.3   REPORT WIZARD
         1.4   LOCATION ID OF A TRUNK
         1.5   MEASUREMENT OF ATM TRUNKS
         1.6   MODIFIED AGENT/TRUNK EXCEPTION REPORTS
         1.7   NEW ADVOCATE STANDARD REPORTS
         1.8   NEW DRILL DOWN REPORTS
2.   RECOMMENDED AND MINIMUM PC CONFIGURATIONS
```

3. Close the Notepad application to exit the readme.txt file.

CentreVu Supervisor V9 Installation and Getting Started
Installing CentreVu Supervisor on a local PC
Installation procedures   **2-4**

4. Perform one of the following actions:

   a. If you are installing from the CD-ROM and AutoPlay is enabled, insert the CD-ROM. Skip Step 5 through Step 9 and continue with Step .

   b. If you are installing from the CD-ROM and AutoPlay is not enabled, complete Step 5 and Step 6, insert the CD-ROM and then continue with Step 10.

   c. If you are installing from the network, complete Step 5, skip Step 6, complete Step 7, Step 8, and Step 9, and continue with Step 10.

5. From the Microsoft Windows **Start** menu, select **Run**.

   The system displays the Run window.

6. In the **Open** text box, enter the letter that designates the drive from which you are installing Supervisor, followed by **setup**, and then select **OK**. In the following example, the "c:" drive is selected.
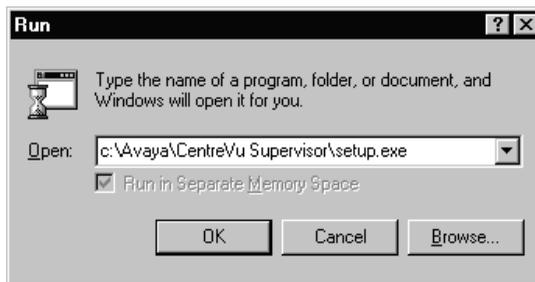
7. In the Run window, select the **Browse** button.

The system displays the Browse window.
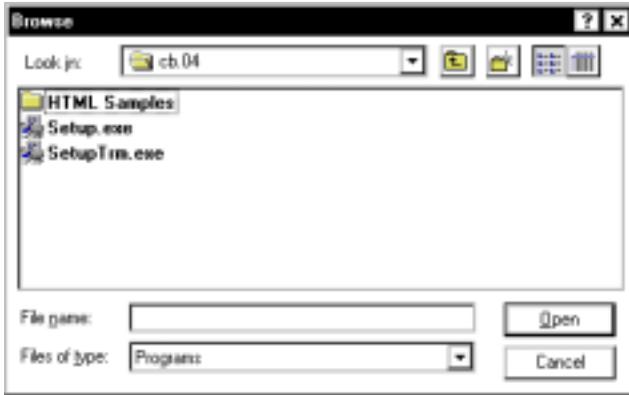
8. In the Browse window, navigate to the drive and directory that contain the Supervisor files.

⇒ NOTE:

If the drive that contains the Supervisor installation files is not mapped to the PC, you must map this drive now. To do this, open Microsoft Windows Explorer and select **Map Network Drive** from the **Tools** drop-down menu. Select any available drive letter and enter the appropriate description in the path field, for example, **\my_server\folder_name**.

9. Locate and double-click on the **setup.exe** file to begin the installation.

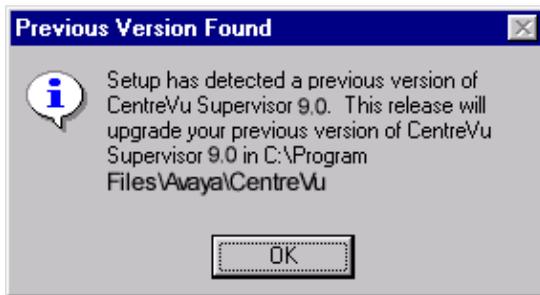   After a short wait, the system displays the Supervisor Installation Welcome window.

10. Select **Next**.

   Setup begins searching for a previous installation of Supervisor on your PC.

   The system displays the Type of Location window.
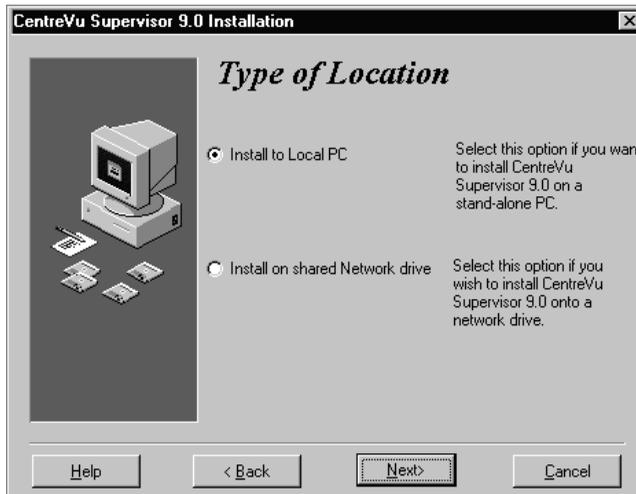
11. Select **Install to Local PC** to install Supervisor to a stand-alone client PC or on the client's own LAN drive.

12. Select **Next**.

    - If the system displays the Select Location window, it means that the setup program did not find any previous installation of Supervisor. Go to Step 21.

    - If the setup program finds a previous installation of Supervisor the system displays the Previous Version Found window. Continue with Step 13.

    Previous Version Found ⊠

    (i) Setup has detected a previous version of CentreVu Supervisor 9.0. This release will upgrade your previous version of CentreVu Supervisor 9.0 in C:\Program Files\Avaya\CentreVu

    [OK]

13. Select **OK** to continue with the installation.

14. Perform one of the following actions, depending on which version of Supervisor that the setup program finds:

    - If the system displays the Replace CentreVu Supervisor 5.0 window, it means that the setup program found an installation of Supervisor Version 5. Go to Step 15.

    - If the system displays the Replace CentreVu Supervisor 1.0 window, it means that the setup program found an installation of Supervisor Version 1. Go to Step 18.

    - If the system finds a previous installation of V6, V8, or V9 CentreVu Supervisor, you will be prompted to remove it or to install CentreVu Supervisor R9 as an upgrade, replacing the previous release. Continue with Step 21 or see *Chapter 4: Uninstalling CentreVu Supervisor* in this document.

15. The systems displays the Replace CentreVu Supervisor 5.0 window

16. Select one of the following:

    - **Replace Existing**. The setup program deletes the existing installation of Supervisor Version 5 and installs Supervisor Version 9 in its place.

    - **Keep Existing**. The setup program keeps the existing installation of Supervisor Version 5 and prompts you to install Supervisor Version 9 in a different folder.

    $\Longrightarrow$ **NOTE:**

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

17. Select **Next** and continue with Step 21.

18. The system displays the Replace CentreVu Supervisor 1.0 window

19. Select one of the following:

    - **Replace Existing**. The setup program deletes the existing installation of Supervisor Version 1 and installs Supervisor Version 9 in its place.

    - **Keep Existing**. The setup program keep the existing installation of Supervisor and prompts you to install Supervisor Version 9 in a different folder.

    $\Longrightarrow$ **NOTE:**

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

20. Select **Next**.

21. The system displays the Select Location window. If you are replacing the existing version of Supervisor, the Browse button is disabled.
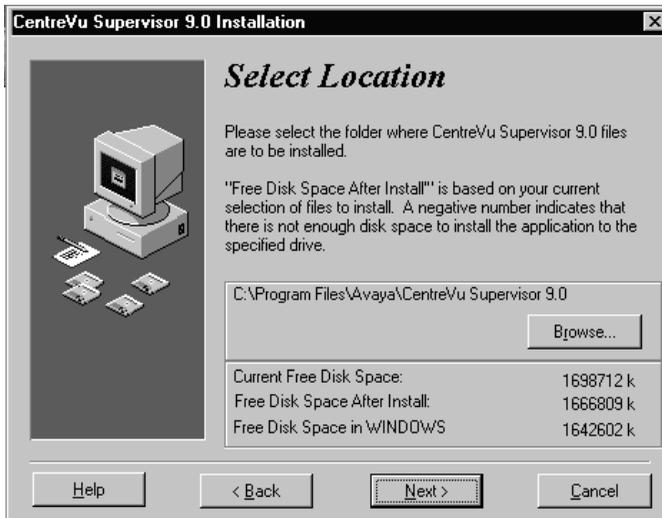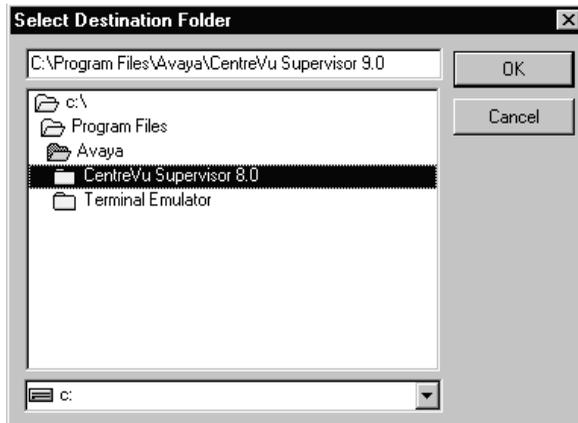

22. Make sure that you have enough disk space to install the application to the specified drive.

$\implies$ **NOTE:**

The numbers at the bottom of the window indicate the total space that is available on the specified drive and the total space that will be available after installation of Supervisor.

23. Perform one of the following actions, depending on where you want to install the Supervisor files:

- If you want to install the Supervisor files in the default installation path displayed, skip Step 24 through Step 26 and continue with Step 27.

- If you want to install the Supervisor files in a different drive or folder, continue with Step 24.

CentreVu Supervisor V9 Installation and Getting Started
Installing CentreVu Supervisor on a local PC
Installation procedures   **2-10**

24. Select the **Browse** button to display the Select Destination Folder window.


```
Select Destination Folder                        ☒
C:\Program Files\Avaya\CentreVu Supervisor 9.0        OK
  📂 c:\
    📂 Program Files                                  Cancel
      📂 Avaya
        ■ CentreVu Supervisor 8.0
        📁 Terminal Emulator




  🖳 c:                                          ▼
```

25. In the Select Destination Folder window, perform one of the following actions:

   - Navigate to the drive and folder where you want to install the files. Double-click the name of the folder to select it.

   - Type the name of the drive and folder where you want to install the files. If the folder does not exist, the Setup program creates it.

26. When you have selected the location, select **OK**.

   The system displays the destination path that you chose Select Location window.

27. Select **Next**.

The system displays the Type of Install window.
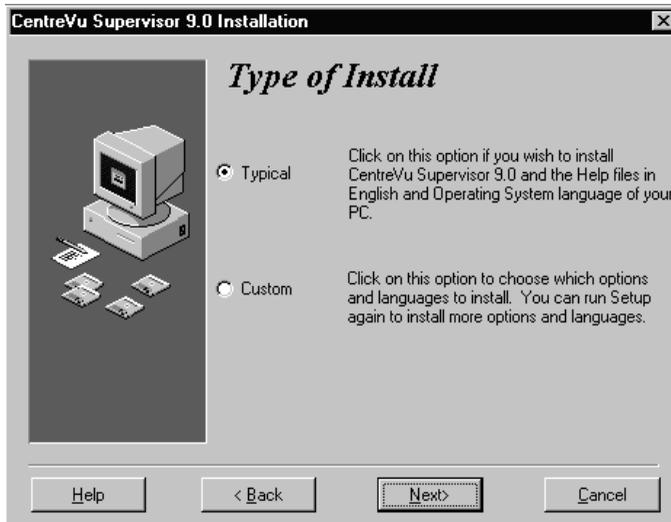
28. In the Type of Install window, select one of the following options and then the **Next** button.

- **Typical**. This selection installs all of the basic options in English, which is required, and all of the basic options in the language of your Microsoft Windows operating system. Skip Step 29 through Step 30 and continue with Step 31.

- **Custom**. This selection lets you choose which options and language versions to install. Continue with Step 29.

⇒ **NOTE:**

If you are performing a Supervisor Version 9 upgrade, you must also install all of the required languages. The Supervisor upgrade does not automatically reinstall the required languages.

29. If you select **Custom**, the system displays the Select Components window. Use this window to select the components and language versions that you want to install.
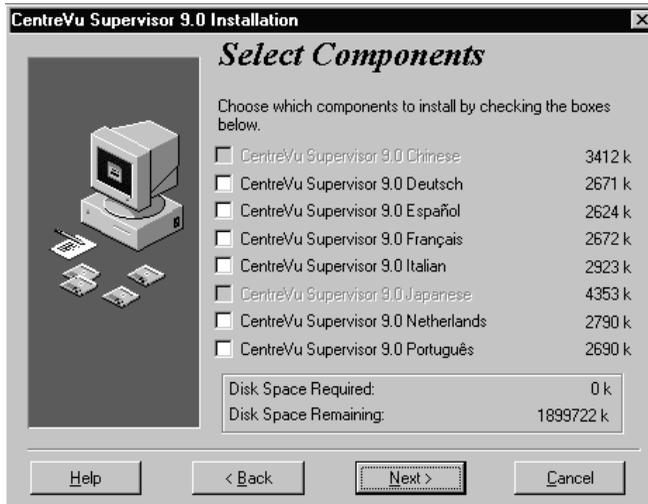
Before making your selections, read the bottom half of the window. It provides you with the following information:

- The total space that is required to install the options that you selected

- The total space that is available on the specified drive (both the destination drive and the drive on which Microsoft Windows exists).

30. Select the components in the list box that you want to install.

⇒ NOTE:

The English versions of Supervisor and online help are always installed. If you are running a supported nonEnglish version of Microsoft Windows, Setup installs Supervisor and online help in the language that matches your Microsoft Windows system. See page 1-3 for a table that lists the supported versions of Microsoft Windows and Supervisor in different languages.

CentreVu Supervisor V9 Installation and Getting Started
Installing CentreVu Supervisor on a local PC
Installation procedures   **2-13**

31. Select **Next**.

The system displays the Select Folder window.
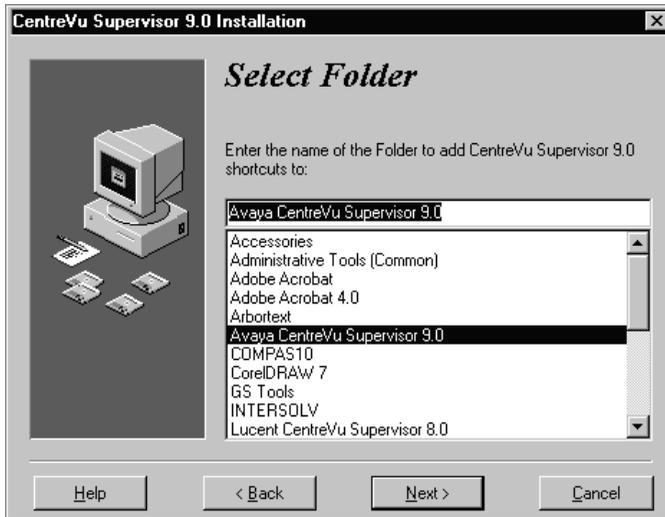
32. Perform one of the following actions, depending on the folder in which you want to put Supervisor shortcuts.

- Choose the default folder that is displayed.

- Type a different folder name in the text box. The Supervisor setup program creates the folder.

- Select a folder name from the list of existing groups.

33. Select **Next**.

The system displays the Ready to Install window.

34. Select **Install** to begin the installation.

The system displays a progress indicator that shows what percentage of the files are being installed.
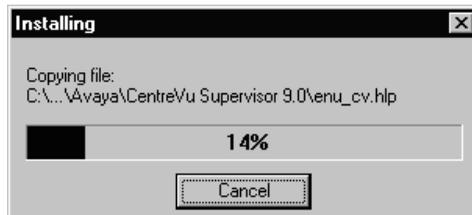
$\Longrightarrow$ NOTE:

The Install Status window displays a list of all files that are installed for Supervisor Version 9. Review this list to see that all files were successfully installed.

When the installation is complete, the system displays the Install Successful window.

35. Select **Finish** to return to your desktop.

Supervisor installation is complete.

Go to Chapter 5, "Getting Started with CentreVu Supervisor," for the procedures on establishing a connection to the CMS server.

CentreVu
Supervisor

Installing CentreVu Supervisor on a shared network drive

Overview

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

You must have administrator privileges to install Supervisor on a PC that is running Microsoft Windows NT[*] 4.0.

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

This chapter includes the following sections:

- "Installation procedures" on page 3-2
- "Network setup" on page 3-2
- "Client setup" on page 3-11

_____

*Windows NT is a trademark of Microsoft Corp.

Installation procedures

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

- Performing the network setup

- Performing a client setup at each client PC

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

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

$\Longrightarrow$ **NOTE:**
For installation requirements, see "Other Requirements" on page 1-13.

Network setup

To perform a network setup, you must first have administrative privileges on a workstation that is running Microsoft Windows[*].

To perform network setup:

1. Log into the PC as a user with administrative privileges.

2. Close all programs that are running on the PC.

3. Create a folder on the network drive to hold the Supervisor application files, and make it read-only and shared.

4. Verify that the network drive that contains the application folder is connected to each client PC.

---

*Microsoft Windows is a trademark of Microsoft Corp.

5. On the Supervisor distribution medium (CD-ROM or installation folder), locate and double-click on the **Readme.txt** file to view last-minute installation tips for this Supervisor release.

    The file displays in Microsoft Windows Notepad, as shown below:

6. Close the Notepad application to exit the readme file.

7. Insert the Supervisor CD-ROM into the CD-ROM drive. One of the following will occur:

    - If AutoPlay is enabled, setup starts automatically when you insert the CD-ROM. Skip Step 8 and Step 9 and continue with Step 10.

    - If AutoPlay is not enabled, proceed with Step 8.

8. From the Microsoft Windows **Start** menu, select **Run**.

   The system displays the Run window.

9. In the **Open** text box, enter the letter that designates the drive from which you are installing Supervisor, followed by **setup**, and then select **OK**. In the following example, the "d:" drive is selected.
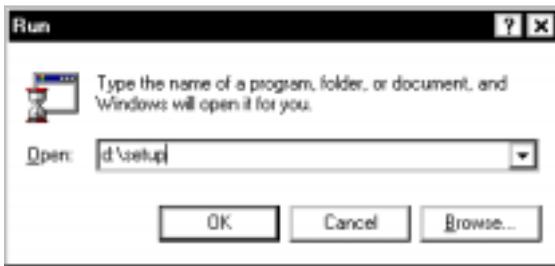
   You can also install Supervisor from an installation folder on the network drive. If the drive that contains the Supervisor installation files is not mapped to your PC, type the network path in the **Open** box of the Run window to map it to your PC.

10. After a short wait, the system displays the Supervisor Installation Welcome window.

11. Select **Next**.

The system displays the Type of Location window.
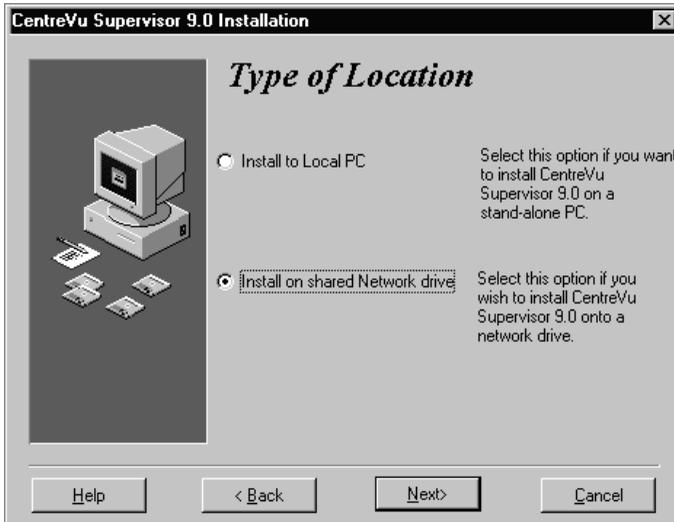
12. Select **Install on Shared Network Drive** to install the Supervisor application files to a folder on a shared network server.

13. Select **Next**.

The system displays the Select Network Location window.

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

14. Make sure that you have enough disk space to install the application to the specified drive.

    $\Rightarrow$ **NOTE:**

    The numbers at the bottom of the window indicate the total space that is available on the specified drive and the total space that will be available after installation of Supervisor.

15. Perform one of the following actions, depending on where you want to install the Supervisor files:

    • If you want to install the Supervisor files in the default installation path displayed, skip Step 15 through Step 17 and continue with Step 19.

    • If you want to install the Supervisor files in a different drive or folder, continue with Step 15.

16. In the Select Network Location window, use the **B**r**owse** option to display the Select Destination Folder window.
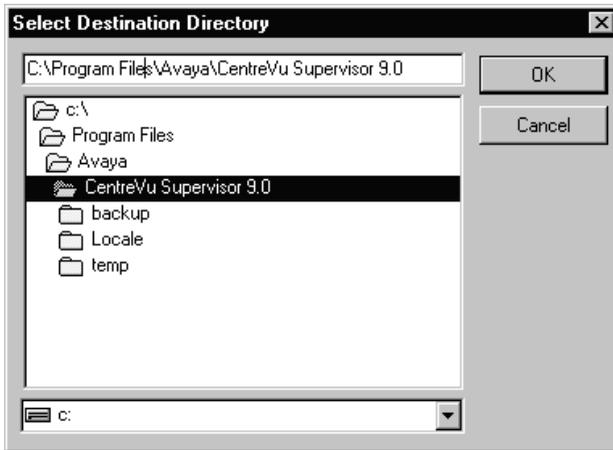
17. Navigate to the drive that contains the folder that you created in Step 3 and double-click the folder to select it.

$\Longrightarrow$ **NOTE:**
If you are performing a Supervisor upgrade, the upgrade must be installed in the same folder that contains the previous Supervisor Version 9 software. It is the system administrator's responsibility to make sure that the client's PC is mapped to the network drive and folder that contain the Supervisor Version 9 software.

18. Select **OK.**

The system displays the System Network Location window, which shows the drive and folder in which Supervisor will be installed.

19. Select **Next**.

The system displays the Ready to Install window.

20. Select **Install** to begin the installation.

The system displays a progress indicator that shows what percentage of the files are installed.
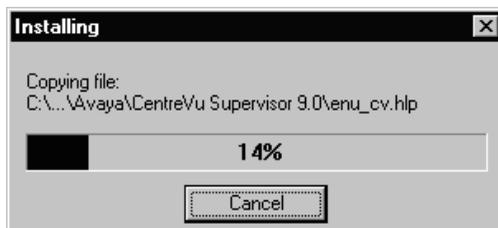
When the installation is complete, the system displays the Install Successful window.

Select **Finish** to return to your desktop.

Supervisor installation to the network drive is complete.

Client setup

The client setup program sets up the client computer to access Supervisor from the network server. Supervisor setup installs the application files on the network. Client setup installs the user-specific files that are needed to run Supervisor on the PC.

⟹ NOTE:
You must run client setup from the actual PC that the will be used to access Supervisor. If you just logon to the network as each user and then run client setup, the program does not install properly.

To set up a client PC:

1. Close programs that are running on the PC.

2. In Microsoft Windows Explorer or Network Neighborhood (Microsoft Windows 95 or 98, Microsoft Windows NT 4.0, Microsoft Windows ME or Microsoft Windows 2000), navigate to the directory where Supervisor is installed on the network.

3. Locate and then double-click the **setupclt.exe** file.

After a short wait, the system displays the Supervisor Installation Welcome window.

4. Select **Next**.

   Setup begins to search for a previous installation of Supervisor on the PC.

   - If the system displays the Select Destination Directory window, it means that the setup program did not find any previous installation of Supervisor. Continue with Step 13.

   - If the setup program finds a previous installation of Supervisor the system displays the Previous Version Found window.

   > **Previous Version Found** ✕
   >
   > (i) Setup has detected a previous version of CentreVu Supervisor 9.0. This release will upgrade your previous version of CentreVu Supervisor 9.0 in C:\Program Files\Avaya\CentreVu
   >
   > [OK]
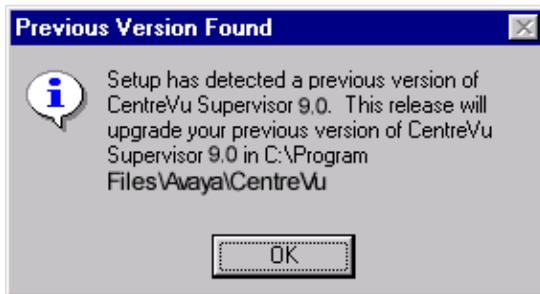
5. Select **OK** to continue with the installation.

6. Perform one of the following actions, depending on which version of Supervisor that the setup program finds:

   - If the system displays the Replace CentreVu Supervisor 5.0 window, it means that the setup program found an installation of Supervisor Version 5. Go to Step 15.

   - If the system displays the Replace CentreVu Supervisor 1.0 window, it means that the setup program found an installation of Supervisor Version 1. Go to Step 18.

   - If the system finds a previous installation of V6, V8, or V9 CentreVu Supervisor, you will be prompted to remove it or to install CentreVu Supervisor R9 as an upgrade, replacing the previous release. Continue with Step 13 or see *Chapter 4: Uninstalling CentreVu Supervisor* in this document.

7. The systems displays the Replace CentreVu Supervisor 5.0 window

8. Select one of the following:

    - **Replace Existing**. The setup program deletes the existing installation of Supervisor Version 5 and installs Supervisor Version 9 in its place.

    - **Keep Existing**. The setup program keeps the existing installation of Supervisor Version 5 and prompts you to install Supervisor Version 9 in a different folder.

    $\Longrightarrow$ **NOTE:**

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

9. Select **Next** and continue with Step 21.

10. The system displays the Replace CentreVu Supervisor 1.0 window

11. Select one of the following:

    - **Replace Existing**. The setup program deletes the existing installation of Supervisor Version 1 and installs Supervisor Version 9 in its place.

    - **Keep Existing**. The setup program keep the existing installation of Supervisor and prompts you to install Supervisor Version 9 in a different folder.

    $\Longrightarrow$ **NOTE:**

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

12. Select **Next**.

13. The system displays the Select Destination Directory window. If you are replacing the existing version of Supervisor, the Browse button is disabled.
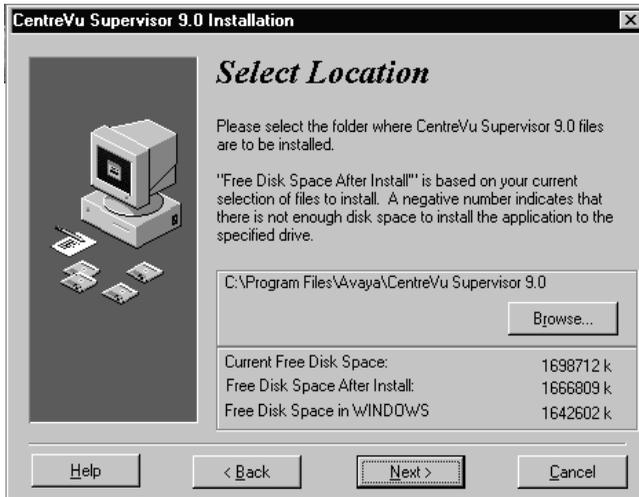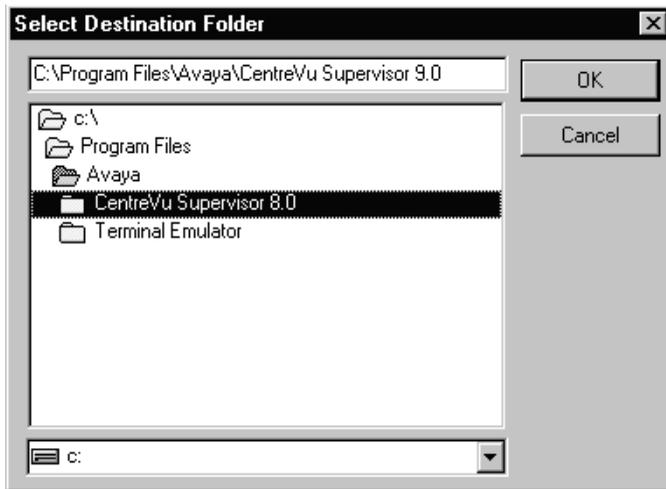

⇒ NOTE:

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

14. Perform one of the following actions, depending on where you want to install the Supervisor files:

   • If you want to install the Supervisor files in the default installation path that is displayed, skip Step 15 through Step 17 and continue with Step 18.

   • If you want to install the Supervisor files in a different drive or folder than the one that is displayed, continue with Step 15.

15. Select the **Browse** button to display the Select Destination Folder window.

Select Destination Folder

C:\Program Files\Avaya\CentreVu Supervisor 9.0

OK

Cancel

- c:\
  - Program Files
    - Avaya
      - CentreVu Supervisor 8.0
      - Terminal Emulator

c:

16. In the Select Destination Folder window, perform one of the following actions:

- Navigate to the drive and folder where you want to install the files. Double-click the folder to select it.

- Type the drive and folder where you want to install the files. If the folder does not exist, the Setup program creates it.

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

17. When you have selected the location, select the **OK** button.

The destination system displays the that path you chose in the Select Location window.

18. Select **Next**.

    The system displays the Type of Install window.
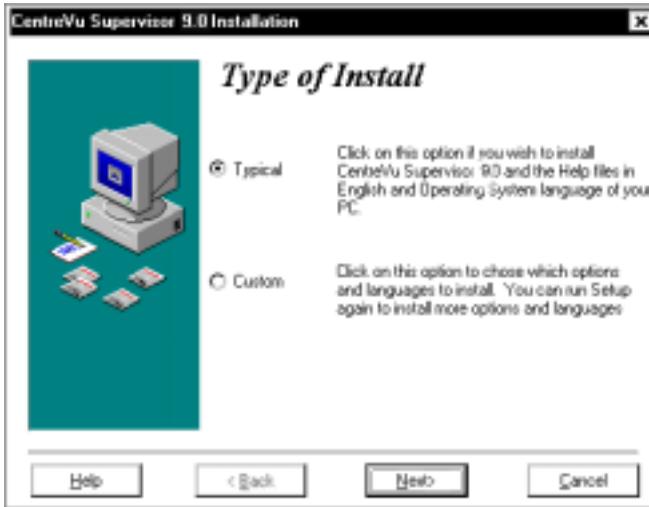
19. In the Type of Install window, select one of the following:

20. In the Type of Install window, select one of the following options and then the **Next** button.

    - **Typical**. This selection installs all of the basic options in English, which is required, and all of the basic options in the language of your Microsoft Windows operating system. Skip Step 21 and Step 22 and continue with Step 23.

    - **Custom**. This selection lets you choose which options and language versions to install. Continue with Step 21.

    $\Longrightarrow$ **NOTE:**

    > If you are performing a Supervisor Version 9 upgrade, you must also install all of the required languages. The Supervisor upgrade does not automatically reinstall the required languages.

21. If you selected **Custom**, the system displays the Select Components window. This window lets you select the components and language versions that you want to install.
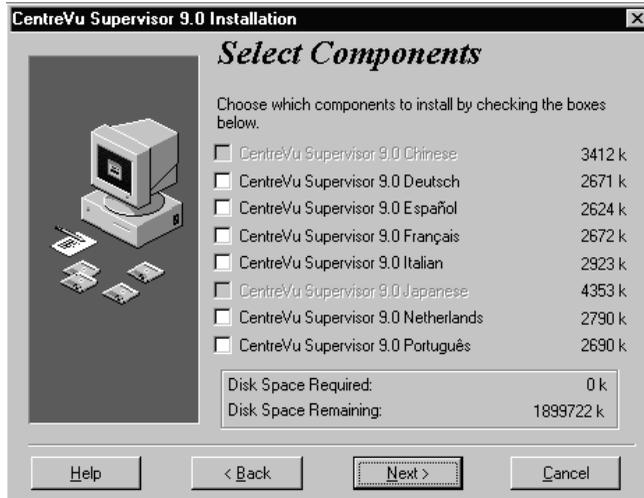
Before making your selections, read the bottom half of the window. It provides you with the following information:

- The total space that is required to install the options that you selected

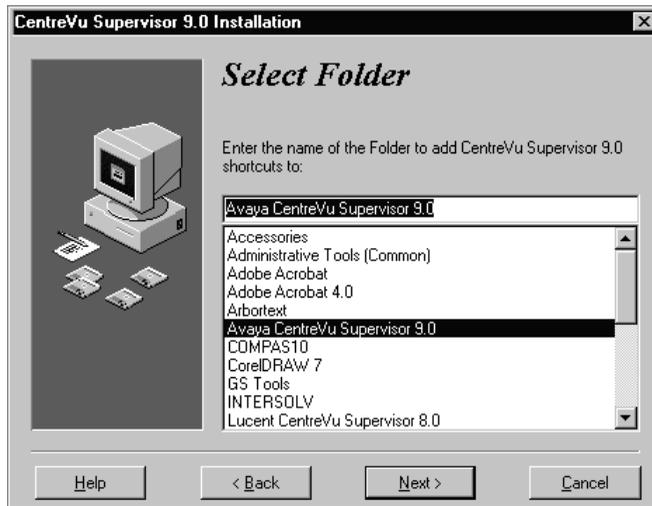- The total space that is available on the specified drive (both the destination drive and the drive on which Microsoft Windows exists).

22. Select the components in the list box that you want to install.

$\Longrightarrow$ **NOTE:**

The English versions of Supervisor and online help are always installed. If you are running a supported nonEnglish version of Microsoft Windows, Setup installs Supervisor and online help in the language that matches your Microsoft Windows system. See page 1-3 for a table that lists the supported versions of Microsoft Windows and Supervisor in different languages.

CentreVu Supervisor V9 Installation and Getting Started
Installing CentreVu Supervisor on a shared network drive
Installation procedures   **3-18**

23. Select **Next**.

The system displays the Select Folder window.

24. Perform one of the following actions, depending on the folder in which you want to put Supervisor shortcuts.

- Choose the default folder that is displayed.

- Type a different folder name in the text box. The Supervisor setup program creates the folder.

- Select a folder name from the list of existing groups.

25. Select **Next**.

   The system displays the Ready to Install window.

   ![Ready to Install window screenshot]

26. Select **Install** to begin the setup.

   The system displays a progress indicator that shows what percentage of the files are being installed.

   ![Installing progress window screenshot]
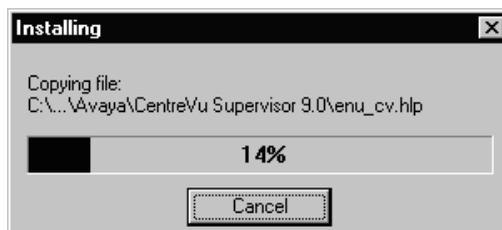
➯ NOTE:

   The Install Status window displays a list of all files that are installed for Supervisor Version 9. Review this list to see that all files were successfully installed.

When the installation is complete, the system displays the Install Successful window.

27. Select **Finish** to return to your desktop.

Supervisor installation is complete.

Go to Chapter 5, "Getting Started with CentreVu Supervisor," for the procedures on establishing a connection to the CMS server.

⇒ NOTE:
If you get a message that you need to restart your computer before running Supervisor, select **OK** to restart your computer.

*CentreVu
Supervisor*

Uninstalling CentreVu Supervisor

Overview

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

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

This chapter includes the following section:

-

---

*Microsoft Windows is a trademark of Microsoft Corp.

Performing the uninstall

To uninstall Supervisor:

1. Close all programs that are running on the PC.

2. From the Microsoft Windows **Start** menu, select **Settings** > **Control Panel**.

3. Double-click the **Add/Remove Programs** icon.

   The system displays the Add/Remove Programs Properties window.
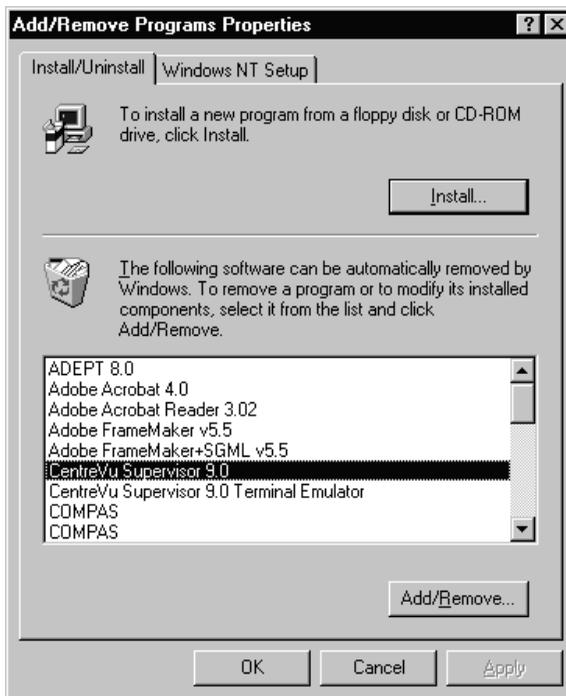
4. Select the **Install/Uninstall** tab.

5. Highlight **CentreVu Supervisor 9.0** in the list of installed software.

6. Select the **Add/Remove** button.

   The system displays the Remove CentreVu Supervisor 9.0? window.
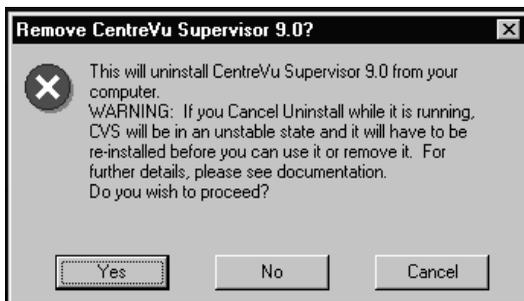
7. Select **Yes**.

   The system displays the Perform Uninstall window and a progress indicator that shows what percentage of the files are installed.
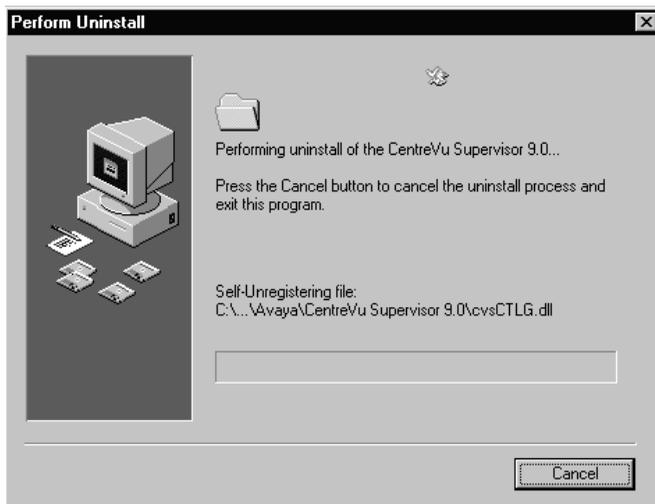
NOTE:

> If you press **Cancel** at this time, the system cancels the uninstall process. However, because some files have been deleted, Supervisor will not run. Also, the system prevents you from trying to uninstall Supervisor files a second time if you cancel the first attempt.

After the uninstall is complete, the system returns you to the desktop.

CentreVu
Supervisor

Getting started with CentreVu Supervisor

Overview

This chapter provides information on the main components of the Supervisor Controller window. It also provides procedures for common operations that you will perform in Supervisor. This chapter includes the following sections:

CentreVu Supervisor V9 Installation and Getting Started
Getting started with CentreVu Supervisor
Establishing CentreVu CMS server connection settings   **5-2**

Establishing CentreVu CMS server connection settings

> ⇒ **NOTE:**
>
> If you have already established connection settings, skip this section and continue with the following sections:
>
> -
>
> - .

You must establish connection settings in order to connect to the CMS server.

There are three connection options:

- Network

- Serial

- Modem.

There are two ways to set these options to connect to the CMS server:

- Automatic. To log in to the CMS server directly from Supervisor.

- Manual. To log in to the CMS server by way of the server's Solaris[*] system. You would use manual login for the following reasons:

  — You need to access cmssvc and cmsadm menus.

  — You are instructed to do so for troubleshooting.

  — Your version of Supervisor resides in a different Solaris system than the CMS server.

> ⇒ **NOTE:**
>
> For more information about your Solaris system, see your Solaris system administrator.

Now you are ready to open Supervisor and establish a connection to the CMS server. Continue with .

---

*Solaris is a registered trademark of Sun Microsystems.

CentreVu Supervisor V9 Installation and Getting Started
Getting started with CentreVu Supervisor
Establishing CentreVu CMS server connection settings   **5-3**

Opening the CentreVu Supervisor application

To open the Supervisor application:

1. From the Microsoft Windows* **Start** menu, select **Programs > Avaya CentreVu Supervisor 9.0**.

2. Select **CentreVu Supervisor-English** from the **Avaya CentreVu Supervisor** menu.

   At this point, the Supervisor application is open, but you are not logged in to the CMS server. If you have not yet established connection settings to a CMS server, the system displays the Supervisor Controller and an open Options window, as shown below.
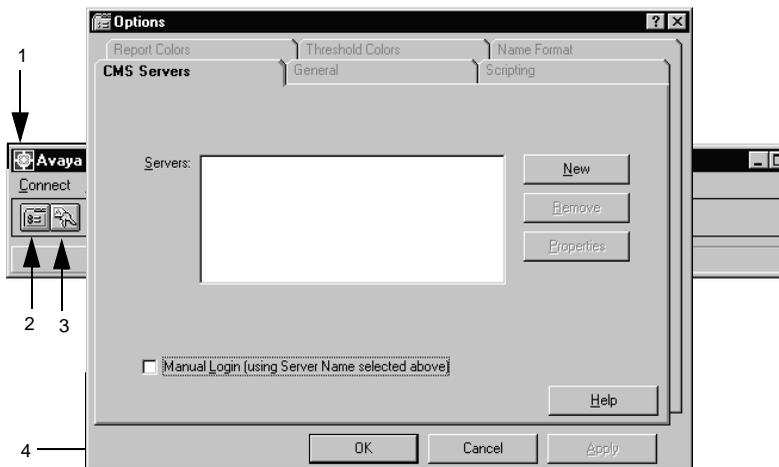
1. Supervisor controller
2. Options icon
3. Login icon
4. Options window

---

*Microsoft Windows is a trademark of Microsoft Corp.

CentreVu Supervisor V9 Installation and Getting Started
Getting started with CentreVu Supervisor
Establishing CentreVu CMS server connection settings   5-4

Establishing the connection

To establish connection settings to a CMS server, you must use the Options window. The Options window is displayed with the CMS Servers tab as the only active tab.
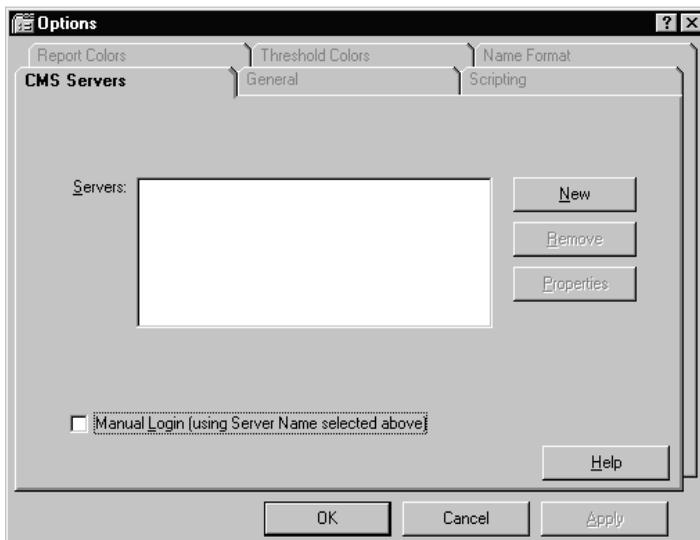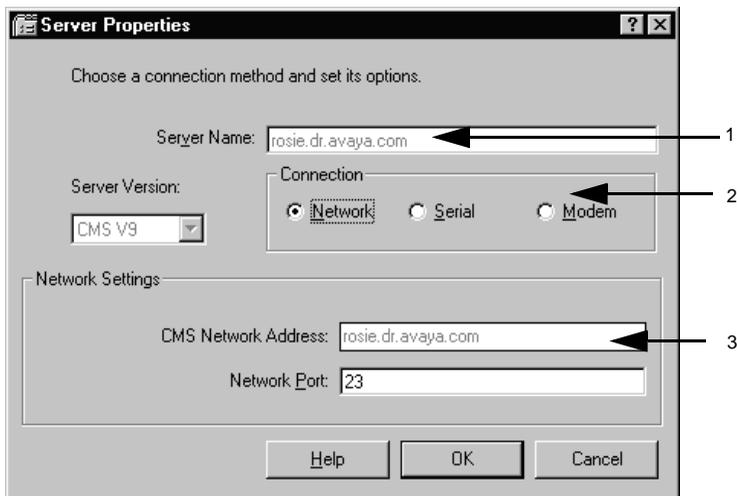

To establish a connection:

1. Perform one of the following actions, depending on how you want to connect to the CMS server:

    - If you want to connect manually, select the **Manual <u>L</u>ogin** check box.

    - If you want to connect automatically, do not select the **Manual Login** check box.

2. Since this is a new connection, select **<u>N</u>ew**.

    The system displays the Server Properties window.

3. Perform one of the following actions, depending on the type of connection that you want to establish:

    - For a Network connection, continue with "Network" on 5-5.

    - For a Serial connection, continue with "Serial on 5-7.

    - For a Modem connection, continue with "Modem" on 5-8.

CentreVu Supervisor V9 Installation and Getting Started
Getting started with CentreVu Supervisor
Establishing CentreVu CMS server connection settings 5-5

Network

When you select **New** in the Options window, the system displays the Server Properties window with the **Network** connection selected, as shown in the following figure.


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

To establish a network connection:

1. In the **Server Name** text box, type the name of the server that you will be using. As you type it, the system displays the **Server Name** in the **CMS Network Address** text box.

2. In the **Network Port:** text box, use the default of 23 unless otherwise instructed by your system administrator.

CentreVu Supervisor V9 Installation and Getting Started
Getting started with CentreVu Supervisor
Establishing CentreVu CMS server connection settings   **5-6**

3. Select **OK**.

The system displays the CMS Servers tab folder with the options that you chose.
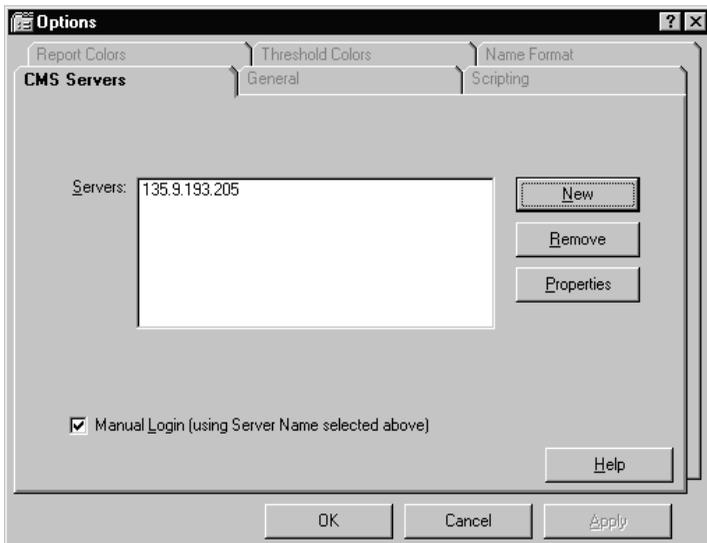
NOTE:

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

- **Remove**. Highlight the name of the server and select this option to remove the CMS server configuration that you entered previously. You will get a message asking if are sure you want to delete the server configuration. Select **Yes** or **No**.

- **Properties**. Highlight the name of the server and select this option to display the Server Properties window, where you can view or change the CMS server configuration properties.

4. Select **OK** to accept the Network settings. You have to select a server from the list before you select **OK**.
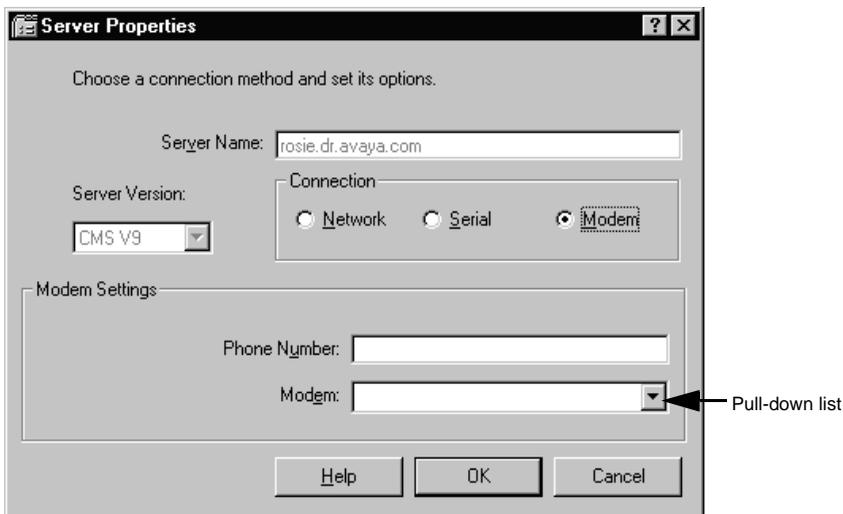
The system displays the Supervisor Controller window. At this point you are still not logged in to the CMS server, but you have established connection settings to the CMS server.

5. Continue with .

CentreVu Supervisor V9 Installation and Getting Started
Getting started with CentreVu Supervisor
Establishing CentreVu CMS server connection settings   **5-7**

Serial

When you select **New** in the Options window, the system displays the Server Properties window with the **Network** connection selected. Select **Serial** in the **Connection** box and the system displays the window as shown in the following figure.
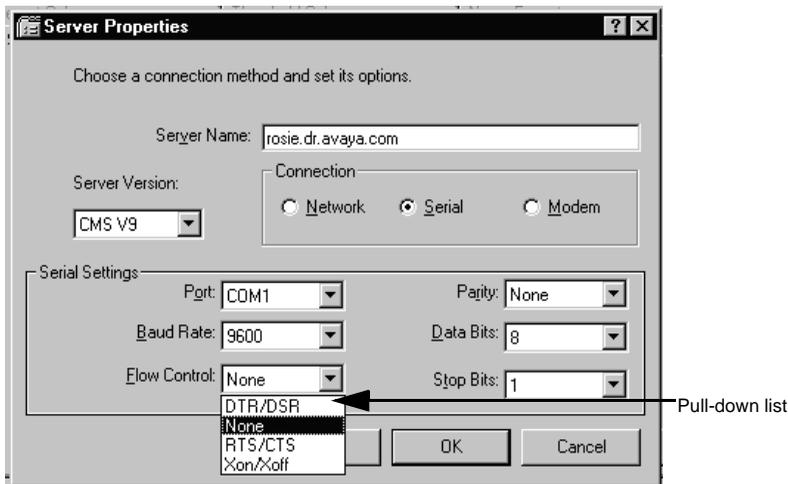
To establish a serial connection:

1. In the **Connection** box, select **Serial**.

2. In the **Server Name** text box, type the name of the server that you will be using.

3. In the **Serial Settings** box, enter all settings for the serial connection. Each setting has a list with various options as shown in the example above. See your CMS administrator for the appropriate serial settings.

4. When you finish entering the serial settings, select **OK**.

   The system displays the CMS Servers tab.

5. Select **OK** to accept the serial settings.

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

6. Continue with .

CentreVu Supervisor V9 Installation and Getting Started
Getting started with CentreVu Supervisor
Establishing CentreVu CMS server connection settings **5-8**

Modem

When you select **New** in the Options window, the system displays the Server Properties window with the **Network** connection selected. Select **Modem** in the **Connection** box and the system displays the window as shown in the following figure:

To establish a modem connection:

1. In the **Connection** box, select **Modem**.

2. In the **Server Name** text box, type the name of the server that you will be using.

3. In the **Phone Number** text box, type the telephone number of the CMS server. If you do not know the telephone number, contact your CMS administrator.

4. In the **Modem** box, select the modem from the pull-down list of modems that are configured in Microsoft Windows.

5. Select **OK.**

   The CMS Servers tab displays.

CentreVu Supervisor V9 Installation and Getting Started
Getting started with CentreVu Supervisor
Establishing CentreVu CMS server connection settings **5-9**

6. Select **OK** to accept the modem settings.

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

7. Continue with .

CentreVu Supervisor V9 Installation and Getting Started
Getting started with CentreVu Supervisor
Logging in to the CentreVu CMS server for the first time 5-10

Logging in to the CentreVu CMS server for the first time

After you establish connection settings to the CMS server, you can log in to the CMS server by using the **Connect** menu or using the **Login** icon, as shown in the following figure.

Connect menu   Login Icon
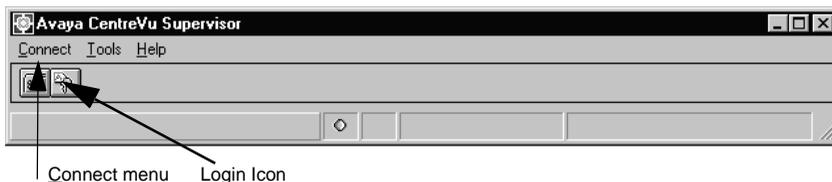
To log in to the CMS server for the first time:

1. Use one of the following methods to log in to the CMS server:

   • Select **Login** from the **Connect** menu.
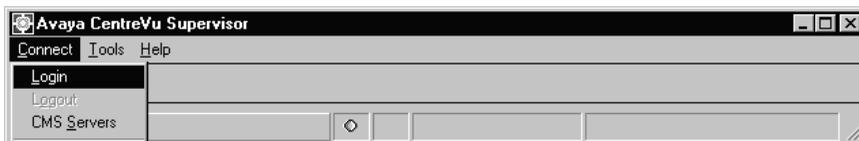
   • Click on the **Login** icon: .

   Depending on how you established connection settings to the CMS server, one of two actions will occur:

   • For an automatic login connection, the system displays the Login Information window. Continue with Step 3 through Step 6 in "Automatic login" on page 5-11.

   • For a manual login connection, the system displays the Manual Login window. Continue with Step 2 through Step 4 in "Manual login" on page 5-12.

CentreVu Supervisor V9 Installation and Getting Started
Getting started with CentreVu Supervisor
Logging into the CentreVu CMS server after first time 5-11

Logging into the CentreVu CMS server after first time

After you log in to Supervisor for the first time and establish your login ID and password, the login procedures change slightly. Follow the procedures below for automatic and manual login.

Automatic login

If the connection settings are established for automatic login, you will log in to the CMS server through the Automatic Login window. Now, each time that you open Supervisor, the system displays the Supervisor Controller window and the Login Information window.

To log into the CMS server using automatic login:

1. Double-click the **Supervisor** icon in its program group or on the desktop.

   The system displays the Supervisor Controller window with the Login Information window in front of the Controller, as shown in the following figure:
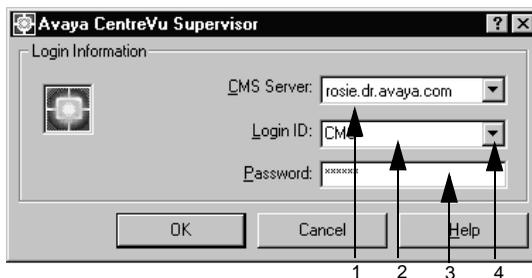
1. CMS server: text box
2. Login ID: text box
3. Password: text box
4. History list of Login IDs

2. From the **CMS Server** pull-down list, select the IP address of the CMS server.

3. Type your CMS login ID in the **Login ID**: text box, or choose it from the history list of IDs if it has been entered previously.

4. Press the **Tab** key to move to the **Password**: text box.

CentreVu Supervisor V9 Installation and Getting Started
Getting started with CentreVu Supervisor
Logging into the CentreVu CMS server after first time 5-12

5. Type your CMS password in the **Password**: text box.

6. Select **OK**.

    The system displays a message box that indicates that Supervisor is connecting to the CMS server.

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

    ## $\Rightarrow$ NOTE:

    For more information on the scripting feature, refer to Chapter 3, "Scripting," in the *CentreVu® CMS R3V9 Administration*, 585-214-015.

    See "Exploring the CentreVu Supervisor Controller" on page 5-19 for more information on using the Supervisor Controller window.

Manual login

If the connection settings are established for manual login, you will log in to the CMS server through the Manual Login window. Now, each time that you open Supervisor, the system displays the Supervisor Controller window and the Manual Login window.

$\Rightarrow$ NOTE:

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

CentreVu Supervisor V9 Installation and Getting Started
Getting started with CentreVu Supervisor
Logging into the CentreVu CMS server after first time 5-13

To log into the CMS server using manual login:

1. Double-click the **Supervisor** icon in its program group or on the desktop.

   The system displays the Supervisor Controller window with the Manual Login window in front of the Controller, as shown in the following figure. At this time, you are *not* logged in to the CMS server.
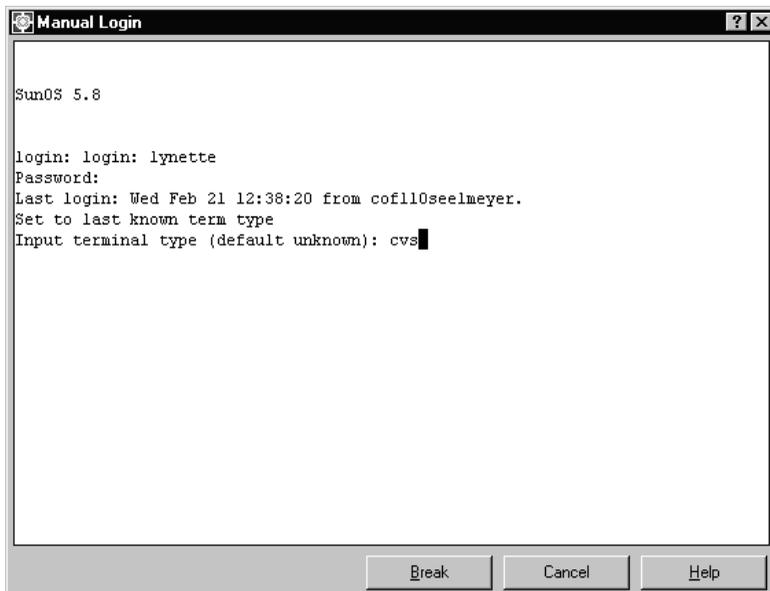
2. In the Manual Login window, at the login: prompt, enter your CMS Login ID.

   ## ➡ NOTE:

   The system displays the prompts only after you enter information for the previous prompt. All prompts are shown in the example of the Manual Login window for convenience.

3. At the Password: prompt, enter your CMS password.

CentreVu Supervisor V9 Installation and Getting Started
Getting started with CentreVu Supervisor
Logging into the CentreVu CMS server after first time   **5-14**

4. Perform one of the following actions, depending on which prompt that the system displays:

- If the system displays the Enter Terminal Type: prompt, enter **cvsup**.

- If the system displays the Solaris system prompt, enter **cms**.

The system displays the Supervisor Controller window.

Once you connect to the CMS server, the system displays the Supervisor Controller window with the CMS operations that are available on the toolbar. The status line is active and the system displays two new menus, **Co<u>mm</u>ands** and **<u>S</u>cripts**, in the menu bar.

⇒ **NOTE:**

For more information on the scripting feature, refer to Chapter 3, "Scripting," in the *CentreVu® CMS R3V9 Administration*, 585-214-015.

See "Exploring the CentreVu Supervisor Controller" on page 5-19 for more information on using the Supervisor Controller window.

CentreVu Supervisor V9 Installation and Getting Started
Getting started with CentreVu Supervisor
Logging off the CentreVu CMS server 5-15

Logging off the CentreVu CMS server

You can log off the CMS server by using the **Connect** menu, using the **Logout** icon, or using the **Exit** icon.

To log off the CMS server:

1. Use one of the following methods to log off of the CMS server:

   • Select **Logout** from the **Connect** menu.
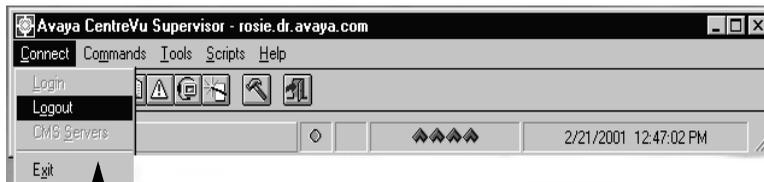
   Connect menu

   • Click the **Exit** icon , or from the **Connect** menu, select **Exit**. This logs you out of the CMS server and out of Supervisor.

   • Click on the **Logout** icon .

   The system asks you to verify whether you want to log out:
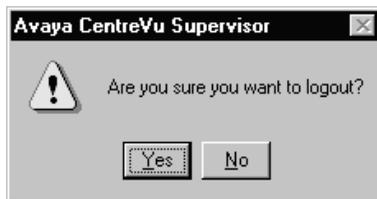
2. Select **Yes** to log off the CMS server.

   If you selected **Exit** in Step 1, Supervisor logs you out of CMS and closes the application.

   If you selected **Logout** in Step 1, Supervisor logs you out of CMS but the Controller window remains open. See "When you are not logged in to the CentreVu CMS server" on page 5-19 for details.

3. Continue with "Exiting Supervisor" on page 5-16.

Exiting Supervisor

To exit the Supervisor application:

1. From the **Connect** menu, select **Exit**.
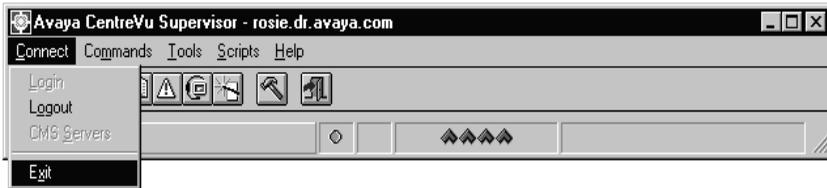
If you have logged off the CMS server, Supervisor closes.

If you have not logged off the CMS server, the system displays the following message:
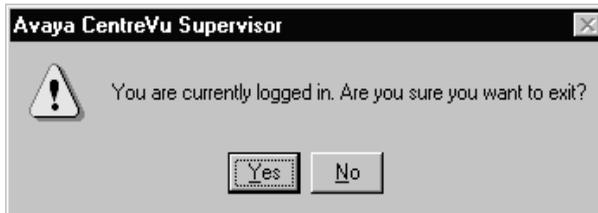
a. In response to the message, select one of the following:

- **Yes**. Supervisor automatically logs you off the CMS server and then exits from the application.

- **No**. You are returned to the Supervisor Controller window and remain logged in to the CMS server.

CentreVu Supervisor V9 Installation and Getting Started
Getting started with CentreVu Supervisor
Changing connection settings 5-17

Changing connection settings

To change connection settings to the CMS server:

➡️ NOTE:

You *cannot* be logged in to a CMS server when you change connection settings.

1. Open the Supervisor application.

2. Perform one of the following actions, based on which type of login you use:

   - If your connection to the CMS server is set for automatic login, select **Cancel** from the Login Information window to close it.

   - If your connection to the CMS server is set for manual login, select **Cancel** from the Manual Login window to close it.

   The system displays the Supervisor Controller window.

3. Open the Options window using one of the following methods:

   - From the **Tools** menu, select **Options...**.

   - Click on the **Options** icon:

   - From the **Connect** menu, select **CMS Servers**

   The system displays the Options window with the CMS Servers tab folder open.

CentreVu Supervisor V9 Installation and Getting Started
Getting started with CentreVu Supervisor
Changing connection settings   **5-18**

4. In the **CMS Servers** tab folder, select **Properties**.

    The system displays the Server Properties window. Notice that the **Server Name** is displayed and cannot be changed.
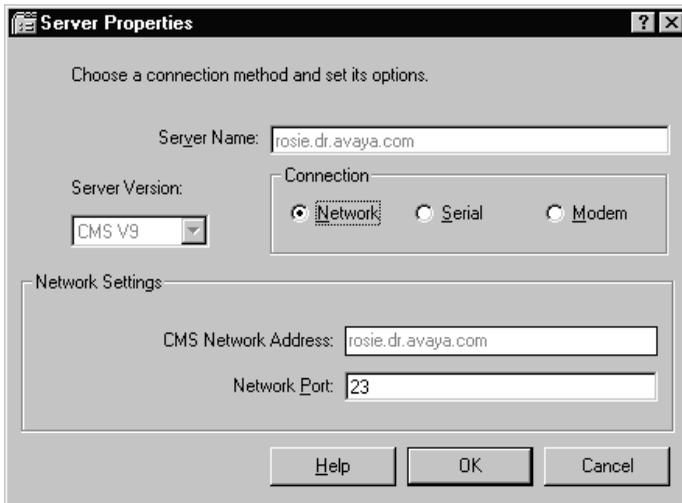
5. In the **Connection** box, click the type of connection you want, **Network**, **Serial**, or **Modem**.

    ⇒ **NOTE:**

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

6. Change any settings as needed.

7. Select **OK** to change the connection.

    The system displays the CMS Servers tab folder.

Exploring the CentreVu Supervisor Controller

The following sections explain the different parts of the Supervisor Controller window as it is displayed when you are not logged in to the CMS server and when you are logged in to the CMS server.

When you are not logged in to the CentreVu CMS server

This section describes the Supervisor Controller window as it is displayed when you are not logged in to the CMS server. The following figure illustrates the basic window:
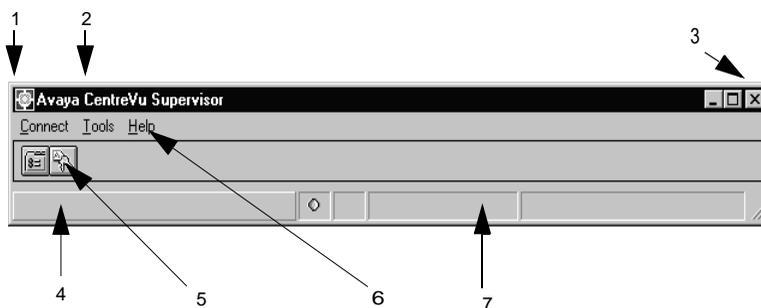
1. System menu box
2. Title bar
3. Maximize/minimize/close window sizing buttons
4. Status bar
5. Toolbar
6. Menu bar
7. Login status indicator

System menu box

The system menu box is a common Microsoft Windows convention. Use the system menu box to perform common windows operations, such as closing the current window or application.

Title Bar

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

Toolbar

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

Button	Name	Command
	<u>O</u>ptions	Accesses the window needed to change your login options.
	<u>L</u>ogin	Initiates a connection to the CMS server.

When you move your cursor over a toolbar button, the system displays a brief description of the command that the button performs. The system also displays a brief description of the command on the status bar.

Maximize, minimize, and close buttons

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

Status bar

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

Menu bar

The menu bar is a common Microsoft Windows convention that lists the available menus. When you are not logged in to the CMS server, the following menus are available:

Connect

Tools

Help

The following sections outline the options available from each menu.

Connect menu

From the **C**onnect menu, you can initiate or discontinue a connection to the CMS server. The **C**onnect menu has the options that are shown in the following figure and described in the following table:

Menu item	Action
Login	Selecting **Login** from the **Connect** menu displays the Manual Login window if the Manual Login Option is set, and displays items in the Automatic Login window if the Manual Login Option is not set.
CMS Servers (No Icon)	Selecting **CMS Servers** from the **Connect** menu opens the CMS Service tab in the Options window. When you are not logged in to the CMS server, the CMS Service tab allows you to select network, serial, and modem settings.
Exit (No Icon)	Selecting **Exit** from the **Connect** menu closes the Supervisor application.

Tools menu

The **Tools** menu has the options that are shown in the following figure and described in the following table:

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

Help

You can access Supervisor online help from all windows by doing any of the following:

- Pressing **F1** (Help) displays help that is specific to the current window.

- Selecting the **Help** button (if available) displays help that is specific to the current window.

- Selecting **Help** from the menu bar (shown below) offers you the options that are shown in the following figure an described in the following table:
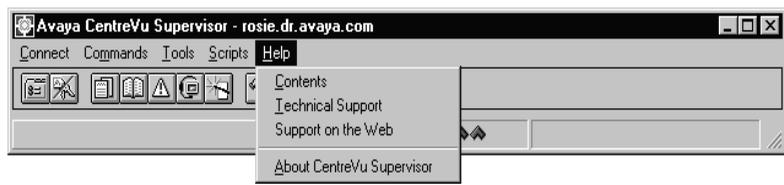
Menu item	Action
Contents	Selecting **Contents** opens the Supervisor online help table of contents.
Technical Support	Selecting **Technical Support** opens a window that provides Technical Support information.
About CentreVu Supervisor	Selecting **About CentreVu Supervisor** opens the Supervisor Help About window, which shows the software version number.

A style of help that is called "What's This?" is available in some windows. When you select the [?] icon on a title bar, the system displays a Help topic with information about the area of the window to which the mouse cursor is pointing. You can also click the right mouse button when the cursor is pointing to an area on the window and select the "What's this?" item that is displayed.

When you are logged in to the CentreVu CMS server

This section describes the Supervisor Controller window as it is displayed when you are logged in to the CMS server. The following figure illustrates the basic window:

1. Title bar
2. Menu bar
3. Toolbar
4. Status line
5. Login status indicator
6. Exception count
7. ACD status indicator(s)
8. CMS date and time
9. Minimize button
10. Maximize button
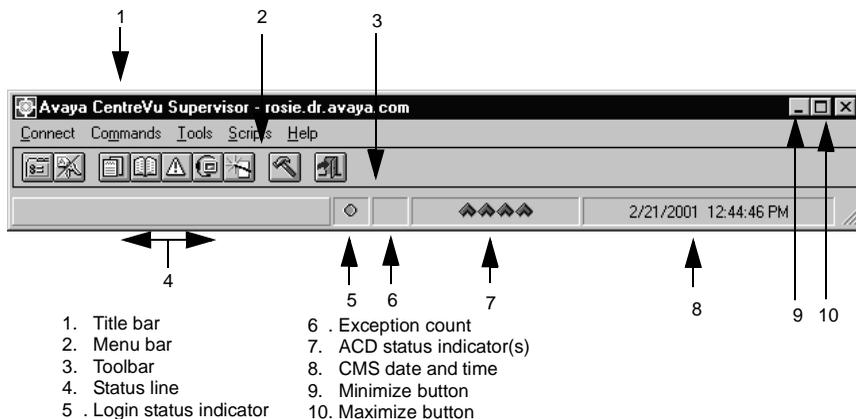
➤ NOTE:

The system menu box, title bar, and maximize and minimize buttons are not defined below because they work the same when you are logged in to the CMS server as they do when you are not logged in to the server. See "When you are not logged in to the CentreVu CMS server" on page 5-19 for information on these components.

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

Toolbar

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

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

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

Button	Name	Command
	Report Wizard	Initiates the Report Wizard command.
	CMS <u>S</u>ystem Setup	Initiates the CMS System Setup tool.
	<u>M</u>aintenance	Initiates the Maintenance tool.
	<u>U</u>ser Permissions	Initiates the User Permissions tool.
	E<u>x</u>it	Logs you out of CMS and closes the Supervisor application. The system displays a message box that notifies you that you are logged in and asks if you want to continue the exit.

Status bar

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

- **Login status indicator**. Shows a green light if you are connected to the CMS server. Shows a gray light if you are disconnected from the CMS server.

- **Exception count**. Gives you the current count of exceptions for all ACDs for which you have exception permissions. The exceptions count is cleared to zero at the beginning of the interval. For information on CMS exceptions, see *CentreVu® CMS R3V9 Administration*, 585-214-015.

- **ACD status indicators**. Shows which ACDs are active or inactive. There can be up to eight ACD icons showing, depending on how many ACDs this CMS supports. If you place your mouse over the ACD status indicator, the current ACD is displayed in the status bar. There are two variations of ACD status indicators, as follows:

  — If the link to any one of the ACDs is not functioning, the icon is crossed out.

  — If there is a TCP/IP connection between the switch and CMS, the ACD icon contains a bar. This means that CMS and the switch are not fully communicating at this time. This is a transitory state.

- **Current date and time**. Shows the current date and time of the CMS server that you are logged in to.

Menu bar

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

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

$\Longrightarrow$ NOTE:

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

The following sections describe the options that are available on each menu.

Connect

From the **Connect** menu, you can initiate or discontinue a connection to the CMS server. The **Connect** menu has the options that are shown in the following figure and described in the following table:

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

CentreVu Supervisor V9 Installation and Getting Started
Getting started with CentreVu Supervisor
Exploring the CentreVu Supervisor Controller   **5-29**

Commands

The **Commands** menu gives you access to the **Reports**, **Dictionary**, **Exceptions**, **Agent Administration**, and **Call Center Administration** subsystems in CMS. It also gives you access to the **Report Wizard**. These options are shown in the following figure and described in the following table:

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

Menu Item	Action
Dictionary	When you select **Dictionary** from the **Commands** menu or select the Dictionary button on the toolbar, the system displays the **Dictionary** selector window. The following tabs are available: • Operations • Reports From the **Dictionary** command, you can: • Assign names to splits/skills, trunk groups, call work codes, reason codes, ACDs, VDNs and vectors • Enter and edit agent names and agent groups • View and define CMS database items and calculations • Modify split/skill and trunk string values
Exceptions	When you select **Exceptions** from the **Commands** menu or select the Exceptions button on the toolbar, the system displays the **Exceptions** selector window. The following tabs are available: • Operations • Reports From the **Exceptions** command, you can administer timing-based or counting-based thresholds for exceptions and report on those exceptions.

CentreVu Supervisor V9 Installation and Getting Started
Getting started with CentreVu Supervisor
Exploring the CentreVu Supervisor Controller   **5-31**

Menu Item	Action
Agent **Administration**	When you select **A**gent **Administration** from the **Commands** menu or select the Agent Administration button on the toolbar, the system displays the **Agent Administration** selector window. The following tabs are available: • Operations • Reports From the **Agent Administration** command, you can view, add, delete, or modify Agent-related parameters on the switch, such as Change Agent Skills.
Call Center Administration	When you select **C**all **Center Administration** from the **Commands** menu or select the Call Center button on the toolbar, the system displays the **Call Center** selector window. The following tabs are available: • Operations • Reports From the **Call Center** command, you can: • View, add, delete, or modify call work codes • Change VDN skill preferences • Set up split/skill and VDN call profiles • Make trunk and VDN group assignments

Menu Item	Action
Report Wizard	When you select **Report Wizard** from the **Commands** menu or select the Report Wizard button on the toolbar, the system displays the **Report Wizard** window.
	The wizard guides you through a series of tasks that create a new customized report. Report Wizard is a supplement to Report Designer.
	For more information about the Report Designer, see *CentreVu® Report Designer Version 9 User Guide,* 585-210-930, or select Help in any Report Designer or Report Wizard window.

Tools

The **Tools** menu, gives you access to the **Options** window and the **Add Button** and **Remove Button** wizards. It also gives you access to the CMS **System Setup**, **Maintenance**, and **User Permissions** subsystems. These options are shown in the following figure and described in the following table:

Menu item	Action
Options...	When you select **Options** from the **Tools** menu or select the Options button on the toolbar, the system displays the **Options** window. You can set standard Supervisor preferences in the **Options** window. The following tabs are available: • General • Report Colors • Threshold Colors • Name Format • Scripting ➡️ **NOTE:** Selecting the Scripting tab in the Options window lets you log script execution as minimum, normal, or maximum. This window also lets you select a default script owner for automatic scripts. You can also specify a name for the log file and view the contents of the log file.
Advanced...	This menu item is used for debugging. Do not change the settings on the Advanced window unless you are instructed to do so by an Avaya associate.
Add Button	Selecting the **Add Button** tool starts the Add Button wizard, which guides you through the process of creating a button and adding it to the toolbar.
Remove Button...	Selecting the **Remove Button** tool displays a window that tells you how to remove a button from the toolbar.

CentreVu Supervisor V9 Installation and Getting Started
Getting started with CentreVu Supervisor
Exploring the CentreVu Supervisor Controller   **5-34**

Menu item	Action
System Setup	When you select **System Setup** from the **Tools** menu or select the CMS System Setup button on the toolbar, the system displays the **CMS System Setup** window. The Operations tab is available on the **CMS System Setup** window. From **CMS System Setup** you can view and modify information about how the CMS and switch were configured during installation.
Maintenance	When you select **Maintenance** from the **Tools** menu or select the Maintenance button on the toolbar, the system displays the **Maintenance** window. The following tabs are available: • Operations • Reports Use the **Maintenance** window to perform routine maintenance of the CMS, including backing up data, checking on the status of the connection to the switch, and scanning the error log.
User Permissions	When you select **User Permissions** from the **Tools** menu or select the User Permissions button on the toolbar, the system displays the **User Permissions** window. The Operations is available on the **User Permissions** window. The CMS administrator uses the **User Permissions** window to define CMS user IDs and access capabilities for each user.

Scripts

The **Scripts** menu gives you access to the Organize Scripts window which displays all logged-in user's scripts and script folders. The **Scripts** menu is shown in the following figure:

You can perform the following functions in the Organize Scripts window:

- List script names, or show details regarding list size, type, and date modified

- Add a new folder

- Move a script

- Delete a script

- Rename the script

$\Longrightarrow$ **NOTE:**

Scripts are a replacement for Bookmarks. For more information, see *CentreVu® CMS R3V9 Administration*, 585-214-015.

The following figure shows an example of the Organize Scripts:
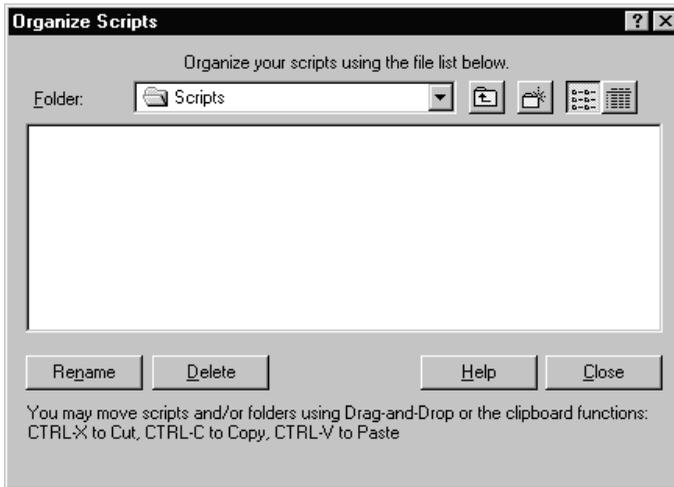
Help

The **Help** menu is the same when you are logged in to the CMS as it is when you are not connected. See "Help" on page 5-22 for details on using the online Help in Supervisor.

CentreVu Supervisor V9 Installation and Getting Started
Getting started with CentreVu Supervisor
Using the system tray icon   **5-37**

Using the system tray icon

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

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

- **Threshold highlights**. When a real-time report threshold highlight caution or warning condition is met, the system tray icon changes to the Caution or Warning icon, as appropriate.

- **Open windows**. Select the system tray icon to display a list of all of the Supervisor windows that are open. You can then select a window from the list to make it the current window.

$\Longrightarrow$ NOTE:

If a report threshold highlight caution or warning condition has been met, the Caution or Warning icon (as appropriate) displays next to the listed reports that are affected by that condition.

Depending on the state that is shown by the system tray icon, one of the following things happens when you double-click on the icon:

- If the Supervisor icon is shown, the Supervisor Controller window becomes the current window.

- If the Caution icon is shown, all reports that are currently running with a caution condition are brought to the front.

- If the Warning icon is shown, all reports that are currently running with a warning condition are brought to the front.

You can control the sort order of the system tray icon menu and turn the feature on and off by selecting the option on the General tab that is accessed by choosing **Options** from the **Tools** menu. For more information, see *CentreVu® CMS R3V9 Administration*, 585-214-015.

Using Supervisor menus

Supervisor menu items can be selected by performing any of the following actions:

- Clicking on the item.

- Using the arrow keys to highlight the item and then pressing Return.

- Using the assigned Microsoft Windows keyboard access characters or accelerator keys (hold down the **Alt** or **Ctrl** key and press the letter that is underlined in the word that you want to select).

CentreVu Supervisor V9 Installation and Getting Started
Getting started with CentreVu Supervisor
Using Supervisor selector windows 5-39

Using Supervisor selector windows

A selector window is the window that the system displays after you select an item from the **Commands** or **Tools** menu. The following figure shows an example of a selector window:
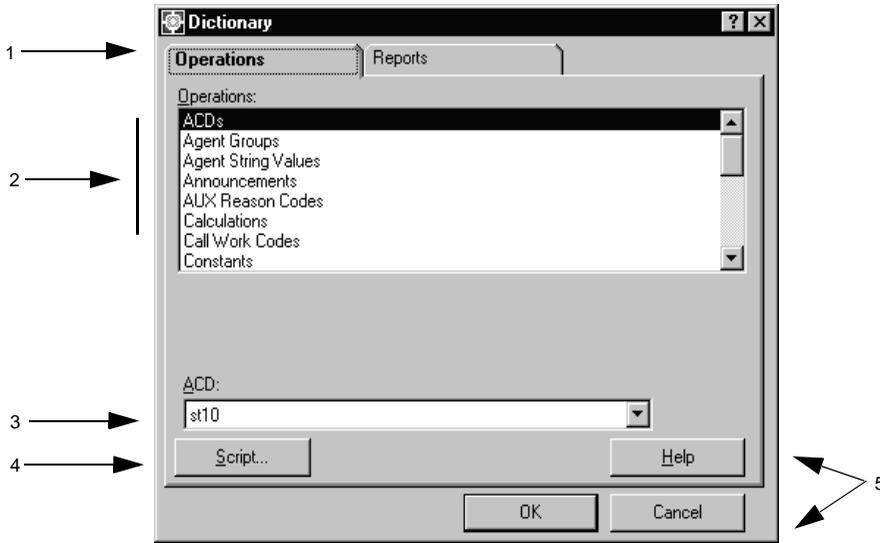
1. Tab folders
2. Available windows
3. Current ACD
4. Script... button
5. OK, Cancel, Help (and Apply) buttons

Tab folders

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

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

CentreVu Supervisor V9 Installation and Getting Started
Getting started with CentreVu Supervisor
Using Supervisor selector windows **5-40**

Available windows

Use the up-arrow and down-arrow keys or the mouse to highlight an item from the list of available windows and then select **OK** to open that window. The list of available windows is usually a list of Operations windows or a list of Reports windows.

Current ACD

The **ACD:** box shows the ACD that is currently selected.

Script... button

Scripts are tags that you can use to easily access operations and reports that you use often.

To create a script for a report or operation:

1. Highlight the item in the selector box.

2. Select the **Script...** button.

   The system displays the Save as Script window.

For more information on using the Scripting feature, see *CentreVu® CMS R3V9 Administration*, 585-214-015.

OK, Apply, Cancel, and Help buttons

The **OK**, **Apply**, **Cancel**, and **Help** buttons that are on Supervisor windows perform standard Microsoft Windows actions:

- **OK.** Accepts the current input and continues to the next window.

- **Apply**. Accepts the current input but does not continue to the next window (or return to the previous window).

- **Cancel**. Cancels the current input and returns you to the previous window.

- **Help**. Opens the help topic that is specific to this window.

CentreVu Supervisor V9 Installation and Getting Started
Getting started with CentreVu Supervisor
Completing input windows 5-41

Completing input windows

Once you select an operation or report, the system displays an input window.
The information that is required on the input window depends on what you are
doing in the system. The following figure shows an example of an input
window.
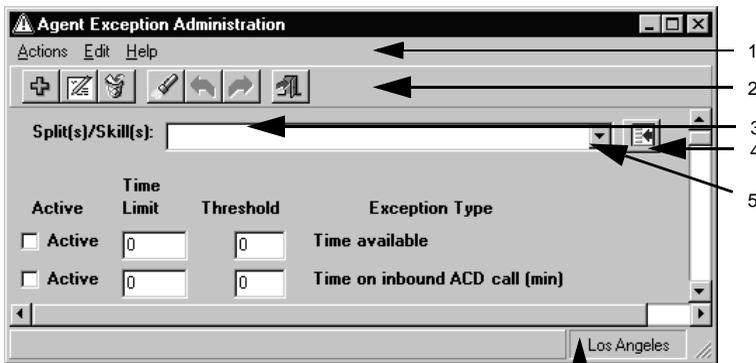
1. Menu bar
2. Toolbar action(s)
3. Input field(s)
4. Browse button
5. History list
6. Current ACD

Input windows have all or some of the following items:

- **Menu bar**. Includes menus for CMS **Actions** (Add, Delete, Find One,
  Next, Previous, List All, and Exit), **Edit** options (Cut, Copy, Paste, and
  Clear All), and Supervisor **Help**.

- **Toolbar action buttons**. Make it possible to perform CMS actions (Add,
  Delete, Find One, Next, Previous, List All, and Exit) by clicking a button.
  See Chapter 6, "Performing CentreVu CMS Operations," for more
  information on the action buttons.

- **Input fields**. Provide text boxes where you type in or select the
  information that is needed to complete the CMS action.

- **History list**. Displays a list of inputs you have previously used in the
  input field.

CentreVu Supervisor V9 Installation and Getting Started
Getting started with CentreVu Supervisor
Completing input windows **5-42**

- **Browse button**. Provides a list of all possible items for the input field from which you can then select one or more items as input. See "Using the browse button" on page 5-44 for more information. Also see "Selecting report run dates" on page 7-7 and "Selecting report run times" on page 7-10.

- **Current ACD**. Displays the ACD on which you are working.

CentreVu Supervisor V9 Installation and Getting Started
Getting started with CentreVu Supervisor
Completing input fields 5-43

Completing input fields

The following figure shows an example of an input window. The items that are related to completing input windows are labeled.

1. Input field(s)
2. History list
3. Browse button
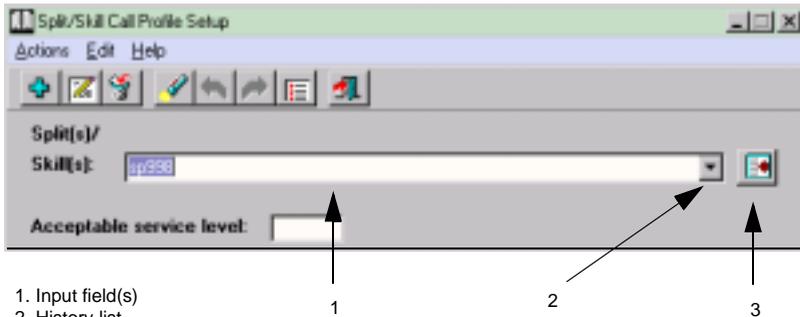
To complete an input field, do one of the following:

- Type in the information that is requested.

- Select the information from the history list of previously used items.

⇒ NOTE:

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

- Use the Browse button to view all of the available items for the input field, and then select one or more items as input. Also see "Selecting report run dates" on page 7-7 and "Selecting report run times" on page 7-10.

CentreVu Supervisor V9 Installation and Getting Started
Getting started with CentreVu Supervisor
Using the browse button 5-44

Using the browse button

When you select the Browse button, the system displays a window that lets you can use to select items for the input field. The browse selection window is different depending on whether the input is for a single entity or for multiple entries of the entity.

Single entity input

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

To use the Browse window:

1. In the list, highlight the name or number of the entity with which you want to work.

2. Select **OK**.

   The system displays the input window. The input field is populated with the name or number of the entity that you selected in the Browse window.

CentreVu Supervisor V9 Installation and Getting Started
Getting started with CentreVu Supervisor
Using the browse button 5-45

Multiple entries input

If the input allows for multiple entries of the entity (split/skill, vector, agent, VDN, trunk, or trunk group), the system displays a Browse window that is similar to the following example:
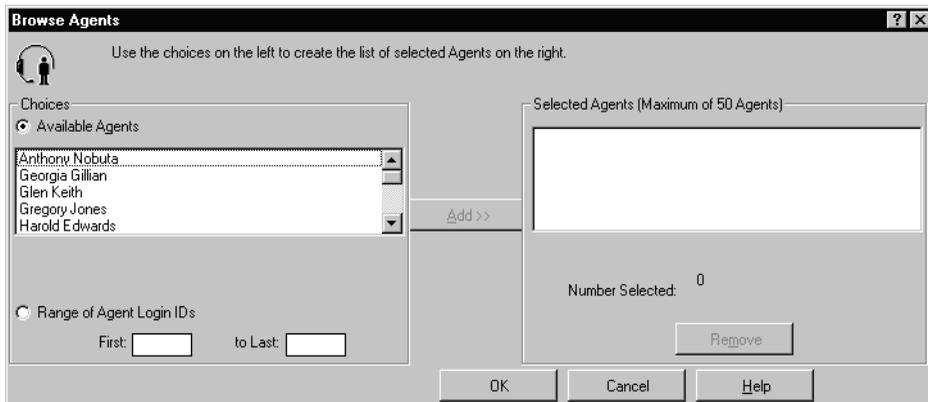
To use the Browse window:

1. In the Choices box, perform one of the following actions:

    - Highlight the names or numbers of the entities with which you want to work

    - Select a range of entity numbers

        To select a range:

        a. Select the Range of... option.

        b. In the First: text box, type the beginning entity number for the range.

        c. Press the Tab key to move to the to Last: text box.

        d. In the to Last: text box, type the ending entity number for the range.

CentreVu Supervisor V9 Installation and Getting Started
Getting started with CentreVu Supervisor
Using the browse button 5-46

$\Longrightarrow$ **NOTE:**

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

- Use a combination of highlighting names or numbers in the list and selecting a range of entity numbers.

2. Select **Add>>**.

   The entities that were highlighted in the **Choices** box are now listed in the **Selected ...** box.

3. Select **OK**.

   The system displays the input window and the input field is populated with the names or numbers of the entities that you selected.

CentreVu Supervisor V9 Installation and Getting Started
Getting started with CentreVu Supervisor
Using the history list 5-47

Using the history list

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

1. Input field(s)
2. Drop-down button
3. Browse button
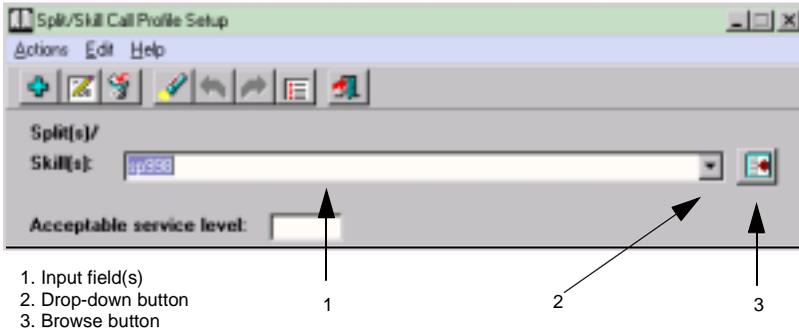
To use the history list to select the entity that you want to include for the report or operation that you are running:

1. Place the cursor in the text box.

2. Select the drop-down button.

3. Click the item that you want to add to the input field.

   The system closes the history list and the item is added to the text box.

Closing Supervisor windows

To close Supervisor windows, use any of the standard Microsoft Windows-based methods. You can also select **Exit** from the **Connect** menu to close all windows and quit the Supervisor application.

If the CMS server shuts down or is being changed to single-user mode, Supervisor displays a warning message and then any open windows are closed.

CentreVu Supervisor

Performing CentreVu CMS operations

Overview

This chapter provides information about the menus and inputs that you use to perform CentreVu Call Management System (CMS) operations in CentreVu Supervisor (Supervisor). This chapter includes the following sections:

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

- **Co<u>mm</u>ands > <u>D</u>ictionary**

- **Co<u>mm</u>ands > <u>E</u>xceptions**

- **Co<u>mm</u>ands** > **<u>A</u>gent Administration**

- **Co<u>mm</u>ands** > **<u>C</u>all Center Administration**

- **<u>T</u>ools > <u>S</u>ystem Setup**

- **<u>T</u>ools > <u>M</u>aintenance**

- **<u>T</u>ools > <u>U</u>ser Permissions**

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

⇒ **NOTE:**

Additional information that is specific to each Operations tab (that is, **<u>D</u>ictionary**, **<u>E</u>xceptions**, **<u>A</u>gent Administration**, **<u>C</u>all Center Administration**, **<u>S</u>ystem Setup, <u>M</u>aintenance**, or **<u>U</u>ser Permissions**), can be found in *CentreVu® CMS R3V9 Administration,* 585-214-015.

Running an operation

To run an operation:

1. From the **Commands** or **Tools** menu, select one of the following options:

   - **Dictionary**
   - **Exceptions**
   - **Agent Administration**
   - **Call Center Administration**
   - **System Setup**
   - **Maintenance**
   - **User Permissions**

   The system displays the Operations list box for the application that you selected. In the following example, **Dictionary** was selected.
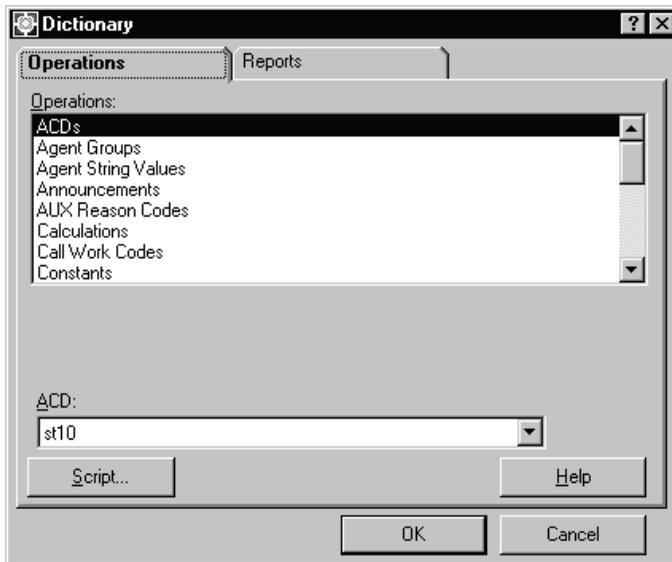
2. Select an operation from the Operations list box.

3. From the ACD drop-down list, select the ACD for which you want to perform the operation, as shown in the following figure:
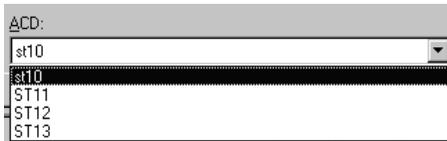
4. Select **OK**.

5. The system displays the operation input window. The inputs that are required vary, depending on which operation you are running.

6. Complete the operation input window.

   The following example from the **Commands** > **Call Center Administration > Operations** tab shows the possible types of information that might be required to complete an operation input window.
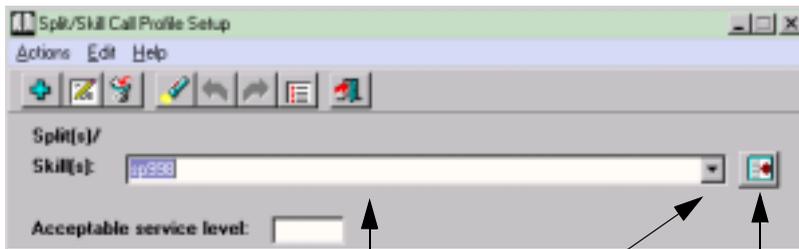
1. Input field(s)
2. History list
3. Browse button

7. Fill in the input fields. Input fields are where you specify the information that you want to view, add, modify, or delete. Use any of the following methods:

   - Type in the name or number of the input that is requested.

   - Use the history list to select an input that you have previously used.

   - Select the **Browse** button to view all of the available inputs and then select one.

8. Perform one of the following actions, depending on the ACD for which you want to perform the operation:

- If you want to perform the operation for the ACD that is currently selected, that is, the one that is displayed at the bottom of the input window, continue with Step 9.

- If you want to perform the operation for an ACD other than the one that is currently selected, that is, the one that is displayed at the bottom of the input window, perform the following Steps a through d.

  a. Go to the selector window you chose in Step 1.

  b. Change the ACD on the selector window.

  c. Select the operation you want to perform.

  d. Select **OK**.

  The system displays the input window again and the input fields are populated with any inputs that you previously entered.

9. Select **OK**.

   The system runs the operation.

Operations menus

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

Actions menu

The **Actions** menu is found in the **Dictionary**, **Exceptions**, **Agent Administration**, **Call Center Administration**, **Maintenance**, **System Setup**, and **User Permission** operations windows. Actions are used to perform CMS-related functions. The following figure shows what the menu bar looks like when the **Actions** menu item is available:
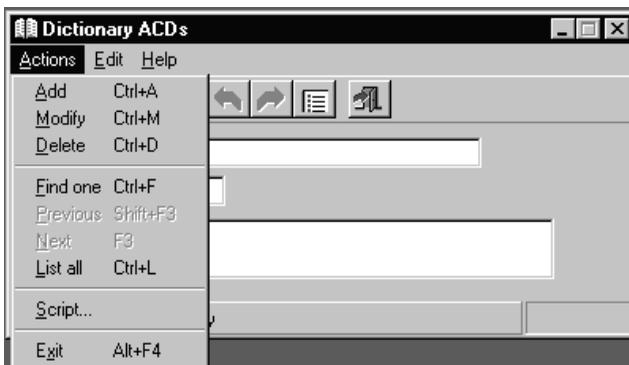
This menu contains all of the CMS actions that are available in the current window. The menu items and their associated buttons on the toolbar are in the same order. For example, **Add**, **Delete** and **Modify** are grouped together, as are **Find One**, **Previous**, **Next**, and **List All**. **Exit** is always last on the menu and the last button on the toolbar.

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

Action	Button	Description
Add		Adds the data that you entered in the current window to the database.
Cancel		Cancels the operation that is in progress.
Copy Group/ Create		Creates a new group from an existing one.
Delete		Removes the entry on your current window from the CMS database.
Exit		Exits the window and other associated windows.
Find one		Searches the database for entries that match the input values in the current window.
Get contents		Provides access to the members of the agent group.
List all		Lists all of the entries that matched the current field values.
List Devices		Lists all the devices that are specified in the Backup/Restore Devices window.
Modify		Changes the database entry to reflect the new values that are entered in the current window.
Next		If you have used the Find One function, the **Next** button displays the next match that is found. Otherwise, this button is not available.
Previous		If you have used the Find One function, the **Previous** button displays the previous match that is found. Otherwise, this button is not available.

Action	Button	Description
Run/Start		Starts the process for your current window.
Script...	(No icon)	Displays the Save as Script - Action window. Use this window to enter information in the appropriate fields, and then select the Add, Modify, or Delete action, and save it as a script. If Add, Modify, or Delete are not present, the Save as Script menu item is not present.
Select tables		Allows you to select specific tables to back up or restore.

Edit menu

The **Edit** menu is found on all **Dictionary**, **Exceptions**, **Maintenance**, **System Setup**, and **User Permissions** operations windows. Edit options are used to perform functions that are related to Microsoft Windows[*]. The following figure shows what the menu bar looks like when the **Edit** menu item is available:
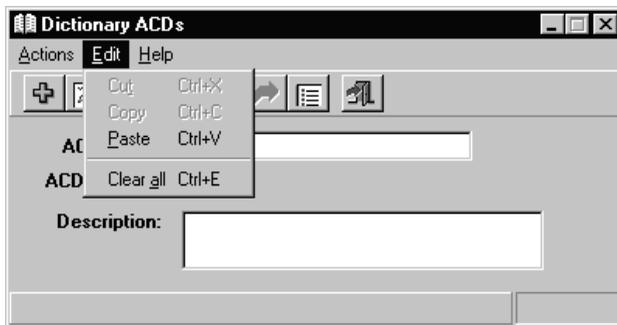
The following table lists the options on the **Edit** menu:

Menu item	Shortcut	Action
Cut	Ctrl + X	A standard feature of Microsoft Windows that removes selected text or graphics and places the items on the clipboard. This item is available on windows that have input fields and on List All windows.

---

*Microsoft Windows is a trademark of Microsoft Corp.

Menu item	Shortcut	Action
Copy	Ctrl + C	A standard feature of Microsoft Windows that copies the image of the currently selected chart, text, or cell to the clipboard in Microsoft Windows metafile format (*.wmf). This makes it possible for you to paste the item into any Microsoft Windows application that supports the Copy and Paste commands, such as a word processor. This item is available when text is selected in the window or the cell is selected in a List All window. You can also access the Copy command from menu that is displayed when you click the button on the right-side of the mouse.
Paste	Ctrl + V	A standard feature of Microsoft Windows that inserts a copy of the contents of the clipboard at the insertion point or replaces the selection (if any) with the text on the clipboard. This item is available only on windows that have input fields and when the clipboard is not empty.
Clear **a**ll	Ctrl + E	A feature that is available only on windows that have input fields. This item clears all of the values that are entered in the input fields and resets option buttons to their default value.

Adding items to the CMS database

After you select an operation, the system displays an input window. You can use this input window to add an item to the CMS, such as an agent group, a CMS user ID, or agent login IDs.

To add items from an operations input window:

1. Fill in the information that is required in the input fields.

2. Use one of the following methods to activate the **Add** action:

   - From the **Actions** menu, select **Add**

   - Select the Add button [+] on the toolbar

   - Press **Ctrl+A**

   If the item was added successfully, the system displays the word "Successful" in the status bar at the bottom of the window.

   If you do not have the required write permissions to add the item, the system displays the word "Failed" in the status bar at the bottom of the window and then displays an error message.

Finding items in the CMS database

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

List all

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

To list all of the items that are related to an operations window:

1. Perform one of the following actions, depending how specific you want the list of items to be:

   - Leave the text boxes on the input window blank to list all of this type of entity that exist on the CMS

   - Complete specific text boxes to refine the list to a specific range of output.

2. Use one of the following methods to activate the **List all** action:

   - From the **Actions** menu, select **List all**

   - Select the List all button 🔲 on the toolbar

   - Press **Ctrl+L**

   The system displays a list of all of the items that match the criteria on the input window.

Find one

Use **Find one** when you know some or all of the information that is specific to an entity, or when you want to list all of the entities of a specific type, one by one.

To find one entity at a time:

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

   This is your find criteria.

2. Use one of the following methods to activate the **Find one** action:

   - From the **Actions** menu, select **Find one**

   - Select the Find one button ![icon] on the toolbar

   - Press **Ctrl+F**

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

   If there is more than one match, the status bar reads "xx matches found", where xx is the number of matches found.

3. Use one of the following methods to scroll through the **Find one** matches:

   - From the **Actions** menu, select **Next** and **Previous**

   - Select the Next button ![icon] or the Previous button ![icon] on the toolbar

   - Pressing the **F3** key (Next) or the **Shift+F3** key (Previous)

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

$\Longrightarrow$ NOTE:

For more information on the List all and Find one commands, see *CentreVu® CMS R3V9 Administration*, 585-214-015.

Modifying items in the CMS database

After you select a category from the Operations tab, the system displays an input window. If you want to modify the information for an item that already exists in the CMS database, such as an agent group, a CMS user ID, or agent login IDs, complete the following steps:

⚠ CAUTION:
If you leave any fields blank and select the Modify command, any data that is currently stored in those blank fields is erased from the CMS database.

1. Perform one of the following actions, depending on the amount of information you know about the item that you want to modify:

   * If you know all or part of the specific information that is required for the input text boxes:

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

        This is your find criteria.

     b. Use one of the following methods to activate the **Find one** action:

        — From the **Actions** menu, select **Find one**

        — Select the Find one button 🖉 on the toolbar

        — Press **Ctrl+F**

   * If you do not know the specific information that is required for the input text boxes:

     a. Use one of the following methods to activate the **List all** action:

        — From the **Actions** menu, select **List all**

        — Select the List all button 📧 on the toolbar

        — Press **Ctrl+L**

     b. Locate the information for the entity that you want to modify and note the relevant information.

    c. Close the List all window.

      The system displays the input window.

    d. Complete the text boxes for which you have information.

    e. Use one of the following methods to activate the **Find one** action:

      — From the **Actions** menu, select **Find one**

      — Select the Find one button 🔍 on the toolbar

      — Press **Ctrl+F**

2. Update the information in the text boxes.

3. Use one of the following methods to activate the **Modify** action:

   • From the **Actions** menu, select **Modify**

   • Select the Modify button 📝 on the toolbar

   • Press **Ctrl+M**

If the item was modified successfully, the system displays the word "Successful" in the status bar at the bottom of the window.

If you do not have the required write permissions to modify the item, the system displays the word "Failed" in the status bar at the bottom of the window and then displays an error message.

⇛ NOTE:

If you try to modify a database entry that does not yet exist in the CMS, the status bar reads, "Does not exist," and you need to follow the instructions in "Adding items to the CMS database" on page 6-11 to add the item to the database.

Deleting items from the CMS database

After you select an operation from the Operations tab, the system displays an input window. If you want to delete the information for an item that already exists in the CMS, such as an agent group, a CMS user ID, or agent login IDs, complete the following steps:

⚠ CAUTION:
The system does not display a warning message when you select Delete. The item that you specify is automatically be deleted from the CMS database.

1. Perform one of the following actions, depending on the amount of information you know about the item that you want to modify:

   - If you know all or part of the specific information that is required for the input text boxes:

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

        This is your find criteria.

     b. Use one of the following methods to activate the **Find one** action:

        — From the **Actions** menu, select **Find one**

        — Select the Find one button 🔍 on the toolbar

        — Press **Ctrl+F**

   - If you do not know the specific information that is required for the input text boxes:

     a. Use one of the following methods to activate the **List all** action:

        — From the **Actions** menu, select **List all**

        — Select the List all button 🔳 on the toolbar

        — Press **Ctrl+L**

     b. Locate the information for the entity that you want to modify and note the relevant information.

   c. Close the List all window.

   The system displays the input window.

   d. Complete the text boxes for which you have information.

   e. Use one of the following methods to activate the **Find one** action:

   — From the **Actions** menu, select **Find one**

   — Select the Find one button 🔍 on the toolbar

   — Press **Ctrl+F**

2. Use one of the following methods to activate the **Delete** action:

   — From the **Actions** menu, select **Delete**

   — Select the Delete button 🗑 on the toolbar

   — Press **Ctrl+D**

If the item was deleted successfully, the system displays the word "Successful" in the status bar at the bottom of the window.

If you do not have the required write permissions to delete the item, the system displays the word "Failed" in the status bar at the bottom of the window and then displays an error message.

If the item does not exist in the CMS database the system displays "Does not exist" in the status bar.

CentreVu
Supervisor

Using CentreVu Supervisor reports

Overview

The reports that are produced by the CentreVu Call Management System (CMS) display in CentreVu Supervisor (Supervisor). These reports display, report, and summarize the performance of any measured subset of the ACD, including agents, splits/skills, trunks, trunk groups, VDNs, and vectors.

This chapter provides information on how to display CMS reports in Supervisor. This chapter includes the following sections:

- "Exporting report data" on page 7-47

- "Copying chart reports" on page 7-50

- "Resizing report windows" on page 7-51

- "Changing column widths" on page 7-52

- "Selecting a printer" on page 7-53

- "Using Page Setup" on page 7-54

- "Setting report threshold highlights" on page 7-56

- "Report Options" on page 7-74

- "Exiting and restarting reports" on page 7-89

Report menus and tabs

The way you select, run, edit, and view a report is the same, no matter where you run it from. Reports are available from the following menus and tabs:

- **Commands** > **Reports** > **Real-Time**, **Historical**, or **Integrated** tab

- **Commands** > **Dictionary** > **Reports** tab

- **Commands** > **Exceptions** > **Reports** tab

- **Commands** > **Agent Administration** > **Reports** tab

- **Commands** >**Call Center Administration** > **Reports** tab

- **Commands** >**Report Wizard**

- **Tools** > **Maintenance** > **Reports** tab

NOTE:
Additional information that is specific to each Commands or Tools menu option can be found in *CentreVu® CMS R3V9 Administration*, 585-214-015.

Running a report

To run a CMS report in Supervisor:

1. In the Supervisor Controller toolbar, select **Commands** to display the **Commands** menu.
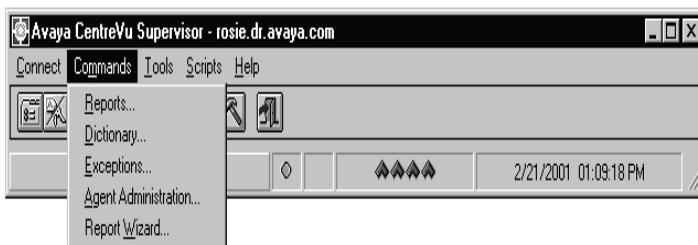
2. Select one of the following options:

- **Commands** > **Reports** > **Real-Time**, **Historical**, or **Integrated** tab
- **Commands** > **Dictionary** > **Reports** tab
- **Commands** > **Exceptions** > **Reports** tab
- **Commands** > **Agent Administration** > **Reports** tab
- **Commands** > **Call Center Administration** > **Reports** tab
- **Tools > Maintenance** > **Reports** tab

$\Longrightarrow$ **NOTE:**

If you have Report Designer and want to quickly and easily generate a new customized report, select the **Report Wizard** button in the Controller toolbar. For more information about the Report Designer, see the *CentreVu® Report Designer Version 9 User Guide,* 585-210-930.

The system displays the Report Selector window. The following figure shows an example of the Report Selector window. The tabs in this window will vary, depending on which option you chose from the **Commands** or **Tools** menu.
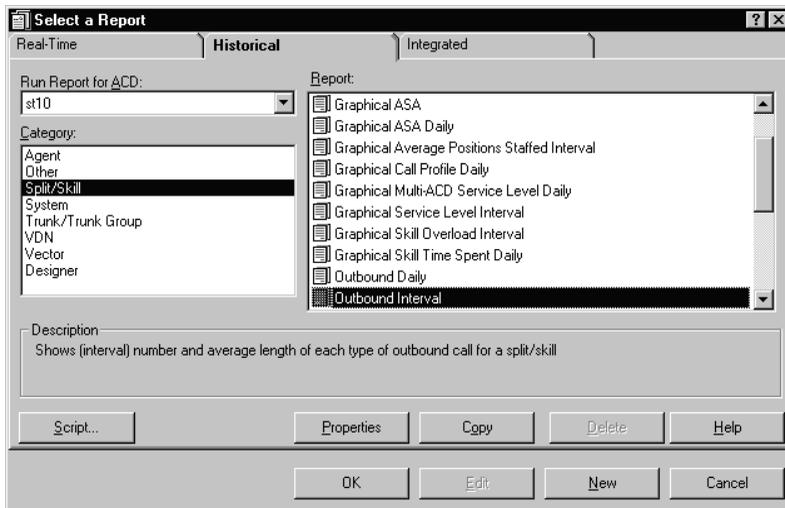
3. Select a category from the **Category** list.

4. Select a report from the **Report** list.

5. Use the drop-down menu to select the ACD for which you want to run the report from the **Run Report for ACD** text box.

6. Perform one of the following actions, depending on whether or not you want to schedule a script:

   - If you do not want to schedule a script, continue with Step 7.

   - 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.

7. Select **OK**, or double-click the report.

   The system displays the report input window. The inputs that are required vary, depending on which report you are running.

8. Continue with "Completing the report input window" on page 7-5.

Completing the report input window

The following figure shows possible types of input that might be required to run a report. The inputs that are required vary, depending on which report you are running.
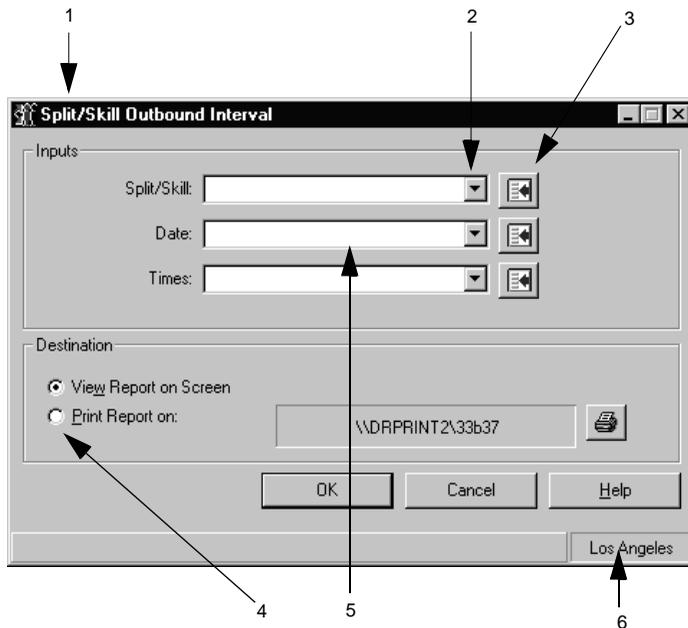
1. Report title
2. History list
3. Browse button
4. Destination selection
5. Input field(s)
6. Current ACD

To complete an input window:

1. Use the following methods to complete the input field(s).

   • 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 entered.

2. For all reports other than the **Commands > Reports Real-Time** tab and
   the **Commands > Reports Integrated** tab, select the report destination.

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

3. Perform one of the following actions to select the report destination:

   • Select the **View Report on Screen** destination.

   • Select the **Print Report on:** destination. If you want to print on a
     printer other than the one that is displayed, click the ⬜ button.

4. Ensure that the correct ACD is selected. The current ACD, which is
   selected on the Report Selector window, is displayed at the bottom right of
   the input window.

5. If you want to run a report for a different ACD than the one that is selected,
   perform Step a through Step d:

   a. If you are in an input window, select **Cancel** to exit the report input
      window.

   b. Go to the selector window that you chose in Step 1.

   c. Change the ACD on the selector window.

   d. Select the Report that you want to run.

6. Select **OK** to run the report.

Selecting report run dates

When you run historical reports, you must select the date or dates for which to run the report. Use one of the following methods to select a date:

- Type the date or date range in the **Date(s):** input field.

- Type a relative date, for example, **-2** for two days ago.

- Select the date or dates from the history list of previously used dates for this report.

- Select the **Browse** button .

  — If you select the **Browse** button and the input needed is a single date, the system displays the following window:
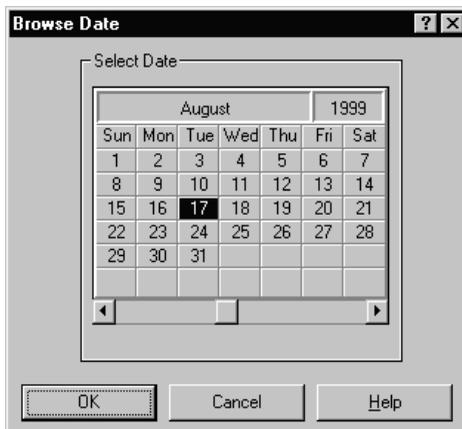
To select a specific date, click the day that you want. The day is highlighted.

To choose a date that is not in the current month, use the arrow keys at the bottom of the calendar box to scroll through the months.

— If you select the **Browse** button and the input needed is for more than one date, the system displays the following window:
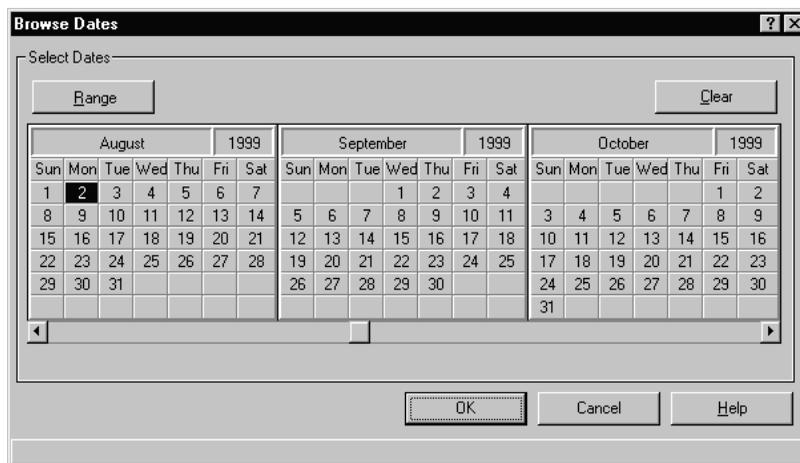
To select specific dates, click the day that you want. The day is highlighted. You can select as many days as you want.

To select a range of dates, select the **Range** button, click the first day of the range, and then click the last day of the range. The dates that you select are highlighted. You can select as many ranges as you want, but you must select the **Range** button to define each range.

To choose a date that is not in the current month, use the arrow keys at the bottom of the calendar box to scroll through the months.

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

— If the input needed is for 1 month, the system displays the following window:

This window is used in monthly reports where the data is for a single month. The form is initially displayed with the values in the input field or to the month previous to the current month when the input field is empty. Select a single month and year for the report. The earliest date that you can select is January 1980. The latest date that you can select is December 2055.

— If the input needed is for more than 1 month, the system displays the following window:
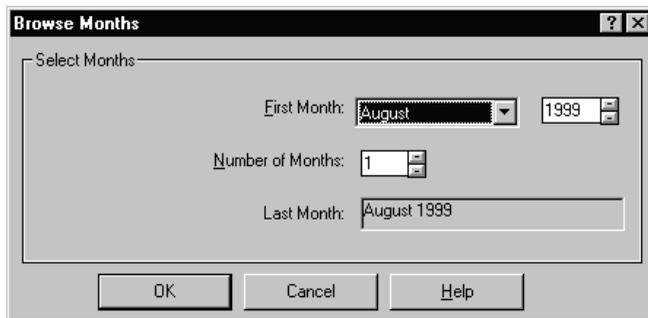
This window is available in monthly reports where the data is for 1 or more months. The report runs, beginning with the month entered in the **First Month:** field, and going through as many months as are specified in the **Number of Months:** field.

The months are in calendar order. The earliest date that you can select is January 1980. The latest date that you can select is December 2055.

Selecting report run times

When you run interval historical reports, you must select the time period for which to run the report. Use one of the following methods to select the time period in the report input window:

- Type the time range in the **Times:** input field.

- Select the times from the history list of previously used times for this report.

- Select the **Browse** button that is to the right of the **Times:** field.

  If you select the **Browse** button, the system displays the following window:
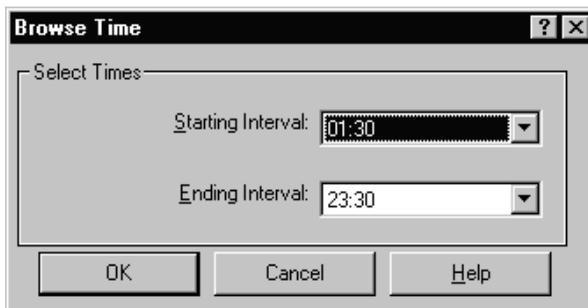
Provide the following input in the Select Times box:

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

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

Report menu bar

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

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

The following sections describe the options that are available in each of these menus.

Report

The Report menu includes standard Microsoft Windows[*] options that relate to the report you are running. The following figure shows the items that are available in the **Report** menu.

Menu item	Action
Restart	Closes the current report output window and displays the input window for the current report. This allows you to run the same report, changing inputs as needed.
	The **Restart** menu item is unavailable if you are currently running a drill-down report or if the report is an unsaved report that was created using the Report Wizard.
Page Setu**p...**	Displays the Page Setup window. See "Using Page Setup" on page 7-54 for more information.
Print...	Displays the Print window. See "Selecting a printer" on page 7-53 for more information.
	$\Rightarrow$ **NOTE:**
	When you select **Print**, the report that is active is printed according to the options that you choose in the Print window. If the report is a real-time report, only one instance of the report prints. The real-time report does not print each time it is refreshed.

Menu item	Action
Print Preview...	Displays the report so that you can see it before printing.
Design	Allows you to access the Report Designer Design Mode window from any report if you have purchased the Report Designer software and your CMS User ID is authorized to use the Report Designer. When you select **Design**, the report that is currently running remains visible, but you are placed in the Design Mode, where you can edit the report. The Design menu item is unavailable if you are currently running a drill-down report. $\Longrightarrow$ **NOTE:** For more information on the Design Mode, see *CentreVu® Report Designer Version 9 User Guide*, 585-210-930.
Save	Saves the report that you edited.
Save As	Saves the report that you edited under a different file name.
Save as HTML...	Displays the Save as HTML window, which you can use to save a snapshot of the report output as an HTML file. Selecting the **Script** button in this window displays the Save as Script window, in which you can create a script to run the specified report and save the output as an HTML file. $\Longrightarrow$ **NOTE:** For more information on the Save as HTML feature, see Appendix A, "Saving as HTML."

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

Edit

The following figure shows the standard Microsoft Windows editing options that are available in the **Edit** menu.

Menu item	Action
Copy	Copies the image of the currently selected chart to the clipboard in Microsoft Windows metafile (*.wmf) format. This makes it possible for you to paste the chart image into any Microsoft Windows application that can read the metafile format. For instance, you an copy chart reports and import the files into word processing files to be used as viewgraphs.
	You can also access **Copy** from the menu that is displayed when you click the right mouse button while the cursor is on a report.
	See "Copying chart reports" on page 7-50 for more information.
Export Chart Data...	Accesses the Data Export Options window which makes it possible for you to export the data in the currently selected chart. If the report is a real-time report, only one instance of the data is exported. If there is more than one chart on this report, this option is unavailable until you select a chart.
	You can also access the Data Export Options window from the menu that is displayed when you click the right mouse button while the cursor is on a chart.
	For more information, see "Exporting report data" on page 7-47.

Menu item	Action
Export <u>Table</u> Data...	Accesses the Data Export Options window which makes it possible for you to export the table data in the report. If the report is a real-time report, only one instance of the data is exported. If there is more than one table on the report, this option is unavailable until you select a table.
	You can also access the Data Export Options window from the menu that is displayed when you click the right mouse button while the cursor is on a chart.
	For more information, see "Exporting report data" on page 7-47.
Export <u>All</u> Data...	Accesses the Data Export Options window which makes it possible for you to export all of the data in the report. You can also include labels and headers in the data that are exported. If the report is a real-time report, only one instance of the data is exported.
	You can also access the Data Export Options window from the menu that is displayed when you click the right mouse button while the cursor is on a chart.
	For more information, see "Exporting report data" on page 7-47.

Format

The **Format** menu contains actions for modifying the display format of the currently selected object. If an action does not apply to the selected object, it is unavailable. The following figure shows the items that are available in the **Format** menu.
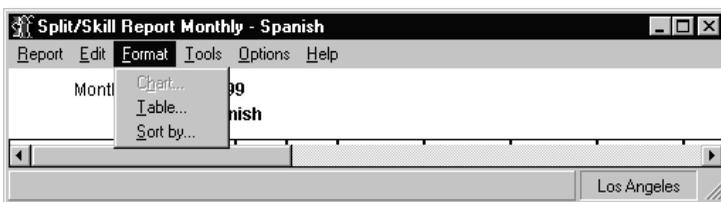
Menu Item	Action
Chart...	Allows you to format a chart.
	You can also access the Format Chart window from the menu that is displayed when you click the right mouse button while the cursor is on a report.
Table...	Allows you to format a table.
	You can also access the Format Table window from the menu that is displayed when you click the right mouse button while the cursor is on a report.
Sort by...	Allows you to sort the table by several parameters that are specific to the information in the selected table.
	You can also access the Sort by window from the menu that is displayed when you click the right mouse button while the cursor is on a report.

Tools

The **T**ools menu contains additional actions that affect the currently selected object. The following figure shows the items that are available in the **T**ools menu.

Menu item	Action
Available drill-down reports	Allows you access any drill-down reports that are available from the report that is currently running.
	You can also access the drill-down reports from the menu that is displayed when you click the right mouse button while the cursor is on a report.
	For information on drill-down reports, see the appropriate chapter in *CentreVu® Supervisor Version 9 Reports*, 585-210-929.
Threshold settings...	Opens a window that allows you to view or modify threshold highlight settings. Threshold highlight settings apply only to some real-time data items in real-time and integrated reports.
	You can also access the Threshold settings from the menu that is displayed when you click the right mouse button while the cursor is on a report.
	For information on setting threshold highlights, see "Setting report threshold highlights" on page 7-56.

Menu item	Action
Change <u>A</u>gent Splits/Skills	$\Longrightarrow$ **NOTE:** If the current ACD supports Expert Agent Selection (EAS), this menu item reads **Change Agent <u>S</u>kills**. If the current ACD does not support EAS, this menu item reads **Change Agent <u>S</u>plits**. Opens the Change Agent Skills window (EAS) or Change Agent Split (non-EAS) for the selected agent. You can then modify the split/skill assignments for the agent. This menu item is enabled only when the selected table cell in a report is an agent name or agent login ID. If you do not have write permission for Agent Administration, this menu item is not shown. For information on changing agent splits/skills, see the appropriate chapter in *CentreVu® CMS R3V9 Administration*, 585-214-015.

Options

The **Options** menu contains actions that affect the basic display of the report. The following figure shows the items that are available in the **Options** menu.

Menu Item	Action
Thresholds	Turns threshold highlighting on or off for this real-time report.
	When threshold highlighting is on, the report shows the threshold colors, or icons if the report is minimized, that are specified in the Threshold Settings window.
	When threshold highlighting is off, the report does not show the threshold colors.
Status Bar	Shows or hides the status bar.
	When the status bar is hidden, the window remains the same size but the contents are resized to fill the window. Hide the status bar to get a larger viewing area for the report.
	When the status bar is made visible, the window remains the same size but the contents are resized to fill the smaller window area.
	The status bar setting is saved in the report view.
Restore Original View	Restores the report view to the original settings. All changes that were made to the format of this report are discarded.

Report layouts

There are two types of report layouts in Supervisor:

- **Tables**. The Supervisor presentation of standard CMS reports

- **Charts**. The Supervisor presentation of graphical reports.

A report can consist of only one or more tables, only one or more charts, or a combination of tables and charts.

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

The following sections describe each type of report layout.

Tables

Most standard CMS reports are displayed in tables. The following figure shows how the information on a standard report window is organized:

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

Standard real-time reports can be sorted. See "Formatting table reports" on page 7-24 for more information.

Charts

Reports for which the name begins with "Graphical" are displayed in charts. The following figure shows how the information on a chart report window is organized:
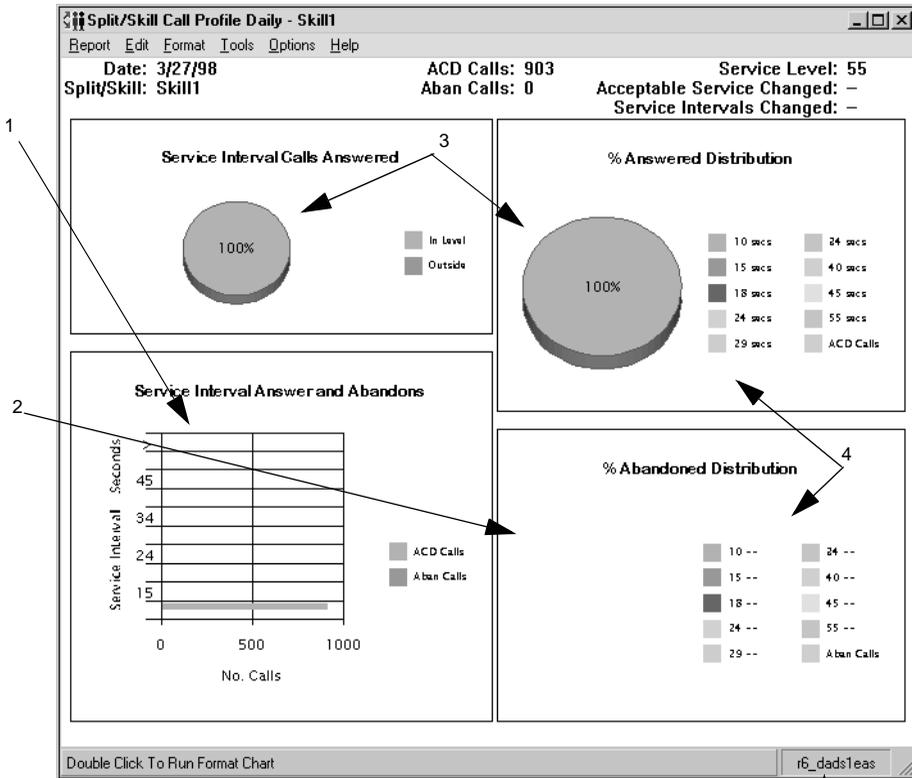
1. Bar chart
2. Line chart
3. Pie chart
4. Legend
5. Current ACD

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

Formatting table reports

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

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

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

- Double-click on a column heading in the report.

- From the **Format** menu, select **Format Table** or **Sort by.**

  You can also access the **Format** menu from the menu that is displayed when you click the right mouse button while the cursor is on a report.

⇒ NOTE:
The Table Format Options window makes it possible for you to make layout changes to a table. All changes that you make are saved as part of the report view when you exit the report.

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

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

The following sections describe the General and Sort tabs.

General tab

Use the **General** tab to make format changes to a table.

Spin box
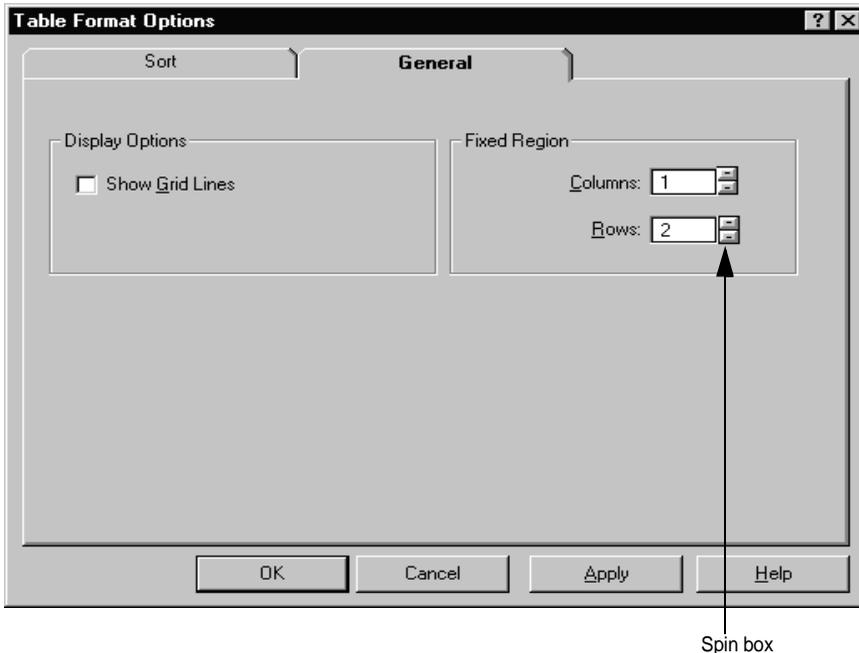
The following table parameters can be changed:

- **Show Gridlines**. Specifies whether or not table lines are shown in the table.

- **Fixed Region, Columns**. Specifies the number of columns from the left of the table that are fixed in place and do not scroll. Valid values are in the range of 0 through 99. Use the **Columns** box to select a valid value or type in the value.

- **Fixed Region, Rows**. Specifies the number of rows from the top of the table that are fixed in place and do not scroll. Valid values are in the range of 0 through 99. Use the **Rows** box to select a valid value or type in the value.

Sort tab

Use the **Sort** tab to specify the order in which the following information on the real-time table report displays.
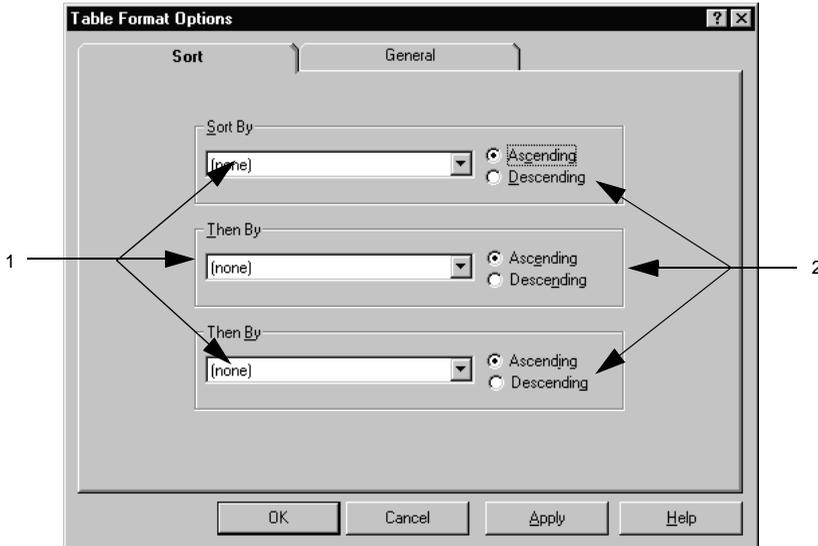
1. Sort By criteria drop-down lists
2. Sort order

To set up the display order for a real-time report, specify the sort column and the sort order in the **Sort By** area. The Sort By list shows all of the database table and item names that are used in the report. Select either **Ascending** or **Descending** as the sort order.

Sorting may cause report refreshes to take longer. To speed up the refresh rate, turn off the sort options by selecting **none** for all of the Sort By criteria.

Using sorting to view alphabetically

To view a list of agents alphabetically:

1. Select **Agent Name** from the first **Sort By** drop-down list.

2. Select **Ascending** as the sort order.

3. Leave the other two **Sort By** boxes set to **none**.

4. Select **OK**.

Using sorting to search

To search for agents who have been in a certain state for too long:

1. Select **State** from the first **Sort By** drop-down list.

2. Select **Time** from the second **Sort By** drop-down list.

3. Select **Descending** as the sort order for the second **Sort By**.

4. Leave the third **Sort By** box set to **none**.

5. Select **OK**.

Formatting chart reports

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

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

If you are in a graphical report, you can format how the report is displayed.

$\Rightarrow$ **NOTE:**

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

To format a chart report:

1. From the **Format** menu, select **Format Chart** or **Sort by**.

   You can also access the **Format** menu from the menu that is displayed when you click the right mouse button while the cursor is on a report.

   The system displays the Chart Format Options window:
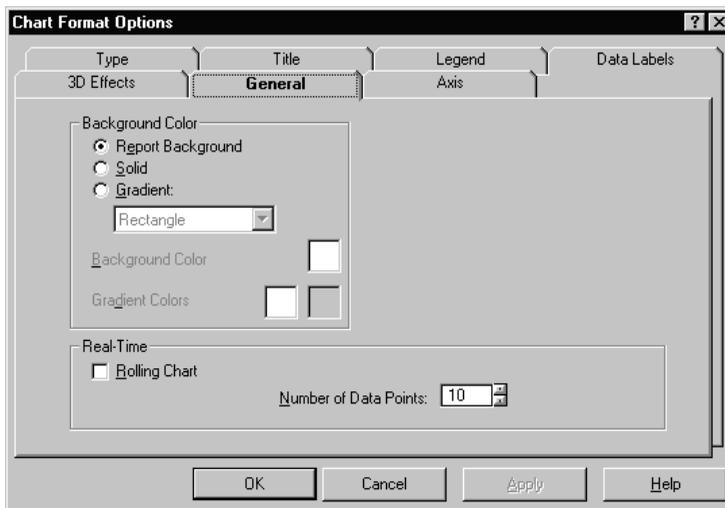
The following sections describe each of the tabs.

General tab

Use the **General** tab to specify several general parameters that apply to the chart.
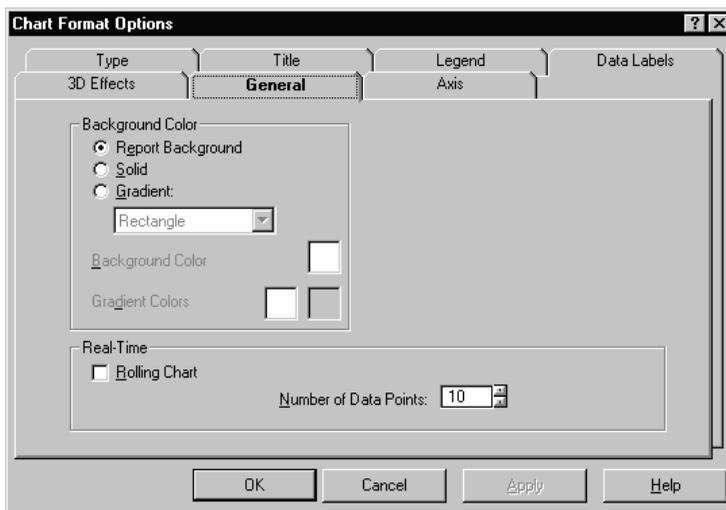
The following chart parameters can be changed:

- **Background Color**. Use this area to specify whether the backdrop of the chart is a solid color or whether it is displayed as a gradient, that is, a smooth transition from one color to another. The gradient transition can be: **Horizontal**, **Vertical**, **Rectangle**, or **Oval**. The quality of the gradient effect depends on the video card that is installed in the PC, or the capabilities of the printer for printed reports.

- **Real-Time**. If the chart is a rolling chart, use this area to specify the number of data points to be displayed in the chart. Permitted values are 2 through 100. The default is 10. A rolling chart is a line chart that is initially displayed with no data points. Each time that report is refreshed, a data point is added. As data points are added, the chart "rolls" from left to right.

When the chart is displaying the number of specified data points, the oldest data point is dropped from the display and the newest data point is displayed the next time that the report is refreshed.

3D Effects tab

Use the **3D Effects** tab to control the three-dimensional appearance of the chart. If the current chart is a two-dimensional chart, this tab is unavailable.
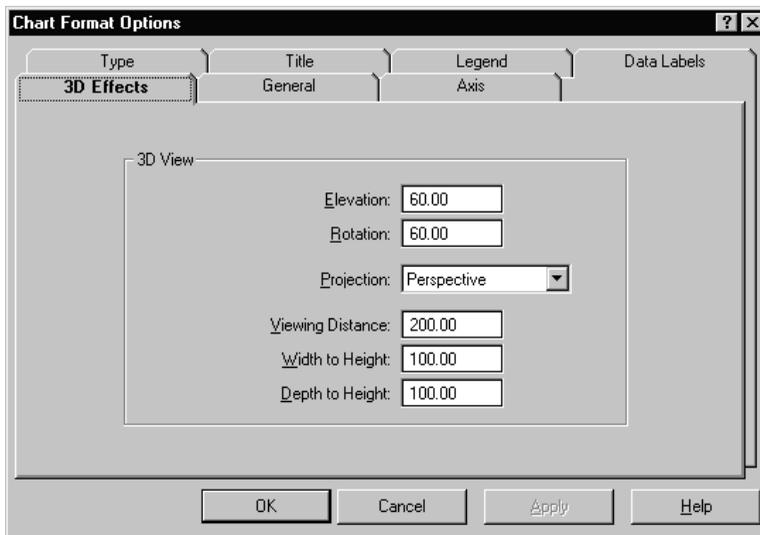
The following chart parameters can be changed:

- **Elevation**. A number from 0 through 90 degrees that describes the relative height from which a chart is viewed. An elevation of 90 looks directly down on the top of the chart. An elevation of 0 looks directly at the side of the chart. The sample charts throughout this document use an elevation of 30 degrees.

- **Rotation**. A number from -360 through 360 degrees that specifies the angle that the chart is turned relative to the viewing position. The sample charts throughout this document use a rotation of 60 degrees. Rotation does not apply to three-dimensional pie charts.

- **Projection**. Use this field to select one of three mathematical algorithms that are used to give a three-dimensional appearance on a two-dimensional sheet of paper or computer screen. You can choose the following values:

  — **Oblique**: The chart has depth but the X-Y plane does not change when the chart is rotated or elevated.

  — **Orthogonal**: Perspective is not applied to the chart, resulting in less of a three-dimensional effect. The advantage of using this type of projection is that vertical lines remain vertical, making some charts easier to read.

  — **Perspective**: This provides the most realistic three-dimensional appearance. Objects farther away from you converge toward a vanishing point.

- **Viewing Distance**. A number from 50 through 1000 that represents the distance from which the chart is viewed as a percentage of the depth of the chart.

- **Width to Height**. A number from 5 through 2000 that represents the percentage of the chart's height that is used to draw the chart's width.

- **Depth to Height**. A number from 5 through 2000 that represents the percentage of the chart's height that is used to draw the chart's depth.

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

Axis tab

Use the **Axis** tab to specify the title that displayed on each axis of the chart report.
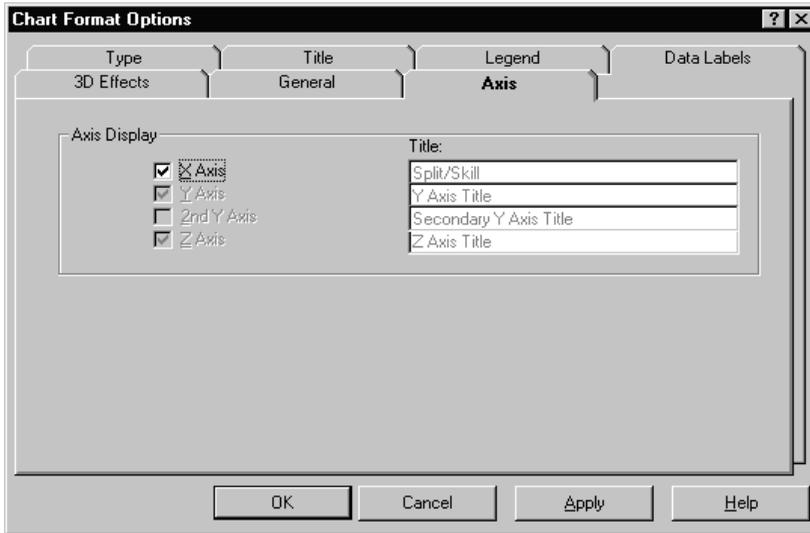
The **Axis Display** chart parameter can be changed. Use the check boxes in the Axis Display area to make each of the axes visible or invisible. The choices are **X Axis**, **Y Axis**, **2nd Y Axis**, and **Z Axis**.

Type tab

Use the **Type** tab to change the chart type.
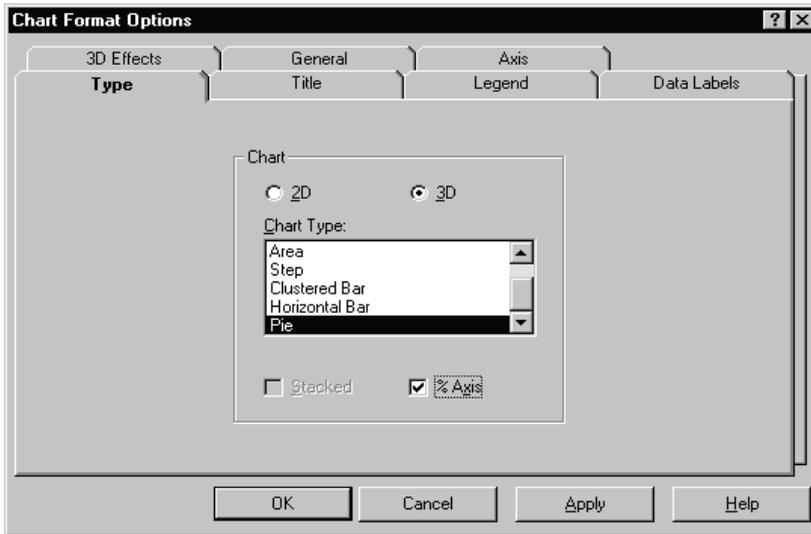
The following chart parameters can be changed:

- **2D** and **3D**. Changes the chart between two-dimensional and three-dimensional views.

  ⇒ **NOTE:**
  Two-dimensional charts update faster than three-dimensional charts. If the drawing speed seems slow, display charts as two-dimensional.

- **Chart Type**. Specifies how the data is presented. Choose a chart type from the list. The types of charts available vary depending on whether you select a two-dimensional or three-dimensional chart. The possible chart types are as follows:

  — **Bar** (two-dimensional and three-dimensional)

  — **Line** (two-dimensional and three-dimensional)

  — **Area** (two-dimensional and three-dimensional)

— **Step** (two-dimensional and three-dimensional)

— **Horizontal Bar** (two-dimensional and three-dimensional)

— **Clustered Bar** (three-dimensional only)

— **Pie** (two-dimensional and three-dimensional).

- **Stacked** check box. Causes the data for all series to be stacked rather than shown separately. This check box is unavailable for pie charts.

- **% Axis** check box. Causes the value axis (y-axis) to be displayed as percentages rather than as actual data values. This can be combined with the stacked check box to produce a percentage stacked chart.

Title tab

Use the **Title** tab to control the location of the chart title.
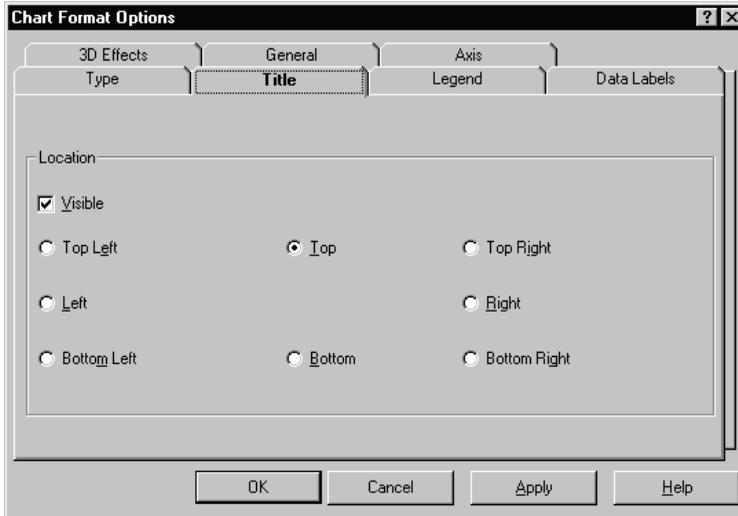
The following chart parameters can be changed:

- **Visible** check box. Allows you to display or not display report titles.

  $\Longrightarrow$ **NOTE:**
  Since the title takes up space, the chart will be smaller if you select the
  Visible option. To increase the size of the chart, do not select the Visible
  option.

- **Location**. If you choose to have report titles visible, use the **Location** area
  to select where the titles are displayed. The options are **Top Left**, **Top**
  (center), **Top Right**, **Left**, **Right**, **Bottom Left**, **Bottom** (center), and
  Bottom Right.

Legend tab

Use the **Legend** tab to control the location of the chart legend.
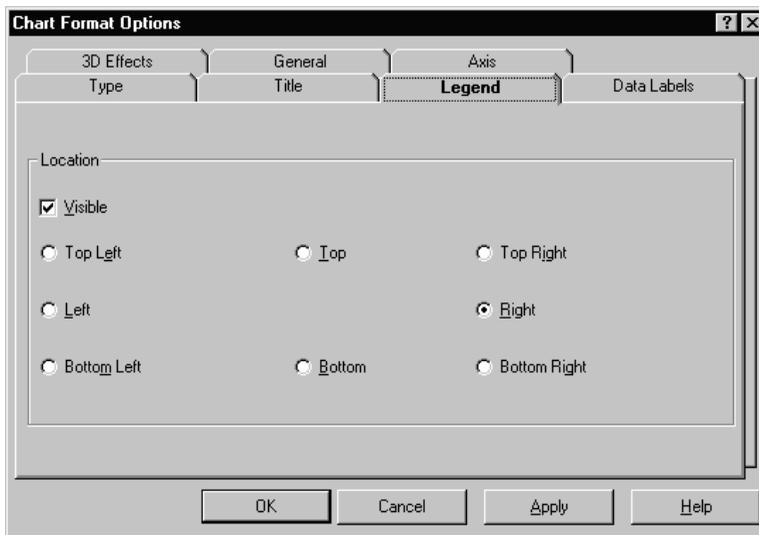
The following chart parameters can be changed:

- **Visible** check box. Allows you to display or not display report legends.

  ### $\Rightarrow$ NOTE:
  Since legends take up space, the chart will be smaller if you select the Visible option. To increase the size of the chart, do not select the Visible option.

- **Location**. If you choose to have report legends visible, use the **Location** area to select where the legend displays. The options are **Top Left**, **Top** (center), **Top Right**, **Left**, **Right**, **Bottom Left**, **Bottom** (center), and **Bottom Right**.

Data Labels tab

Use the **Data Labels** tab to control the location of the data point labels.
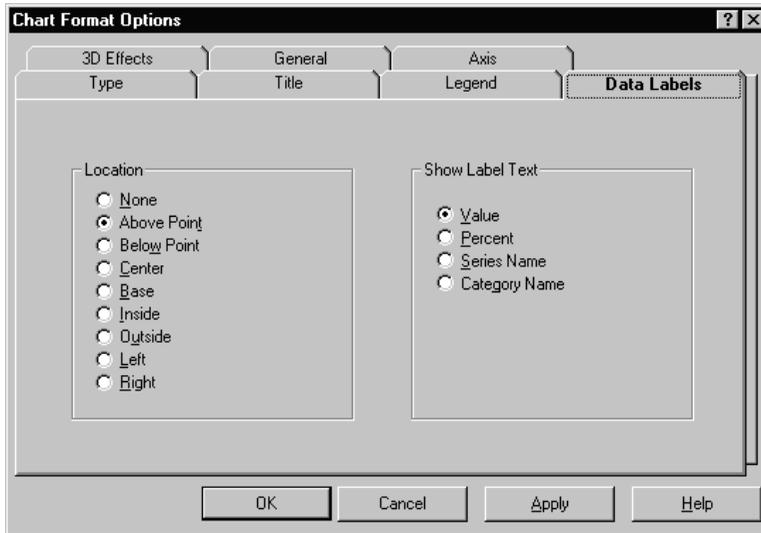
Use the **Location** area to specify the following chart parameters:

- **None**. Labels are not displayed.

- **Above Point**. Displays the label above the data point. This location is valid only for bar, line, area, and step charts.

- **Below Point**. Displays the label below the data point. This location is valid only for bar, line, area, and step charts.

- **Center**. Displays the label centered on the data point. This location is valid only for bar, line, area, and step charts.

- **Base**. Displays the label along the category axis, directly beneath the data point. This location is valid only for bar, line, area, and step charts.

- **Inside**. Displays the label inside a pie slice. This location is valid only for pie charts.

- **Outside**. Displays the label outside a pie slice. This location is valid only for pie charts.

- **Left**. Displays the label at the left of a pie slice. This location is valid only for pie charts.

- **Right**. Displays the label at the right of a pie slice. This location is valid only for pie charts.

If data labels are displayed, use the **Show Label Text** area to specify that the labels include one of the following:

- **Value**. Displays the value of the data point in the label.

- **Percent**. Displays the value of the data point in the label as a percentage.

- **Series Name**. Uses the series name to label the data point.

- **Category Name**. Uses the category name to label the data point.

⇒ NOTE:

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

Minimizing report output windows

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

When a report output window is minimized, the system displays the report's icon. The following table shows the icons that are displayed for the various report types:

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

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

Minimized report thresholds

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

The following table shows the icons that are displayed for the caution and warning thresholds:

Icon	Threshold type
	Caution threshold
	Warning threshold

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

Using right mouse button menus

When running reports, you can click the right mouse button to display a menu.

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

⟹ NOTE:

See *CentreVu® Supervisor Version 9 Reports*, 585-210-929, for descriptions of reports.

The right mouse button menus are available when you perform any of the following actions:

- **Select a cell in a table and hold down the right mouse button.** The system draws a dotted border around the cell and displays the following menu:

> Export Table Data...
> Format Table...
> Sort by...
>
> Change Agent Skills...
> Help

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

- **Select an output field or label and hold down the right mouse button.** The system draws a dotted border around the field and displays the following menu:

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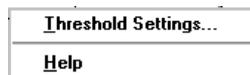
The **Threshold Settings** menu item is enabled if the highlighted field has related threshold settings.

- **Select a data point in a chart and hold down the right mouse button.**
  The system highlights the data point using selection handles, which are
  dots along the edges of the data point, and displays the following menu:

<u>E</u>xport Chart Data...
<u>F</u>ormat Chart...
<u>T</u>hreshold Settings...
Copy
<u>H</u>elp

  If you select a data point that allows report threshold highlighting to be set,
  the menu item is unavailable.

- **Select an agent name or agent number in a table and hold down the
  right mouse button.** The system highlights the agent name with a dotted
  border and displays the following menu:

Real Time Agent Information
Integrated Agent Information
<u>E</u>xport Table Data...
<u>F</u>ormat Table...
Sort by...
<u>T</u>hreshold Settings...
Change <u>A</u>gent Skills...
<u>H</u>elp

  If you do not have the EAS feature, the drill-down reports that are available
  are the Real-Time Agent Information report and the Integrated Agent
  Information report.

  From this menu, you can access either the Real-Time or the Integrated
  Agent Graphical Information report. If you double-click the agent name
  and you are running a real-time report, the default drill-down report is the
  Real-Time Agent Graphical Information report.

  See *CentreVu® Supervisor Version 9 Reports*, 585-210-929, for
  descriptions of reports.

$\implies$ **NOTE:**

You can change an agent's splits/skills while you are in a report using this method of selection. See the appropriate chapter in *CentreVu® CMS R3V9 Administration*, 585-214-015, for more information.

- **Select a cell on a table or a point on a chart that displays agent work state information and hold down the right mouse button.** The system highlights the data point using selection handles, which are dots along the edges of the data point, and displays the following menu:

Agent Work State
Export Table Data...
Format Table...
Sort by...
Threshold Settings...
Change Agent Skills...
Help

If you have the EAS feature, the Real-Time AUX Agent drill-down report is also available.

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

- **Select a cell on a table or a point on a chart that displays Top Agent work state information and hold down the right mouse button.** The system highlights the data point using selection handles, which are dots along the edges of the data point, and displays the following menu:

Top Agent Work State
Export Table Data...
Format Table...
Sort by...
Threshold Settings...
Change Agent Skills...
Help

If you have the EAS feature, the Real-Time AUX Agent drill-down report is also available.

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

Rotating a three-dimensional chart

The rotation and elevation of any three-dimensional chart can be changed interactively using the mouse. This is easier than using the **3D Effects** tab of the Chart Format window (see "Formatting chart reports" on page 7-28 for information on using the **3D Effects** tab).

To change the rotation and elevation of a three-dimensional chart:

1. Place the pointer over a three-dimensional chart.

2. Press and hold **CTRL**.

    The pointer changes to indicate that the chart can be rotated.

3. Click and hold the left mouse button.

    A dotted three-dimensional outline is displayed around the chart.

4. Move the pointer up and down to change the chart elevation, and left and right to change the chart rotation. The dotted three-dimensional outline shows the position of the chart as you move the mouse.

5. When you find the rotation and elevation that you want, release the mouse button.

    The system redraws the chart in the new position.

The three-dimensional rotation and elevation of each chart is saved as part of the report view.

Exporting report data

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

Select the **Script** button on the Data Export window to display the Save as Script window. You can use this box to create a new script to run the selected report and then export it at a scheduled time.

$\Rightarrow$ NOTE:

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

Reports are exported from Supervisor in the following format:

- Data is exported as ASCII characters.

- For table reports, each row of data is written as one line, terminated by a carriage return (ASCII value 13).

- The field separator character is written between fields.

- The field separator does not follow the last character in the line.

- Text strings are delineated according to the specified text delimiter.

To export the data from a report:

1. Click on the table or chart within a report.

2. From the **Edit** menu, select **Export Table Data, Export Chart Data,** or **Export All Data**, as appropriate.

   You can also access the menu for exporting from the menu that is displayed when you click the right mouse button while the cursor is on a report.

The system displays the Export Data window. The Export Data window allows you to copy the data from a report to the clipboard or a file.
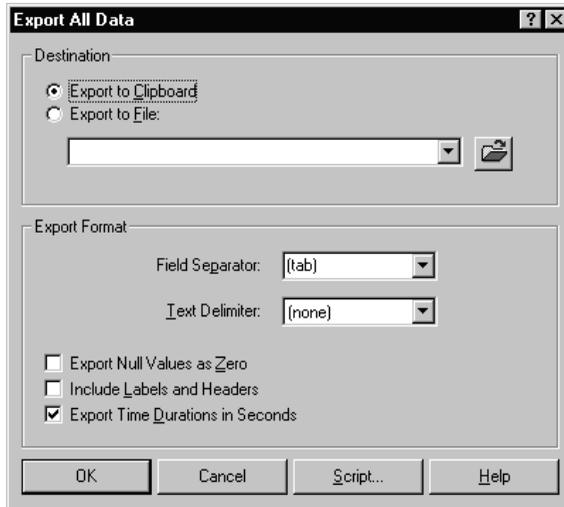
3. Complete the following parts of the Export Data window:

- **Destination**. Select to **Export to Clipboard** or **Export to File**. If you select **Export to File**, you can:

  —Type in a name for the file in the next box.

  —Select the **File** button 📂 to the right of the box to browse the files on your PC.

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

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

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

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

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

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

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

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

Copying chart reports

Chart reports can be copied to the Microsoft Windows clipboard in the
Microsoft Windows metafile (*.wmf) format. This makes it possible for you to
paste the chart image into any Microsoft Windows application that can read the
metafile format. For instance, you can copy chart reports and import the files
into word processing files to be used as viewgraphs.

To copy a chart report to the metafile format:

1. Run a chart (graphical) report.

2. Select the image that you want to copy by clicking it.

3. From the **Edit** menu, select **Copy**.

    You can also select **Copy** from the menu that is displayed when you click
    the right mouse button while the cursor is on the chart.

The system copies the chart that you selected to the clipboard.

Resizing report windows

To resize report windows:

1. Moving the cursor to the edge of the window.

2. When the resize arrow appears, hold down the left mouse button and move the mouse to size the window.

3. Release the mouse button when the window is the size you that want it to be.

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

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

Standard CMS reports

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

If you made the window smaller than the size of the report, use the scroll bars that are displayed to view the entire contents of the report.

Graphical reports

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

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

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

Changing column widths

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

Selecting a printer

The Print window is a standard feature of Microsoft Windows.

To access the Print window:

1. Select a report from **Reports**, **Dictionary**, **Exceptions**, **Call Center Administration**, or **Maintenance**.

2. Use one of the following methods to initiate the print process:

   - Select the **Print** button 🖨 on the report input window

   - From the **Report** menu select **Print**.

   The system displays the Print window.
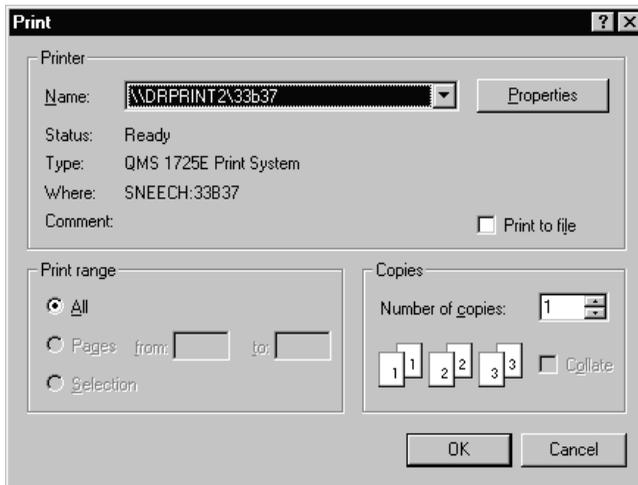
The default printer is listed in the **Name** box. To select another printer, click the down arrow to the right of the box to display a drop-down list of installed printers. You can choose any printer that has been installed in the Microsoft Windows Control Panel. Depending on what printers are installed, nonprinter devices such as files and fax may display here.

To print to a file, select the **Print to file** box.

Other entries in the **Printer** area, including **Status**, **Type**, **Where**, and **Comment,** vary depending on the chosen printer. The Microsoft Windows system software determines what is available here.

Using Page Setup

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

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

To access the Page Setup window:

1. Select a report from **Reports**, **Dictionary**, **Exceptions**, **Call Center Administration**, or **Maintenance**.

2. Complete the report input window and selecting **View Report On Screen** as the destination.

3. Select **OK** to run the report.

4. Once the report is running, from the **Report** menu, select **Page Setup**.

   The system displays the Page Setup window:

Page Setup	? X

   The Page Setup settings affect how all reports will be printed. Appearance on screen is not affected.

   Margins (inches)

   Top: 1.00

   Bottom: 1.00

   Left: .53

   Right: .53

   Page Numbers

   ⦿ Yes

   ○ No

   Box Around Tables

   ○ Box

   ⦿ No Box

   | OK | Cancel | Help |
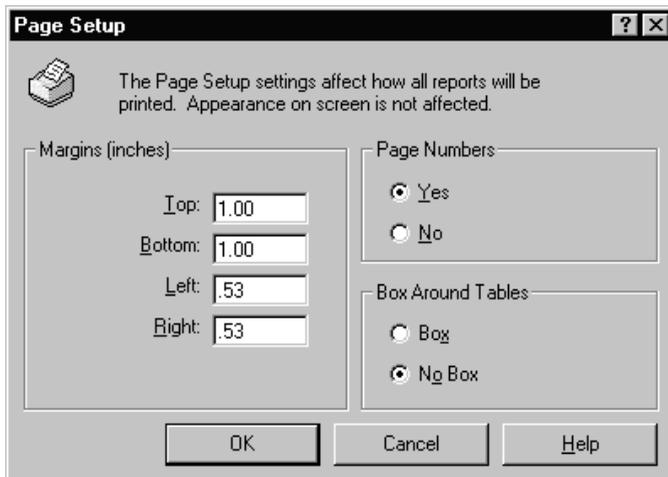
The following options are available in the Page Setup window:

- **Margins (inches)**. Use to define the spaces at the edges of the page where nothing is printed. The margin settings are defined as:

  — **Top**. The margin is measured from the top of the page. The report is offset by this amount at the top of each page.

  — **Bottom**. The margin is measured from the bottom of the page. When a printed table reaches the bottom of the page, it continues printing at the top of the next page, with the table titles repeated. If a chart overlaps the bottom margin, it is scaled smaller so that it fits within the margin. Text that reaches the bottom of the page is printed on the next page.

  — **Left**. The margin is measured from the left of the page. The report is offset by this amount on the left of each page.

  — **Right**. The margin is measured from the right of the page. Tables and text that are too wide to fit on the printed page are truncated at the right margin. Charts that overlap the right margin are scaled smaller to fit within the margin.

- **Page Numbers**. Use to specify whether to display page numbers. The following settings are valid:

  — **Yes**. Page numbers are displayed.

  — **No**. Page numbers are displayed.

- **Box Around Tables**. Use to specify whether to display a box around report tables when printed. The following settings are valid:

  — **Box**. Boxes are displayed.

  — **No Box**. Boxes are not displayed.

Setting report threshold highlights

Use the report threshold highlights feature to set visual flags that notify you when a real-time data item is out of acceptable bounds. This feature makes it possible for you to run a minimized report and be notified through color or icon changes when an item passes a specific threshold.

You can set threshold highlights for real-time data items in real-time or integrated reports only. The threshold highlights that you set tell you when data for an entity, that is, a split/skill, agent, agent group, or VDN, has reached the threshold level that you defined.

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

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

Example of setting thresholds

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

⟹ NOTE:

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

To set report threshold highlights:

1. Run a report that contains real-time data. Reports that contain real-time data are a real-time reports and integrated reports.

2. Select on a data item in the report for which you can set threshold highlights

⟹ NOTE:

When one or more data items for which threshold highlights can be set are selected, the **Threshold Settings** menu item is available. When the data item that is selected does not allow thresholds, an error message is displayed. See the "Available agent threshold settings" on page 7-62, "Available split/skill threshold settings" on page 7-67, and "Available VDN threshold settings" on page 7-71 tables for a list of the report outputs that allow threshold highlighting

3. From the **Tools** menu, select **Threshold Settings.** from the right mouse button or.

You can also select **Threshold Settings** from the menu that is displayed when you click the right mouse button while the cursor is on the data item.

4. Complete the Threshold Settings window:

1. Data item threshold definition
2. Item
3. Description
4. Icons
5. Thresholds

> **NOTE:**
> The Sample Size box is present only if you select a data item that is a percentage or an average.

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

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

- **Description**. Shows a description of the threshold that is currently selected.

- **Thresholds**. Shows the colors (as defined in the **Options Threshold Colors** tab, which is accessed from the **Tools** menu), icons, and current numerical settings for the threshold highlights of this item. For thresholds that are time related, the numbers that you enter are in seconds. For example, if you are entering a high caution threshold for 3 minutes, type 180 (for 180 seconds) in the **High Caution** field.

  — **Low Warning**. Contains the current value for the low warning threshold for the selected data item. If no value is defined, the field is blank. You can set the value to any positive integer from 0 to 999,999,999 or leave it blank. If the field is blank, no threshold is set.

  — **Low Caution**. Contains the current value for the low caution threshold for the selected data item. If no value is defined, the field is blank. You can set the value to any positive integer from 0 to 999,999,999 or leave it blank. If the field is blank, no threshold is set.

  — **High Caution**. Contains the current value for the high caution threshold for the selected data item. If no value is defined, the field is blank. You can set the value to any positive integer from 0 to 999,999,999 or leave it blank. If the field is blank, no threshold is set.

  — **High Warning**. Contains the current value for the high warning threshold for the selected data item. If no value is defined, the field is blank. You can set the value to any positive integer from 0 to 999,999,999 or leave it blank. If the field is blank, no threshold is set.

- **Sample Size**. Contains the current value for the sufficient sample size value. You can set this to any value from 0 to 999. When you set this value, you are defining a minimum number of items that must be currently tracked before the threshold highlighting is enabled. **Sample Size** is only available if the data item that you selected is a percentage or an average.

5. Select **OK**.

Tips for setting report threshold highlights

The following information is helpful when you are setting report threshold highlights.

- Before you can administer threshold highlights for a data item, you must first click the data item in the report to select it. When a data item is highlighted in a table (standard) report, it is outlined with a dotted line. When a data item is highlighted in a chart (graphical) report, it has "pull-bars" around the perimeter.

- See "Available agent threshold settings" on page 7-62, "Available split/skill threshold settings" on page 7-67, and "Available VDN threshold settings" on page 7-71 for more information on the real-time data items in reports for which you can set threshold highlights.

- In standard reports, you can select items from the table or from the output information at the top of the report.

- In chart reports, you can select items from the pie charts, bar charts, graphical reports, or tables.

- When you set threshold highlights for an entity, that is, for a split/skill, an agent, an agent group, or a VDN, that set of threshold highlights applies to every report that is run specifically for that entity.

- The report threshold highlights are updated each time that the report is refreshed.

- The numbers that you define for the threshold highlights must increase from left to right. So, the number that you use for **Low Warning** must be less than the number that you use for **High Warning**.

- You can set the label colors by choosing **Options** from the **Tools** menu on the Supervisor Controller window. Depending on how you define the colors, you can set the sample size threshold to behave in the following ways:

  — If you want to be alerted to the fact that a particular calculation is not statistically significant, set the **Insufficient** color to a different color than any other threshold condition. This causes data with insufficient sample size to be highlighted in a special color.

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

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

  — If the data calculation contains a nonzero **Sample Size** threshold, the denominator of the specified calculation is compared to the **Sample Size** threshold. If the denominator is less than the **Sample Size** threshold, the value is displayed in the **Insufficient** color, indicating that the sample size is insufficient for the value to be significant.

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

Available agent threshold settings

All of the data that Supervisor uses for agent threshold highlights are retrieved from the `cagent` (current interval agent) database table. See *CentreVu® CMS R3V9 Database Items and Calculations*, 585-210-945 for more information on the database tables. The following table lists the agent threshold highlights that you can set.

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

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

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

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

Threshold	Description/database item or calculation
Average talk time	*Description* — Average length of time that the agent spends talking on ACD calls. ⟹ **NOTE:** **Sample Size** thresholds apply to this threshold. *Measures* — AVG_AGENT_TALK_TIME calculation.

Available split/skill threshold settings

All of the data that Supervisor uses for split/skill threshold highlights is retrieved from the csplit (current interval split) database table. See *CentreVu® CMS R3V9 Database Items and Calculations,* 585-210-945 for more information on the database tables. The following table lists the split/skill threshold highlights that you can set.

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

Threshold	Description/database item or calculation
Average Talk Time	*Description* —Average length of time that is spent on ACD calls to the split/skill. ⮕ **NOTE:** **Sample Size** thresholds apply to this threshold. *Measures* — AVG_ACD_TALK_TIME
Average Time to Abandon	*Description* — Average length of time that callers waited before abandoning calls to the split/skill. ⮕ **NOTE:** **Sample Size** thresholds apply to this threshold. *Measures* — AVG_ABANDON_TIME
Full-Time Equivalent Agents Staffed	*Description* — Number of total full-time equivalent agents who are currently staffed for the skill. *Measures* — FTE_AGENTS
Number of Calls Forced Busy	*Description* — Number of calls to the split/skill that were given a busy signal by the switch. *Measures* — BUSYCALLS
Number of Calls Disconnected	*Description* — Number of calls to the split/skill that were disconnected by the switch. *Measures* — DISCCALLS
Percent of Calls Answered in Service Level	*Description* — Percentage of ACD calls to the split/skill that were answered within the service level. ⮕ **NOTE:** **Sample Size** thresholds apply to this threshold. *Measures* — PERCENT_SERV_LVL_SPL

Threshold	Description/database item or calculation
Percent of Calls Abandoned	*Description* — Percentage of ACD calls to the split/skill that were abandoned. $\Longrightarrow$ **NOTE:** **Sample Size** thresholds apply to this threshold. *Measures* — PERCENT_CALL_ABAN
Number of Agents Staffed	*Description* — Number of agents who are logged into the split/skill. *Measures* — STAFFED
Percent of Calls Answered	*Description* — Percentage of ACD calls that were offered to the split/skill and answered. $\Longrightarrow$ **NOTE:** **Sample Size** thresholds apply to this threshold. *Measures* — PERCENT_CALL_ANS
Call Profile Abandon per Service Level Increment	*Description* — Number of abandoned calls to the split/skill for any service level increment. A single report threshold applies to all of the values. If the number of abandoned calls for the split/skill reaches the threshold for any of the service level increments, the value for that service level increment is highlighted. *Measures* — ABNCALLS1 through ABNCALLS10
Rolling Average Speed of Answer	*Description* — Switch-based Rolling Average Speed of Answer for this split/skill. The Rolling Average Speed of Answer is the average speed of answer across intervals. *Measures* — ASA
Expected Wait Time (Low)	*Description* — Expected Wait Time for a call that is queued to this split/skill at a low priority level. *Measures* — EWTLOW

Threshold	Description/database item or calculation
Expected Wait Time (Medium)	*Description* — Expected Wait Time for a call that is queued to this split/skill at medium priority level. *Measures* — EWTMEDIUM
Expected Wait Time (High)	*Description* — Expected Wait Time for a call that is queued to this split/skill at high priority level. *Measures* — EWTHIGH
Expected Wait Time (Top)	*Description* — Expected Wait Time for a call that is queued to this split/skill at top priority level. *Measures* — EWTTOP

Available VDN threshold settings

All of the data that Supervisor uses for VDN threshold highlights are retrieved from the cvdn (current interval VDN) database table. See *CentreVu® CMS R3V9 Database Items and Calculations,* 585-210-945 for more information on the database tables. The following table lists the VDN threshold highlights that you can set.

Threshold	Description/database item or calculation
Number of Calls Abandoned During the Interval	*Description* — Number of calls that were queued to this VDN and then abandoned. *Measures* — ABNCALLS
Number of Calls Forced Busy During the Interval	*Description* — Number of calls to the VDN that were given a busy signal by the switch. *Measures* — BUSYCALLS
Number of Calls Disconnected During the Interval	*Description* — Number of calls to the VDN that were disconnected by the switch by the vector "disconnect" command. *Measures* — DISCCALLS
Oldest Call Waiting	*Description* — Number of seconds that the oldest call has waited in this VDN. *Measures* — OLDESTCALL
Number of Calls Waiting	*Description* — Number of calls queued to this VDN that have not been answered by an agent. *Measures* — INPROGRESS - ATAGENT
Percent of Calls Answered in Service Level	*Description* — Percentage of ACD calls to the VDN that were answered within the service level. $\implies$ **NOTE:** **Sample Size** thresholds apply to this threshold. *Measures* — 100*(ACCEPTABLE / INCALLS)

Threshold	Description/database item or calculation
Percent of Calls Abandoned	*Description* — Percentage of ACD calls to the VDN that were abandoned. **➡ NOTE:** **Sample Size** thresholds apply to this threshold. *Measures* — 100*(ABNCALLS / INCALLS)
Percent of Calls Answered	*Description* — Percentage of ACD calls offered to the VDN that were answered. **➡ NOTE:** **Sample Size** thresholds apply to this threshold. *Measures* — 100^a [(ACDCALLS + CONNECTCALLS) / INCALLS]
Call Profile Abandon per Service Level Increment	*Description* — Number of abandoned calls to this VDN for any service level increment. A single report threshold applies to all of the values. If the number of abandoned calls for the VDN reaches the threshold for any of the service level increments, the value for that service level increment is highlighted. *Measures* — ABNCALLS1 through ABNCALLS10
Average Speed of Answer	*Description* — Number of seconds, on average, before a call to this VDN is answered. This value is the time callers spent in queue or ringing before being answered, divided by the number of calls queued to the VDN that were answered by an agent at this VDN. **➡ NOTE:** **Sample Size** thresholds apply to this threshold. *Measures* — AVG_ANSWER_SPEED

Threshold	Description/database item or calculation
Average Talk Time	*Description* — Average length of time that is spent on ACD calls to the VDN. ⇛ **NOTE:** **Sample Size** thresholds apply to this threshold. *Measures* — AVG_ACD_TALK_TIME
Average Time to Abandon	*Description* — Average length of time that callers waited before abandoning calls to the VDN. ⇛ **NOTE:** **Sample Size** thresholds apply to this threshold. *Measures* — AVG_ABANDON_TIME
Rolling Average Speed of Answer	*Description* — Switch-based Rolling Average Speed of Answer for this VDN. The Rolling Average Speed of Answer is the average speed of answer across intervals. *Measures* — ASA

Report Options

Use the **Options** window to:

- Set the ACD and other general options to which Supervisor defaults when you log in. See "Options General tab" on page 7-75 for more information.

- Set up the colors that will be used in your graphical reports. See "Options Report Colors tab" on page 7-77 for more information.

- Set up the colors that will be used in reports to tell you when threshold highlights (not exceptions thresholds) are reached. See "Setting report threshold highlights" on page 7-56 for more information on threshold highlights.

- Choose or create a name format using {name} for Dictionary Name, {entity} for entity type, and {number} for entity number. The name format determines how items are displayed in reports. For instance, if you select the name format of {entity}{number}, all of the entities, that is splits/skills, ACDs, VDNs, vectors, trunks, trunk groups, call work codes, and AUX codes, that can be named in the Dictionary are displayed as the entity type and number instead of the Dictionary name. If you selected {name} as the name format, the names that are assigned to the entities in the Dictionary are displayed.

Options General tab

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

The following figure shows the **General** tab on the **Options** window. This figure shows the default settings for the **General** tab.
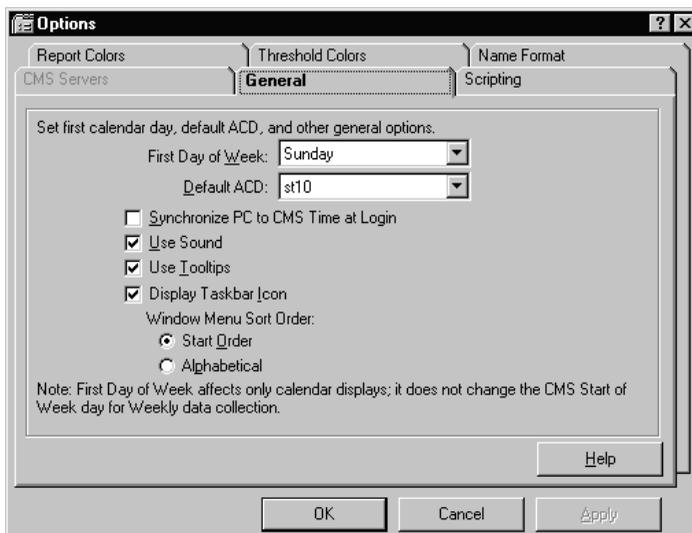
Use the **General** tab to set your first calendar day, default ACD, and other general options.

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

  Use the drop-down list to make your selection.

- **Default ACD**. When you select an ACD, that ACD is the default that is listed in the functions windows and drop-down list options.

  Use the drop-down list to make your selection.

- **Synchronize <u>T</u>ime PC and CMS Time at Login**. Select this check box to set the PC's clock to read the same time as the CMS clock. If you do not activate this selection, the PC clock and the CMS clock may not read the same time. This does not affect the CMS clock.

- **<u>U</u>se Sound**. Select this check box to receive an audible alert when the **Exceptions Indicator** box is updated. The **Exceptions Indicator** box is on the Controller status bar. The sound that you hear is the sound that you chose for the exclamation event that is associated with your PC.

  $\Rightarrow$ **NOTE:**
  Threshold Highlighting does not use sound. It uses color only as an indicator of a threshold being met.

- **Use <u>T</u>ooltips**. Select this check box to make tooltips visible. For example, when you are working in the Supervisor Controller window, you can place your mouse cursor over a toolbar button and the system displays a yellow box that provides a brief description of that button.

- **Use Taskbar <u>I</u>con**. Select this check box to use the Supervisor system tray icon feature. See Chapter 5, "Getting started with CentreVu Supervisor" for more information on using the Supervisor system tray icon.

- **Window Menu Sort Order**. Use this item to determine how the items that display in the system tray icon menu are sorted. This item is only available is you select the **Use Taskbar <u>I</u>con**.

  — **Start <u>O</u>rder**. Select this button to display the items in the system tray icon menu in the order in which you started them from Supervisor.

  — **<u>A</u>lphabetical**. Select this button to display the items in the system tray icon menu in alphabetical order, regardless of the order in which you started them.

Options Report Colors tab

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

The following figure shows the **Report Colors** tab on the **Options** window. This figure shows the default settings for the **Report Colors** tab.
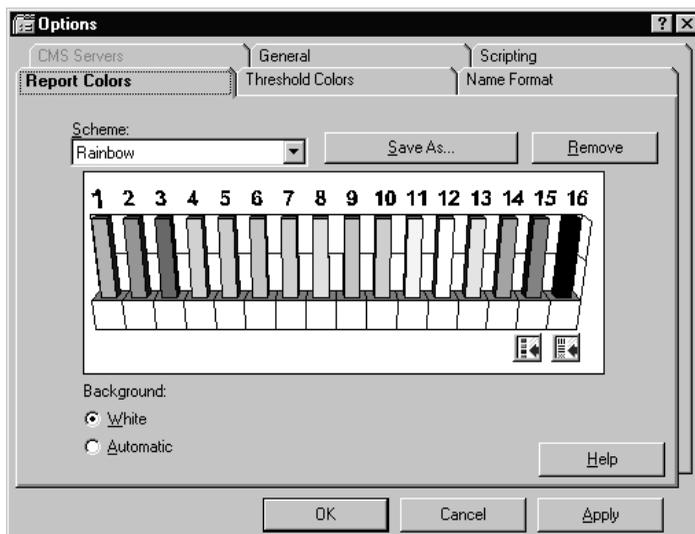
Use the **Report Colors** tab to set up the colors that are used in your graphical reports.

- **Scheme.** There are two ways to select the report color scheme that you want to use for Supervisor reports:

  — From a series of predefined color schemes. Use the **Scheme** drop-down list to select a different scheme from the one that is currently displayed.

  — By creating a new color scheme. See "Creating a new report color scheme" on page 7-82 for instructions on creating report color schemes.

- **Background.** There are two choices for the background color of reports:

  — **White.** Select this button to make the background of all reports white.

  — **Automatic.** Select this button to make the background of all reports match the color that you set up for the PC in Microsoft Windows.

Options Threshold Colors tab

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

The following figure shows the **Threshold Colors** tab on the **Options** window. This figure shows the default settings for the **Threshold Colors** tab.
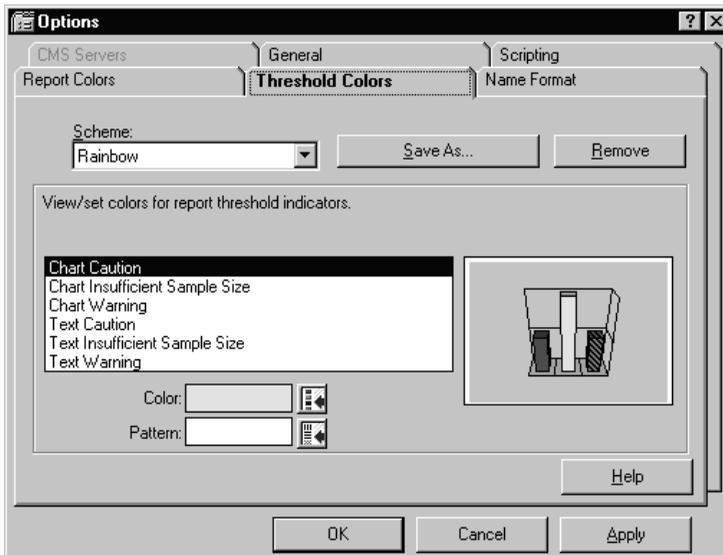
Use the **Threshold Colors** tab to set up the colors that are used in reports to tell you when exceptions thresholds are reached.

- **Scheme.** There are two ways to select the report color scheme that you want to use for Supervisor reports:

  — From a series of predefined color schemes. Use the **Scheme** drop-down list to select a different scheme from the one that is currently displayed.

  — By creating a new color scheme. See "Creating a new report color scheme" on page 7-82 for instructions on creating report color schemes.

Options Name Format tab

$\Longrightarrow$ **NOTE:**

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

The following figure shows the **Name Format** tab on the **Options** window. This figure shows the default settings for the **Name Format** tab.
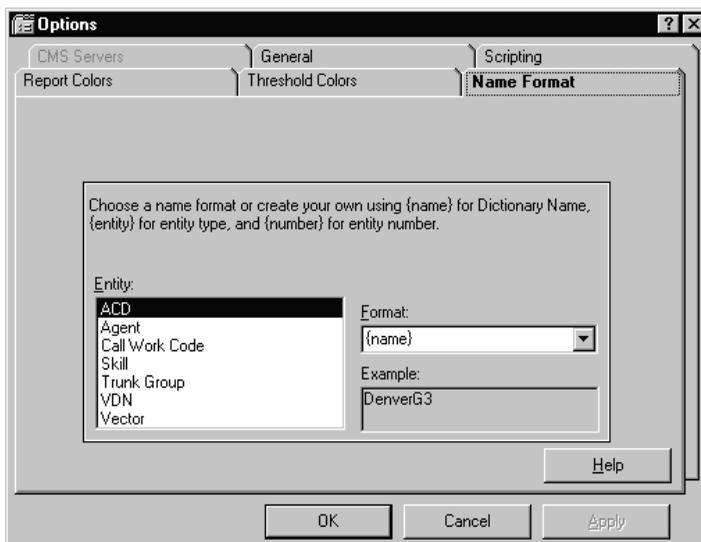
Use the **Name Format** tab to choose or create formats for how CMS entities, that is, splits/skills, ACDs, VDNs, vectors, trunks, trunk groups, call work codes, and AUX codes, are displayed in Supervisor. The display can be set to any one or a combination of {name} for Dictionary Name, {entity} for entity type, and {number} for entity number.

Defining the name format

To define the name format for entities:

1. From the **Entity** box, select the item for which you want to set formats.

2. In the **Format** text box, use one of the following methods to select a format:

   - Type the format that you want ({name}, {entity}, and/or {number}), or

   - Use the drop-down list to choose from a set of preformatted options.

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

     The **Example** box provides an example of what the format looks like based on your current definition.

3. Perform one of the following actions, depending on whether you want to save the changes:

   - Select **OK** to save your changes.

   - Select **Cancel** to clear your changes.

Creating a new report color scheme

To create a new color scheme for reports:

1. Use one of the following methods to open the **Options** window:

    *   From the **Tools** menu, select **Options.**

    *   Select the **Options** button [icon] on the toolbar.

2. Select the **Report Colors** tab.

3. From the **Scheme** drop-down list, select the color scheme with which you want to begin.

    The system displays the view of the scheme:
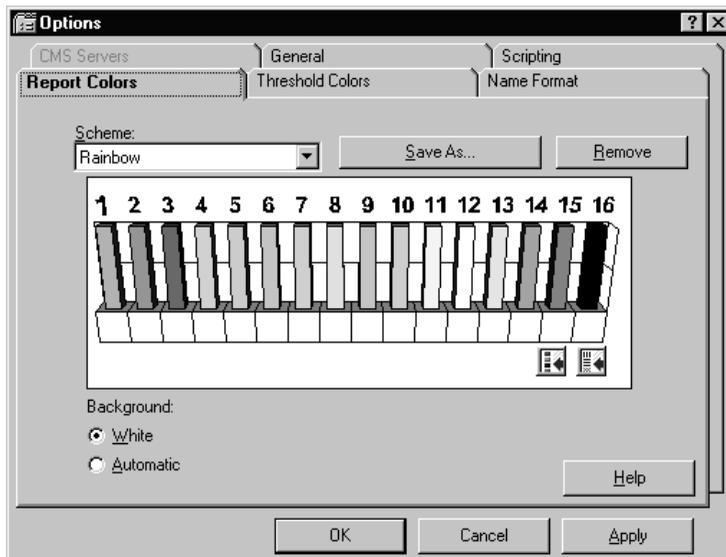
4. From the **Background** options list, select **White** or **Automatic**.

5. Click the color bar (1 through 16) that you want to modify.

6. Select either the **Color Selector** or the **Pattern Selector** button.

   If you select the **Color Selector** button, the system displays the following window:
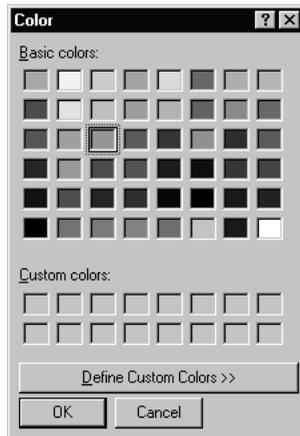
   If you select the **Pattern Selector** button, the system displays the following box:
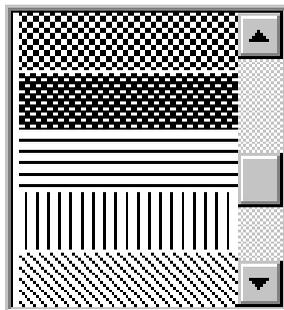
7. Perform one of the following actions to select a new color or pattern.

   • Choose from the Basic colors palette.

   • Create a custom color using standard Microsoft Windows procedures.

   • Click the pattern that you want from the Pattern Selector window.

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

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

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

The system displays the following window:


```
Save Scheme As                          ? ✕

What would you like to call the new          OK
scheme?
                                          Cancel




New Rainbow
```
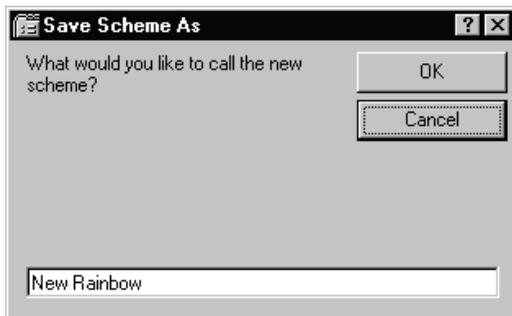
10. Type the name of the report color scheme that you created in the text box.

11. Select **OK** to save the scheme and the scheme name.

⇒ NOTE:
To view the changes that you made to a color scheme at any point in the modification, select **Apply**. When you do this, the current color scheme is applied to any reports that are running.

Creating a new threshold color scheme

To create a new threshold color scheme for reports:

1. Use one of the following methods to open the **Options** window:

   • From the **Tools** menu, select **Options.**

   • Select the **Options** button [icon] on the toolbar.

2. Select the **Threshold Colors** tab.

3. From the **Scheme** drop-down list, select the color scheme with which you want to begin.

   The system displays the view of the scheme:
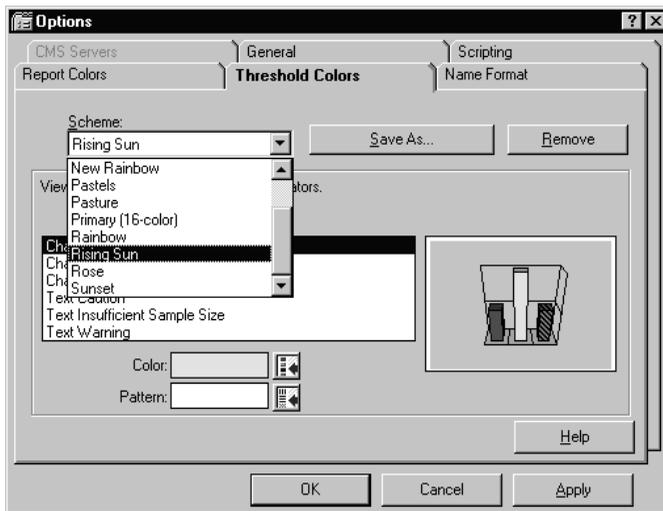
4. Select the element of threshold highlighting that you want to modify colors for from the list box.

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

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

   a. Select the **Color Selector** button that is next to the Text display box.

      The system displays the following window
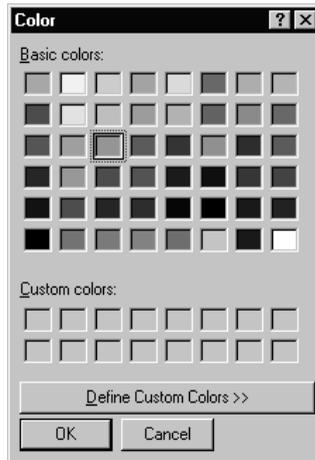
   b. Perform one of the following actions to select a new color.

      - Choose from the Basic colors palette.

      - Create a custom color using standard Microsoft Windows procedures.

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

      The system displays the **Options** window.

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

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

   The system displays the Color palette.

   b. Perform one of the following actions to select a new color.

   - Choose from the Basic colors palette.

   - Create a custom color using standard Microsoft Windows procedures.

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

   The system displays the **Options** window.

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

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

   The system displays the Save Scheme As window:
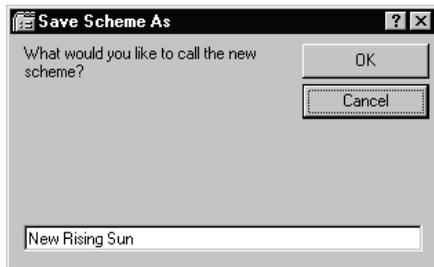
9. Type the name of the threshold color scheme that you created in the text box.

10. Select **OK** to save the scheme and the scheme name.

   $\Longrightarrow$ **NOTE:**
   To view the changes that you made to a color scheme at any point in the modification, select **Apply**. When you do this, the current color scheme is applied to any threshold highlights that are displayed on running reports.

Creating a new name format

To create a new name format:

1. Use one of the following methods to open the **Options** window:

   - From the **Tools** menu, select **Options.**

   - Select the **Options** button 🔳 on the toolbar.

2. Select the **Name Format** tab.

3. In the **Entity** list, select the CMS entity for which you want to change the name format.

4. In the **Format** text box, use the drop-down list to select one of the standard formats, or type in a name combination.

5. Select **OK**.

6. If you typed a nonstandard name format in Step 4, the format is not saved in the **Format** list as a standard option.

   To select another name format, select the **Name Format** tab, select the format, and then select **OK**.

Exiting and restarting reports

To exit a report and return to the Supervisor Controller window:

1. Perform one of the following actions:

   - Double-click the **System** button.

   - Select **Close** from the **System** button menu.

   - Select **Exit** from the **Report** menu.

   ⇒ **NOTE:**
   > If the system shuts down due to an error, any changes that you made to the report or reports that you are running are saved.

To restart a report, that is, return to the report input window:

1. From the **Report** menu, select **Restart**.

   ⇒ **NOTE:**
   > Work State drill-down reports and unsaved reports that were created in the Report Wizard cannot be restarted.

CentreVu
Supervisor

Installing and using CentreVu Terminal Emulator

Overview

This chapter explains how to install the CentreVu Terminal Emulator (Terminal) software and gives an overview of Terminal. It also provides procedures for how to set up profiles for using Terminal.

This chapter includes the following sections:

- "Using CentreVu Terminal Emulator with CentreVu Supervisor" on page 8-3

- "Installing Terminal Emulator" on page 8-4

- "Opening and exiting CentreVu Terminal Emulator and CentreVu CMS" on page 8-5

- "Using CentreVu Terminal Emulator" on page 8-10

- "CentreVu Terminal Emulator messages" on page 8-24

About CentreVu Terminal Emulator

Terminal is packaged with the CentreVu Supervisor (Supervisor) software.

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

$\Longrightarrow$ **NOTE:**
Terminal must be separately installed. It is not automatically installed with Supervisor Version 9.

---

*Microsoft Windows is a trademark of Microsoft Corp.

Using CentreVu Terminal Emulator with CentreVu Supervisor

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

- ACD Administration — Vector Contents.

  ### $\Longrightarrow$ NOTE:

  You can also use Visual Vectors to access vector information and edit vectors.

- cmsadm and cmssvc command capabilities.

- Solaris[*] system command capabilities.

- INFORMIX[†] database commands.

- Forecast.

- Shortcuts.

- Timetables.

- Creating and editing CMS custom reports.

- Administering ACDs for Generic 2.2 switches with the Expert Agent Selection (EAS) feature. For all of the other switches with EAS, you may use Supervisor to perform ACD Administration operations (except for Vector Contents) and run the applicable configuration reports.

---

* Solaris is a registered trademark of Sun Microsystems, Inc.

† INFORMIX is a registered trademark of Informix Software, Inc.

Installing Terminal Emulator

To install Terminal:

1. In the directory that contains the Supervisor files, find the Terminal setup file, **SetupTrm.exe**.

2. Double-click the **SetupTrm.exe** file to begin the installation.

   After a short wait, the system displays the Terminal Emulator Setup Welcome window.

3. Select **Next** to proceed with the installation.

4. Follow the instructions that the system displays on the windows to install Terminal.

   When the Installation is finished, the system displays the Installation Completed window.

5. Select **Finish t**o return to your desktop.

You can now begin using Terminal.

CentreVu Supervisor V9 Installation and Getting Started
Installing and using CentreVu Terminal Emulator
Opening and exiting CentreVu Terminal Emulator and CentreVu CMS   8-5

Opening and exiting CentreVu Terminal Emulator and CentreVu CMS

This section includes the following information:

CentreVu Supervisor V9 Installation and Getting Started
Installing and using CentreVu Terminal Emulator
Opening and exiting CentreVu Terminal Emulator and CentreVu CMS   8-6

Opening CentreVu Terminal Emulator

To open Terminal:

1. From the Microsoft Windows[*] **Start** menu, select **Programs > Avaya CentreVu Supervisor 9.0**.

2. Select **CentreVu Terminal** from the **Avaya CentreVu Supervisor** menu.

    The system displays the Terminal window with no connection active:
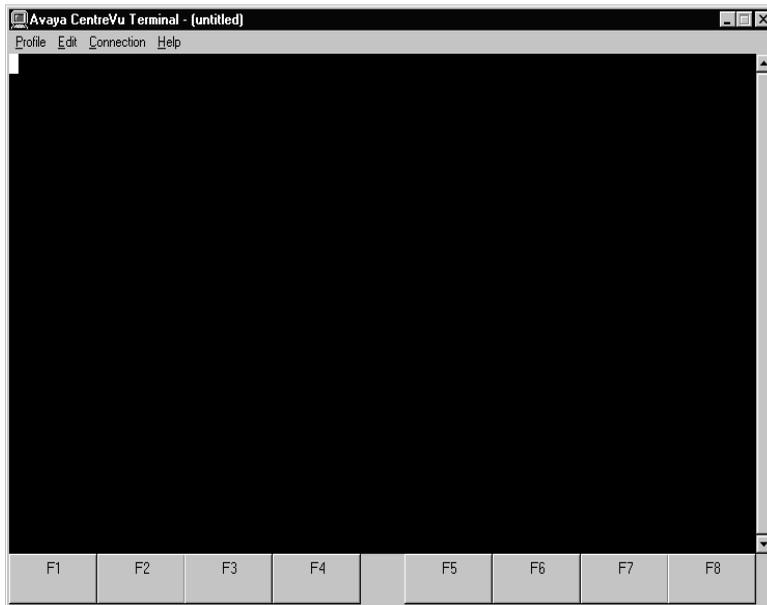
The size of the Terminal window is fixed at 24 rows by 80 columns, but the system resizes the window based on font size.

CentreVu Supervisor V9 Installation and Getting Started
Installing and using CentreVu Terminal Emulator
Opening and exiting CentreVu Terminal Emulator and CentreVu CMS   **8-7**

Logging in to CentreVu CMS

To log in to CMS:

1. From the **Profile** menu, select **Open**.
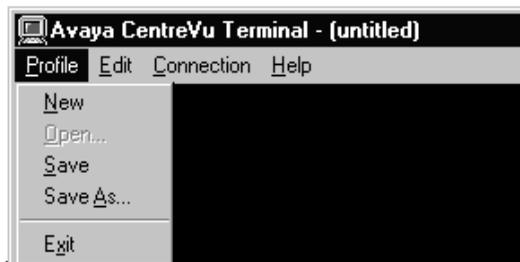
➡ NOTE:

If you do not have a profile created, see "Creating profiles" on page 8-15.

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

➡ NOTE:

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

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

CentreVu Supervisor V9 Installation and Getting Started
Installing and using CentreVu Terminal Emulator
Opening and exiting CentreVu Terminal Emulator and CentreVu CMS   8-8

2. At the `login:` prompt, type your CMS login ID, and press **Enter**.
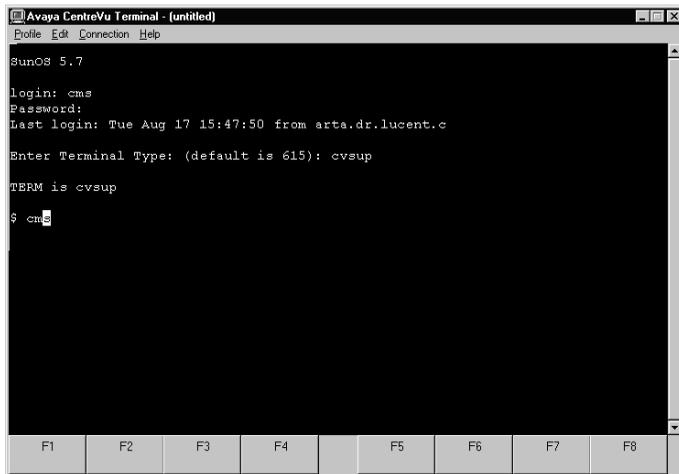
3. At the `Password:` prompt, type your CMS password (it does not display on the screen), and press **Enter**.

4. At the `Terminal type:` prompt, type **615c** or **CVTERM**, and press **Enter**.

⟹ NOTE:

Terminal does not use cvsup as the terminal type.

The system displays the CMS Main Menu.

⟹ NOTE:

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

CentreVu Supervisor V9 Installation and Getting Started
Installing and using CentreVu Terminal Emulator
Opening and exiting CentreVu Terminal Emulator and CentreVu CMS   8-9

Exiting Terminal

To exit Terminal:

1. From the CMS Main Menu, select **Logout**.

   The system displays a window indicating that the CMS connection was dropped.

   ## ⇒ NOTE:

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

2. Perform one of the following actions:

   - Select **OK**

   - Press **Enter**

3. From the **Profile** menu, select **Exit**.

   ## ⇒ NOTE:

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

Using CentreVu Terminal Emulator

This section contains the following information:

- "CentreVu Terminal Emulator window" on page 8-10

- "Creating profiles" on page 8-15

- "Editing profiles" on page 8-17

- "Setting profile options" on page 8-18

CentreVu Terminal Emulator window

The following figure shows the Terminal window:
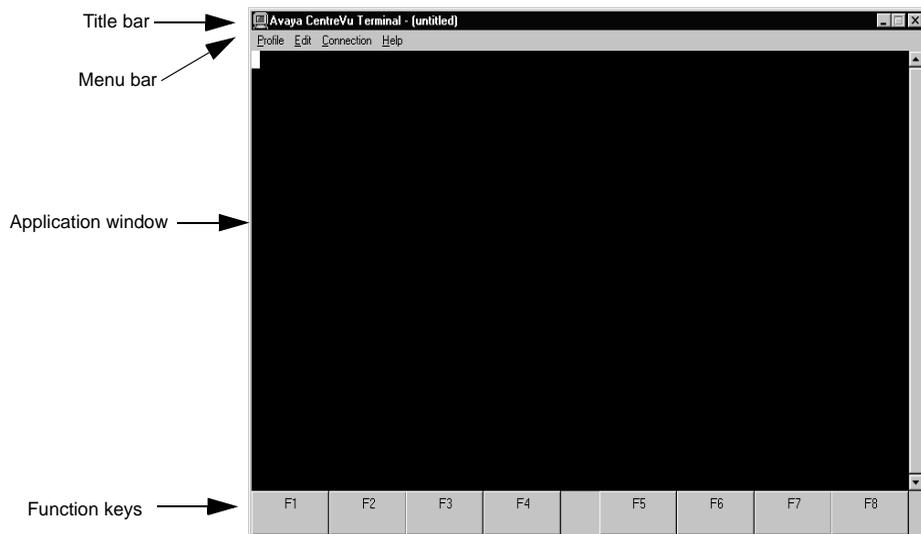
The Terminal window contains the following items:

- **Title bar**. Displays "Avaya CentreVu Terminal" and the name of the current connection profile. If no profile is currently selected, "untitled" is displayed instead of the profile name.

- **Menu bar**. Includes the **Profile**, **Edit**, **Connection**, **Reset,** and **Help** menus.

- **Application window**. The area of the screen where you log in to CMS and use CMS.

- **Function keys**. The keys at the bottom of the Terminal's main window. Initially, these keys are not visible. After you have logged into CMS, the function keys are appropriately labeled and work the same as the standard CMS Screen-Labeled Keys (SLKs).

  See *CentreVu® CMS R3V9 Administration*, 585-214-015, for definitions of and instructions for using the function keys and their associated menus.

Menu bar

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

Profile menu

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

Menu item	Action
New	Creates a new connection profile. By default, this connection profile is named "profile 1" until you save it. This item is unavailable if a connection is already active.

Menu item	Action
Open...	Opens an existing connection profile. The system displays a window with the current profiles listed when this menu item is selected. Once you select a profile to open, that profile becomes the first profile in the list of recently accessed profiles. This item is unavailable if there is already a connection active.
Save	Saves the current connection profile.
Save **A**s...	Brings up a window that requests a name under which to save the profile. Existing profile names are listed in the Save Profile As window. You can select one of these names or enter a new profile name in the **Profile Name** text box. If you use an existing profile name, the system displays a message that warns you that you are overwriting the contents of an existing profile.
1...4	Displays the four most-recently opened connection profiles. You can choose a numbered profile for quick access. The most recently selected profile that you choose becomes profile number 1, and the other items are renumbered accordingly. These items are unavailable if there is a connection already active.
E**x**it	Exits Terminal. If there is a profile that was modified but not saved, a warning message is displayed.

CentreVu Supervisor V9 Installation and Getting Started
Installing and using CentreVu Terminal Emulator
Using CentreVu Terminal Emulator   **8-13**

<u>E</u>dit menu

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

Menu item	Action
<u>C</u>opy	Copies the selected text to the Microsoft Windows clipboard.
<u>P</u>aste	Pastes (sends) the contents of the Microsoft Windows clipboard to the location of your cursor on your PC as if you had typed it in.
C<u>l</u>ear	Clears the contents of the Microsoft Windows clipboard.

<u>C</u>onnection menu

From this menu you can connect to, disconnect from, or send a break to a remote host computer. You also use this menu to set up or change Terminal options, that is, communications, modem, and font. The following table lists the items on the <u>C</u>onnection menu and describes the action that each item performs.

Menu item	Action
<u>C</u>onnect	Establishes a connection to a remote host computer as specified in the active connection profile. If a connection is already active, this menu item is unavailable.
<u>D</u>isconnect	Disconnects the active connection. If there is no active connection, this menu item is unavailable.

Menu item	Action
Send <u>B</u>reak	Sends a "break" sequence to a remote host computer. A break is used to temporarily suspend an operation or transmission. If your connection is "hung up" and the host appears not to respond when you press keys on your keyboard, try sending a break.
<u>O</u>ptions...	Brings up a window from which you can set up or change Terminal options. Terminal options are grouped under three tabs: Communications, Modem, and Font.

Reset menu

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

<u>H</u>elp menu

From this menu, you can get online Help for Terminal. The following table lists the items on the <u>H</u>elp menu and describes the action that each item performs.

Menu item	Action
<u>C</u>ontents	Displays a table of contents of Help topics.
<u>T</u>echnical Support	Shows how to get Terminal technical support.
<u>A</u>bout...	Opens the Terminal Help About window.

Creating profiles

To create a profile:

1. Open **Terminal**.

2. From the **Profile** menu, select **New**.
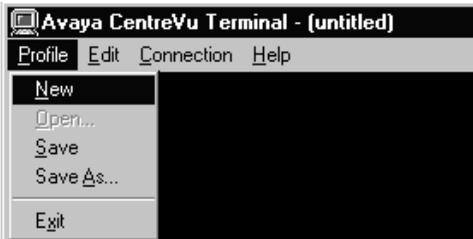
The system displays the Options window:
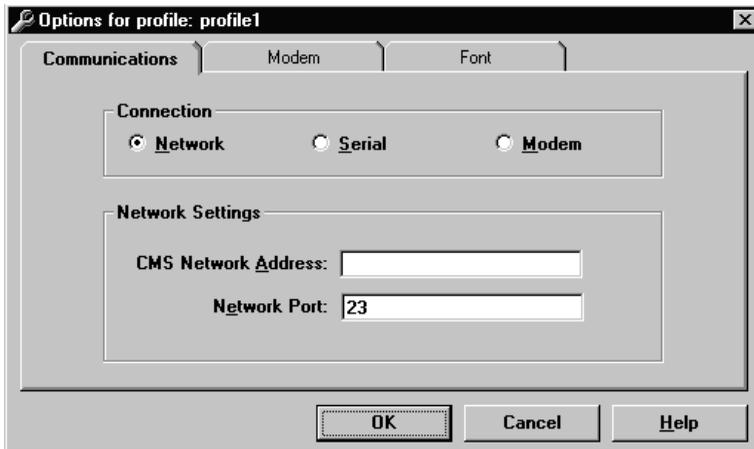
3. Set the Terminal options.

 NOTE:

The Terminal **Options** are grouped under three tabs: Communications, Modem, and Font. See "Communications tab" on page 8-19, "Modem tab" on page 8-21, and "Font tab" on page 8-22 for procedures on setting the options in each tab.

4. Select **Save As** from the **Profile** menu.
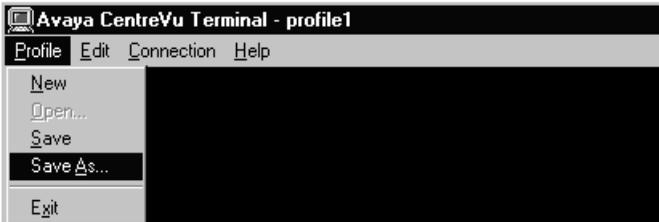
The system displays the Save Profile As box:
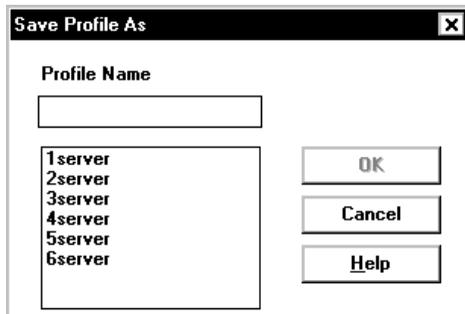
5. Type the name of the profile in the **Profile Name** text box

6. Select **OK**.

 NOTE:

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

Editing profiles

To edit an existing profile:

1. From the **Profile** menu, select **Open**.

2. Choose the name of the profile that you want to edit.

3. Select **Open**.

4. From the **Connection** menu, select **Options**.

5. Edit the profile.

6. Select **OK**.

7. From the **Profile** menu, select **Save.**

Setting profile options

From the **Connection** menu, select **Options** to set up how you will connect to the CMS host computer. The following sections describe the options that are available and give illustrations of settings for standard Terminal profiles.

The following figure show the **Options** window with the **Communications** tab active.

Communications tab   Modem tab   Font tab
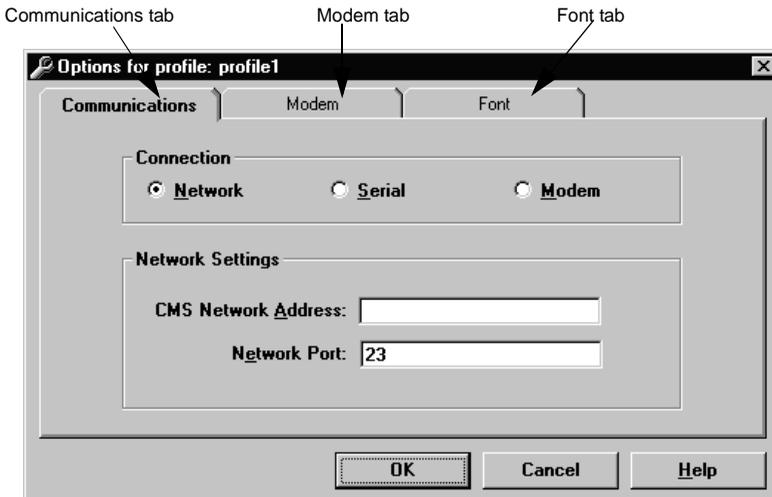
When you are working in any of the windows, the following conventions are used:

- Select **OK** to set your current settings in the selected profile and close the **Options** window.

- Select the **Cancel** button to close the window without accepting the current settings.

- Select the **Help** button to open a Help window that provides help on the currently selected folder tab.

Communications tab

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

Sel**ect** **<u>N</u>etwork**, **<u>S</u>erial**, or **<u>M</u>odem** from the Connection box. The following sections provide explanations and examples of the settings that are required for each type of connection.

Network connection settings

Select **<u>N</u>etwork** if you are connecting to the remote CMS through a network. The following figure shows an example of standard settings for a network connection:
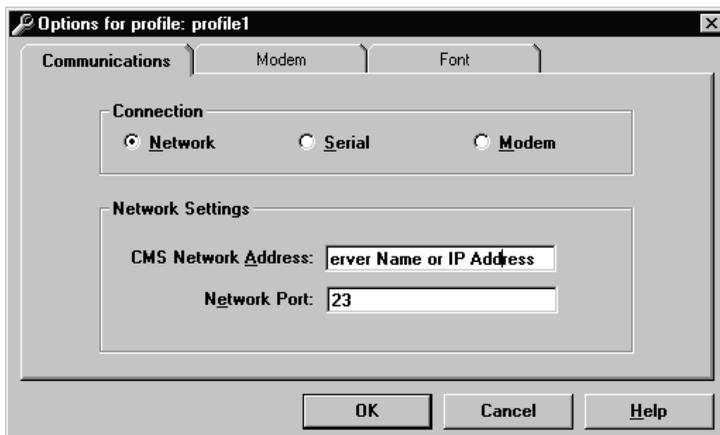
In the **Network Settings** area, enter the following required information for this setting:

- **CMS Network <u>A</u>ddress.** Enter the name or the Internet Protocol (IP) address of the remote host. There is no default.

- **N<u>e</u>twork Port**. Enter the network port that you want to connect. The default is 23, which is the network port reserved for Telnet.

⟹ **NOTE:**

Do not change these settings unless you are instructed to do so by your network administrator.

Serial and Modem connection settings

Select **Serial** if you are connecting to the remote CMS through a serial connection. Select **Modem** if you are connecting to the remote CMS using a modem. The following figure shows an example of standard settings for a serial or modem connection:
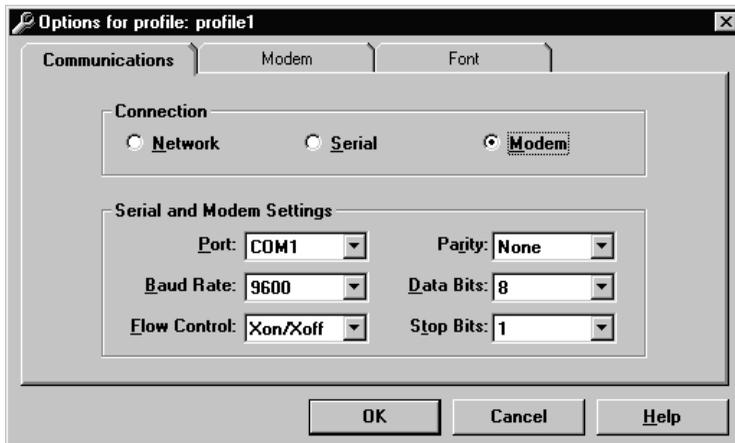
In the **Serial** and **Modem Settings** area, enter the following required information for this setting:

- **Port**. Select the communication (COM) port you will use to connect to the CMS server from the drop-down list. The options are COM1, COM2, COM3, and COM4.

- **Baud Rate**. Select the baud rate from the drop-down list. The options are 110, 300, 600, 1200, 2400, 4800, 9600, and 19.2K.

- **Flow Control**. Select the flow control from the drop-down list. The options are None, Xon/Xoff (software), Rts/Cts (hardware), or Both.

- **Parity**. Select the parity setting from the drop-down list. The options are None, Odd, Even, Mark, and Space.

- **Data Bit**. Select the number of data bits from the drop-down list. The options are 5, 6, 7, and 8.

- **Stop Bits**. Select the number of stop bits from the drop-down list. The options are 1, 1.5, and 2.

$\Longrightarrow$ **NOTE:**

Do not change these settings unless you are instructed to do so by your network administrator.

Modem tab

Select the **Modem** tab to set up or change dial strings for connecting to the remote CMS through a modem port. The following figure shows an example of standard modem settings:
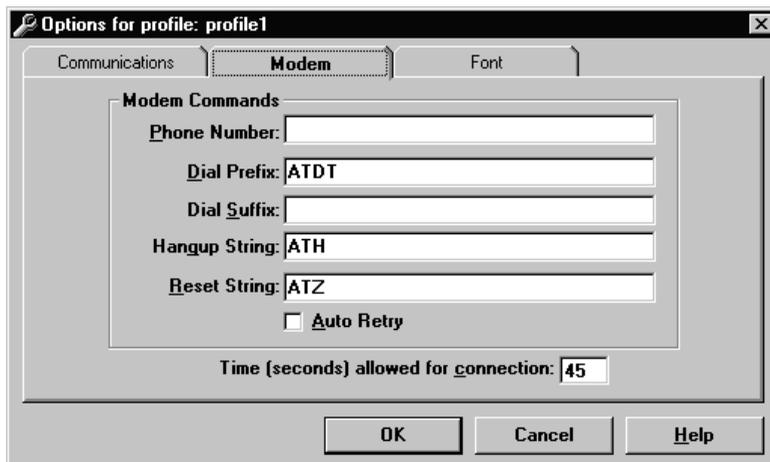
Use the following information to set up the modem connection:

- **Phone Number**. Enter the telephone number of the remote host.

- **Dial Prefix**. Enter the characters to send to the modem before the telephone number of the remote host. For example, if a "9" must be dialed before the telephone number, enter **9** after the phrase ATDT (**ATDT9**).

- **Dial Suffix**. Enter the characters to send to the modem after the telephone number of the remote host. For example, if an extension must be dialed after the telephone number of the remote host, enter it here.

- **Hangup String**. Enter the characters to send to the modem to cause it to hang up the connection. The default is ATH.

- **Reset String**. Enter the characters to send to the modem to cause it to reset itself. The default is ATZ.

- **Auto Retry**. Turns the auto retry option on or off. If the check box is not selected, the modem tries only once to establish a connection to the remote host.

- **Time (seconds) allowed for connection**. Enter the maximum time to wait for the connection to be established. The valid values are 1 to 999 seconds. The default value is 45 seconds.

Font tab

Select the **Font** tab to change the font size that is used by Terminal when you are logged in to CMS. The following figure shows an example of the standard font settings for Terminal:
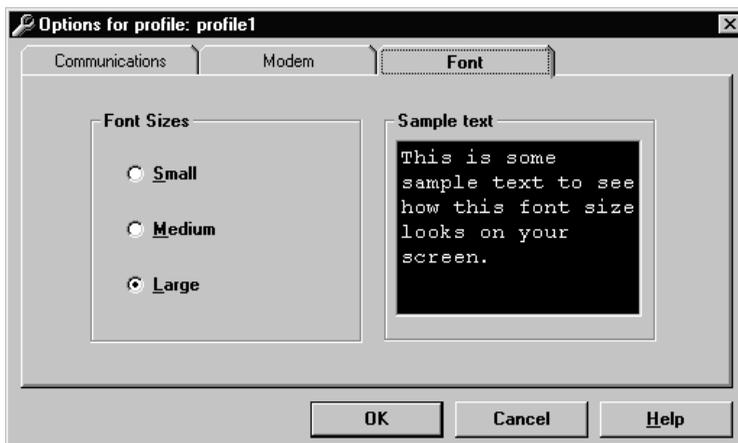
In the Font Sizes area, select one of the following:

- **Small.** This font is approximately 8 points. It is appropriate for video displays that have a resolution of 640 x 480 (VGA) or less.

- **Medium.** This font is approximately 9 points. It is appropriate for video displays that have a resolution of 800 x 600 or 1024 x 768. Medium is the default font size.

- **Large.** This font is approximately 10 points. It is appropriate for video displays that have a resolution of 1024 x 768 or greater.

- The **Sample text** box shows what the selected font size looks like.

CentreVu Terminal Emulator messages

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

- "Error messages" on page 8-24
- "Information messages" on page 8-25

Error messages

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

Unable to connect to the remote host.

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

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

The connection to the remote host was lost.

Some possible causes for this message are:

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

The profile name does not exist.

The system displays this message if you try to open a profile with the specified name and it does not exist.

Information messages

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

The profile name exists, replace?

The system displays this message if you try to save a profile with the specified name and it already exists.

Save changes to name?

The system displays this message if you try to exit Terminal without saving changes to the profile with the specified name.

A connection is active, exit anyway?

The system displays this message if you try to exit Terminal while a connection is active.

CentreVu
Supervisor

Troubleshooting

Overview

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

If the information in this section does not help you to solve the problem, contact the Avaya National Customer Care Center on 1-800-242-2121. For support outside of the United States, contact your Avaya representative or distributor. Avaya also offers fee-based installation consultation.

If you receive any error messages in the course of a failed installation, record the messages to assist National Customer Care Center personnel in diagnosing the problem.

Troubleshooting tips

This section will help you with problems you may encounter when installing CentreVu Supervisor (Supervisor), logging in to Supervisor, or running Supervisor. It contains tables that describe the error messages that may be displayed in Supervisor.

Installation error messages

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

- Information. Indicates that the error will not affect the success of the installation. Also indicates that you do not have privileges to perform the installation.

- Warning. Indicates that the error may affect the success of the installation.

- Severe. Indicates that the installation will fail, and that Setup will exit.

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

Error message	Corrective action	Type
Perform Rollback? This installation did not complete. Would you like to rollback the changes that were made during the partial installation?	Select **Yes** to delete files that were installed or to reinstate files in the registry that were changed during the partial installation.	SEVERE
Setup has determined that CentreVu Supervisor 9.0 was previously unsuccessfully attempted to be installed on this computer. Since the PC configuration was changed, Setup will attempt to restore the PC to its original configuration (cleanup) before continuing with Setup.	Select **Next** to continue with the installation. It is important that the PC is restored to its original configuration, or Supervisor may not install or run correctly.	SEVERE
The drive selected either does not exist or has insufficient space available. Enter a different destination drive.	Select another drive.	WARNING
You do not have administrative privileges. Please log on as administrator and install Centre Vu Supervisor 9.0.	Contact your system administrator, or select a PC on which you have administrative privileges.	INFORMA TION

Login error messages

Use the following information to help you with problems you may encounter when logging in to the CentreVu Call Management System (CMS) server.

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

Error message	Corrective action
This version of CentreVu Supervisor is not compatible with the software on your CentreVu CMS server. Please upgrade your PC with the appropriate version of CentreVu Supervisor. Contact your CentreVu CMS system administrator.	Select a different server on which the CMS version that you selected is installed, or select a different CMS version (R3V6, R3V8, R3V9). Contact your CMS system administrator.
Could not find the file DALEAPP.EXE in the Avaya CentreVu Supervisor directory. Please re-install this file into the Avaya CentreVu Supervisor directory or contact technical support.	Reinstall Supervisor. If you cannot solve this problem yourself, contact the National Customer Care Center on 1-800-242-2121.
Could not initialize communications.	Try again. If you still have trouble after your second attempt, contact the National Customer Care Center on 1-800-242-2121.
Could not initialize DALEAPP.EXE. Please try to login again or contact technical support	1. Exit Microsoft Windows.[a] 2. Open Microsoft Windows. 3. Try to connect again. 4. If this does not work, reinstall Supervisor and try to connect. 5. If this does not work, contact the National Customer Care Center on 1-800-242-2121.
Could not initiate a socket connection.	The network is not installed properly. Use the Bravo Tool to help you isolate the network problem, or contact your system administrator.

Error message	Corrective action
Could not open the specified serial port. Please check communications settings, correct any problems, and try again.	In the Options window, check the settings under the **Communications** tab. Check to see if any other device is connected to the port and that you have the correct port assigned.
Could not resolve the hostname '<user-entered server name>'. Please check communications settings, correct any problems, and try again	The hostname was not recognized by the Domain Name Services (DNS). Try the IP address instead of the hostname. If this does not work, contact your system administrator.
The application could not be started because system memory is low. Please close some applications and try again.	Close any open applications and try again.
The application could not be started because the executable file is corrupt. Please reinstall CentreVu Supervisor or call Technical Support.	Remove Supervisor and reinstall it. If Supervisor still does not start, contact the National Customer Care Center on 1-800-242-2121.
The application could not be started because the executable was not found. Please reinstall CentreVu Supervisor or call Technical Support.	Reinstall Supervisor or contact the National Customer Care Center on 1-800-242-2121.
The application could not be started because the path to the executable was not found. Please reinstall Avaya CentreVu Supervisor or call Technical Support.	Reinstalling Supervisor or contact the National Customer Care Center on 1-800-242-2121.
The carrier detect signal was lost.	This is a modem-related problem. Try connecting again. If the problem persists, contact your system administrator.

Error message	Corrective action
The connection to the server has been lost, and CentreVu Supervisor must exit. Please try to connect again later.	This is a network-related problem. A nonrecoverable break in the network was received. Try to log in to the CMS server again. If the problem persists, contact your system administrator.
The connection to the server was lost.	This is a network-related problem. A nonrecoverable break in the network was received. Try to log in to the CMS server again. If the problem persists, contact your system administrator.
The file AOS.EXE is corrupt, so CentreVu Supervisor must exit. Please re-install this file into the Avaya CentreVu Supervisor directory or contact technical support.	Reinstall Supervisor. During the installation, make sure you do not skip icon installation. Or, contact the National Customer Care Center on 1-800-242-2121.
The file AOS.EXE is not in your Avaya CentreVu Supervisor directory, so CentreVu Supervisor must exit. Please reinstall CentreVu Supervisor.	Reinstall Supervisor.
The file WINSOCK.DLL could not be found. Please ensure that this file is on your workstation's path.	Check for proper installation of the network. Contact your system administrator for help.

Error message	Corrective action
The maximum number of CentreVu Supervisor logins on the server has been reached. Please try again later.	The number of users that have been authorized to use Supervisor has been met. You will be denied login until the number of users fall below the authorized number. If you continue to have this problem, you can order more user licenses from the National Customer Care Center on 1-800-242-2121
The network connection to '<user-entered server name>' timed out.	Supervisor was unable to log in to the server. This error indicates that there may be a problem on the server. Contact your CMS Administrator.
The network connection was broken.	There is possibly a problem with the network. Contact your system administrator.
The passwords you entered do not match. Please retype the passwords and try again.	Check to see if the Caps Lock key is on. If it is, turn it off. Then, retype the password and try again.
The serial connection was broken.	Try to log in to the CMS server again. If the problem persists, contact your system administrator.
The server did not recognize your Login ID and/or Password. Please try again.	Make sure that you entered the correct login ID and password. If you did, make sure that the Caps Lock key is not on.
The server did not respond to the login request. Try again?	This type of error occurs when the network is busy. Try again. If the problem persists, contact your system administrator.

Error message	Corrective action
The server does not support this version of CentreVu Supervisor. Please contact your system administrator.	There is an incompatibility problem between the server and Supervisor. Upgrade the CMS server or install an older version of Supervisor.
The server is currently in single-user mode. Please try again later.	You are logging in to the CMS server when it is in single-user mode. Try again later.
The server is not set up to support CentreVu Supervisor. Please contact your system administrator.	Supervisor is not authorized on the server (either the number of Supervisor users = 0 or the feature is not authorized). Contact your system administrator.
The server refused the connection.	In the Options window, check the **Network Port** number.
There was an unknown failure on the server.	Contact your CMS Administrator.
This version of CentreVu Supervisor is not supported by the server. Please contact your system administrator.	There is an incompatibility problem between the server and Supervisor. Upgrade the CMS server or install an older version of Supervisor.
You are not recognized as a valid server user. Please contact your system administrator.	Your login ID is not administered on the CMS server. Contact your system administrator.
Your new password must differ from the old by at least three character positions.	Choose another password. It must have at least three different character positions than your old password. It also must have at least two alphabetic characters, at least one numeric or special character, and must be six characters in length.

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

a. Microsoft Windows is a trademark of Microsoft Corp.

OCX and DLL incompatibilities

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

1. Perform one of the following actions:

   - Remove everything from your StartUp group

   - Hold down the **Shift** key and press the **L** key while starting.

2. Restart Microsoft Windows.

3. Run Supervisor. Make sure that Supervisor is the only application that is running.

   ### $\Longrightarrow$ NOTE:

   If the problem went away, it means that other software loaded on your PC is using a OCX or DLL that is not compatible with Supervisor.

4. Start running the software that was in the StartUp group.

If you still encounter problems, then you will not be able to run this software at the same time as you run Supervisor. If you have further questions, contact the Avaya National Customer Care Center on 1-800-242-2121. For support outside of the United States, contact your Avaya representative or distributor.

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

Microsoft Windows swap files

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

Installing CentreVu Supervisor

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

Preserving CentreVu Supervisor user profiles

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

1. In the Microsoft Windows Explorer, locate the Avaya\CentreVu Supervisor folder (generally under Program Files).

2. Open the folder and copy the Profiles file tree to another location.

3. Reinstall or upgrade Supervisor.

4. Copy the saved profiles to the Profiles tree in the new Supervisor installation.

Resolving TCP/IP host name

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

1. To ensure that this is the problem, open an MS-DOS prompt or command prompt in Microsoft Windows.

2. Ping the CMS host.

   If the host cannot be found, contact your network administrator. If the host is found, the reply will contain the host's IP address.

3. Check that the CMS host entry on the Domain Name Server (DNS) is correct. If it is wrong or missing, use the IP address returned to you to correct or create the entry.

4. Edit the **LMHOSTS** file on the user PC to include a line for the CMS server, which is:

   server name <tab> *IP address*

Proper operation of networking software

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

Problems with serial/modem connections

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

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

1. Make sure that the RTS/CTS flow control string is selected in the Options window.

2. Check to see if your serial connection to the CMS server or modem is wired correctly for hardware flow control. For modem connections, make sure you have the correct cable wiring between the modem and the CMS server.

3. Your hardware flow control on the CMS server's serial ports must be on and functioning properly. Refer to the your SPARCserver documentation for correct configuration of hardware flow control for your respective serial communications.

4. 16550A UARTS must be in use on the PC running Supervisor. The following parameters in the [386Enh] section of the PC's **SYSTEM.INI** file should be set to:

   COM*n*FIFO=1

   Where *n* is the communications port being used. This will ensure that the FIFO buffer capability of the communications port will be used.

5. Some terminal server connections may require the addition of EscAllCtrl=1 in the [LINK] section of the **Centrevu.ini** file.

Using a secondary system password on the CMS server

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

For example:

[CONTROL]

SystemPasswordPrompt=<u>External security:</u>

CentreVu
Supervisor

Saving as HTML

Overview

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

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

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

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

- Save as HTML does not automatically update the HTML for real-time reports.

---

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

- Save as HTML is found in the pull-down report menu on an open report.

- Save as HTML does not support 32-bit color mode for graphics saved using Save as HTML.

Using Save as HTML

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

1. While running the report you want to save, select **Save as <u>H</u>TML** from the **<u>R</u>eport** menu, as shown below:

The system displays the Save as HTML window:

2. In the Template section of the Save as HTML window, do one of the following:

   - If you want to use a template, type the template file name in the template field, select the template from the drop-down history lists, or select the browse button and browse for a template.

   - If you do not want to use a template, select the **Do not use a template** radio button.

3. In the Output section, select one of the following:

   - Select **Use CentreVu Supervisor fonts** to preserve the report fonts as you see them in Supervisor.

   - Select **Use Web Browser default fonts to** display the output file using Internet browser default fonts.

4. To specify the name of the HTML output file to be created, do one of the following:

   - Type the name of the output file in the file name field.

   - Select the file name from the pull-down history list.

   - Select the browse button and browse for a file name.

5. You can now do either of the following:

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

    ### ⇒ NOTE:

    For more information on the Scripting feature, see *CentreVu® CMS R3V9
    Administration*, 585-214-015.

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

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

Output files

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

If there are charts associated with the file, they are converted into .gif files and
numbered in the order created. For example, **c:\temp\myrpt1.gif** and
c:\temp\myrpt2.gif.

The output file is created using the templates and fonts you have specified.
After the HTML is saved, you can move or copy it and all associated graphics
files to a Web server directory for viewing on the Internet or an Intranet.

Using templates

Templates are HTML files that can be created or edited using an HTML or text editor. A template can be used to provide company logos, background color, specific fonts, or surrounding text to the HTML file. The templates are limited by what your Web browser supports. Templates are installed with Save as HTML.

⇒ NOTE:

If you do not select a template, the HTML file displays only the report.

Not using templates

If you choose not to use existing templates, Save as HTML does the following:

- Generates standard surround tags <HTML> and <BODY> in order for your report to be converted to HTML

- Sets the background color white and font color to black

- Gives the page the same title as the report title.

Using existing templates

Supervisor provides you with templates to use when saving a report as an HTML file. Sample templates can be found in the samples directory of the Supervisor directory where the executable files were installed.

Save as HTML template tags

The following table describes the tags used by Save as HTML and which can be used to create templates.

HTML tag	Description
<CVSUP_TITLE>	This tag is replaced with the title of report in the HTML file. If this tag is used within the <TITLE> tags, the title of the report will be used as heading to the page. Multiple uses of this tag are allowed.
<CVSUP_BODY>	This tag is replaced by the report body in the HTML file. However, only the first occurrence of this tag is replaced. If a template is used and the <CVSUP_BODY> tag is not in the template, an error occurs, and the Save as HTML operation is aborted.

Fonts

If you choose to use the Supervisor fonts, the font face and size are preserved in the HTML file, as follows:

- The fonts used in Supervisor are Arial, Courier New and Times New Roman.

- In the event these fonts are not available on the computer viewing the HTML file, backup fonts are used. The backup fonts are Helvetica for Arial, Courier for Courier New, and Times for Times New Roman.

- If you choose to use the Web browser's default fonts, the HTML file will not specify any fonts, as follows:

  — If you choose not to preserve the Supervisor fonts, the appearance of the report in the HTML file may change.

  — If you choose to use a template, do not preserve the Supervisor fonts if the template specifies the fonts.

*CentreVu
Supervisor*

Glossary

ACD	See *Automatic Call Distribution*.
Actions Menu	A menu in the upper-left corner of the Supervisor Operations windows. The menu lists the actions available for that particular user window (for example, add, modify, and delete). You select an action after entering the necessary data in the user window.
Add	A Supervisor action that adds the data entered in the given window to the CMS database.
Add/Remove Programs Wizard	A Microsoft Windows feature that guides you through a series of steps in order to remove programs that have been installed on your computer. The Add/Remove icon is found in the Control Panel dialog box.

Administrator Privileges	Permissions assigned to a Centrevu Supervisor user in order to administer specific elements, such as installing CentreVu Supervisor on a network. Access permissions are specified as read or write permission. **Read** permission means the user can access and view only Supervisor data. **Write** permission means the Supervisor user can add, modify, or delete Supervisor data.
Agent	A person who answers calls to an extension in an ACD split/skill. The agent is known to CMS by a login identification keyed into a voice terminal.
Agent Reports	A group of reports that give the status of agents in an agent group, selected splits or skills, or real-time information and statistics.
Agent Skill	An attribute that is associated with an ACD agent. Agent Skills can be thought of as the ability for an agent with a particular set of skills to handle a call that requires one of a set of skills. An agent can be assigned up to four skills.
Application Folder	A folder on the network server that holds CentreVu Supervisor application software—executables and components.

Automatic Call Distribution (ACD)	A switch feature using software that channels high-volume incoming and outgoing call traffic to agent groups (splits or skills). Also an agent state where the extension is engaged on an ACD call.
Automatic Script	A Supervisor feature that launches a new Supervisor session that logs into CMS and runs the requested tasks in the background. Actions do not display on the PC. See also *Interactive Script* and *Script*.
AutoPlay	A Microsoft Windows feature that causes an application on a CD-ROM to run without any user interaction as soon as the CD-ROM is inserted into the drive.
Call Management System (CMS)	A software product used by business customers that have AT&T telecommunications switches and receive a large volume of telephone calls that are processed through the Automatic Call Distribution (ACD) feature of the switch. The CMS collects call-traffic data, formats management reports, and provides an administrative interface to the ACD feature in the switch.
CentreVu Advocate	A collection of ECS features that provide new flexibility in the way a call is selected for an agent in a call surplus situation and in the way that an agent is selected for a call.
Client	A single PC that uses CentreVu Supervisor.

CMS	See *Call Management System*.
Controller	A Supervisor feature that allows the user to access CMS reports and operations. The Controller includes a toolbar, a menu bar, a status bar, tooltips, and indicators/
Custom Reports	Real-time or historical reports that have been customized from standard reports or created from scratch.
Database	A group of tables that store ACD data according to a specific time frame: current and previous intrahour real-time data and intrahour, daily, weekly, and monthly historical data.
Database Item	A name for a specific type of data stored in one of the CMS databases. A database item may store ACD identifiers (split numbers or names, login IDs, VDNs, etc.) or statistical data on ACD performance (number of ACD calls, wait time for calls in queue, current states of individual agents, etc.).
Database Table	CMS uses these tables to collect, store, and retrieve ACD data. Standard CMS items (database items) are names of columns in the CMS database tables.
Data Points	Points of historical data. A data point should include data for each interval of the working day.
Delete	A Supervisor action that removes the entry on the window from the CMS database.

Designer Reports	Customized reports that can be created using CentreVu Supervisor's Report Designer feature, and which are run from CentreVu Supervisor.
Dialog Box	A small on-screen window that conveys or requests information from the user. This window can contain list boxes, text boxes, tabbed pages, and so forth.
Dictionary	A CMS subsystem that can be used to assign names to various call center elements such as login IDs, splits/skills, trunk groups, VDNs and vectors. These names appear on reports, making them easier to interpret.
Edit Menu	A menu on the Supervisor Operations windows. The menu lists the actions available for that particular user window (for example, cut, copy, and paste).
Exception	A type of activity on the ACD which falls outside of the limits you have defined. An exceptional condition is defined in the CMS Exceptions subsystem, and usually indicates abnormal or unacceptable performance on the ACD (by agents, splits/skills, VDNs, vectors, trunks, or trunk groups).
Exceptions Reports	Display occurrences of unusual call-handling events.
Find One	A CMS action that searches the database for entries thatch the input value.

Graphics	A CMS reporting option that allows you to view some reports in bar graph format.
Grayed Out	When you do not have access to a menu or action list item, it will be grayed out (that is, dimmed or displayed in a different color from the rest of the menu or action list).
Historical Reports	Display past ACD data for various agent, split/skill, trunk, trunk group, vector, or VDN activities. A report summary of call data into daily, weekly or monthly totals
HTML	See *HyperText Markup Language.*
Hypertext	A linkage between related text. For example, if you select a word in a sentence, information about that word is retrieved if it exists, or the next occurrence of the word is found.
HyperText Markup Language	A standard for defining documents with hypertext links. See also *Hypertext*.
Input Field	An area on window where you specify information that you would like to view, add, modify, or delete.
Installation Folder	A folder on the network that holds all of the CentreVu Supervisor files. Setup.exe is run from this folder to install Supervisor on each client computer.

Integrated Reports	Integrated reports compile call center information from any starting point in the last 24 hours up to and including the current interval.
Interactive Script	A Supervisor feature that runs the requested tasks in the current Supervisor session and displays the actions on the PC. You can input requested information while the script is running. See also *Automatic Script* and *Script*.
Jump	In Help, a command that moves you from the currently displayed topic to another topic.
LAN	See *Local Area Network*.
List All	A CMS action that lists all the entries that matched the current field values.
Local Area Network (LAN)	Two or more computers connected by cable and using a suitable operating system and application software so they can directly share hard disks, printers, and other peripherals, and files.
Local Installation	With this type of installation, you install all of the Supervisor software to disk space local to each computer from a CD-ROM or from the network.
Log	A file that contains a record of computer activity as well as backup and recovery data.

Maintenance	A CMS subsystem that is used for doing routine maintenance of the CentreVu CMS, such as backing up data, checking on the status of the connection to the switch, and scanning the error log.
Name Fields	Fields in which you may enter a name (synonym) that has been entered in the Dictionary subsystem (for example, names of agents, splits/skills, agent groups, trunk groups, vectors, VDNs).
Network Server	A computer in a network shared by multiple users.
Pop-up	A small window containing information that displays over a Help window.
Queue/Agent Reports	A group of reports that give the status of all top agents in a skill and queue status, or skill status for a selected skill.
Readme File	A file that provides up-to-the-minute information on a newly released product; in this case, CentreVu Supervisor.
Read-Only	A folder or file that can be read, but not updated or erased.

Real-Time Reports	Display current ACD call activity on agents, splits/skills, trunks, trunk groups, vectors, and VDNs for the current or previous intrahour interval. Current intrahour interval real-time reports are constantly updated as data changes during the interval. Previous intrahour interval real-time reports show data totals for activity that occurred in the previous intrahour interval.
Registry	The system-wide depository of information supported by Microsoft Windows. The registry contains information about the system and its applications, including clients and servers.
Report Designer	A CentreVu Supervisor feature that enables users to design their own reports.
Report Wizard	A CentreVu Supervisor feature that delivers user assistance, by way of a wizard, to quickly and easily generate new customized reports. The wizard provides instructional help that guides the user through a series of tasks that create a new customized report. Report Wizard is a supplement to Report Designer.
Run	A Microsoft Windows command that lets you execute a program, such as Supervisor installation.

Scripting

A CMS feature lets you automate actions such as changing an agent's skills, running reports, exporting report data, and many other CMS functions. For example, you can create a script to run a specified report and export the data on schedule.

Scroll

To use the bar on the side of the report window to move forward, backward, up, or down within a window.

Setup Program

A program that configures a system for a particular environment; for example, it informs the system of a new device or interface, such as CentreVu Framework.

Shared Installation

With this type of installation, the CentreVu Supervisor application software is installed to a shared application folder on the network server, but user-specific files and logs are stored in a Supervisor folder on each user's PC or on their own network drive.

Shortcut

An icon on your computer screen that enables you to select and run an application (for example, CentreVu Supervisor) quickly and easily.

Skill

An attribute that is assigned to an ACD Agent. Agent Skills can be thought of as the ability for an Agent with a particular set of skills to handle a call which requires one of those skills.

Solaris System	A multi-user operating system developed by sun Microsystems. The operating system on which CMS runs.
Split	A group of extensions that receives special-purpose calls in an efficient, cost-effective manner. Normally, calls to a split arrive primarily over one or a few trunk groups.
Standard Reports	The set of reports that are delivered with the CMS or CentreVu Supervisor software.
Start Menu	The menu that appears when you click on the Start button in the Microsoft Windows taskbar. This menu contains programs and other Microsoft Windows applications.
Taskbar	The bar that appears by default at the bottom of the Microsoft Windows desktop. You can click buttons that appear on this bar to switch between running programs.
Terminal	A combination of monitor (video display) and keyboard used to communicate with a remote computer to type and display information.
Terminal Emulator	A Supervisor software application that emulates a 615 Color (615C) terminal.
Toolbar	A row of Controller buttons used to activate various functions of the Supervisor application.

Tooltips	Brief descriptions that display when the mouse pointer is over a toolbar button.
Trunk Group Report	Displays the status of each trunk in a selected trunk group.
UNIX System	A multi-user operating system developed by AT&T in 1969. The operating system on the computer on which CMS runs.
User ID	The login ID for a CMS user.
VDN	See *Vector Directory Numbe*r.
VDN Reports	A group of reports that show profiles of current VDN performance, call handling information for a specific VDN based on skill preference, and how calls to specific VDNs have been handled.
Vector	A list of steps that process calls in a user-defined manner. The steps in a vector can send calls to splits, play announcements and music, disconnect calls, give calls a busy signal, or route calls to other destinations.

Vector Directory Number (VDN)	An extension number that enables calls to connect to a vector for processing. A VDN is not assigned an equipment location. It is assigned to a vector. A VDN can connect calls to a vector when the calls arrive over an assigned automatic-in trunk group or when calls arrive over a dial-repeating (DID) trunk group and the final digits match the VDN.
Vector Report	A report that lists the number of calls to specific vectors.
Window	A rectangular, on-screen frame through which you can view a menu, data entry fields, reports, or messages.

Index

CentreVu Supervisor

V

Value, data point label, 7-38
VDN icon, 7-40
VDN Thresholds, 7-71
Vector icon, 7-40
Viewing Distance, 7-31
Visible check box, 7-35, 7-36

W

Warning Icon, 5-37
Warning Threshold icons, 7-41
Width to Height, 7-31
Windows
    Closing, 5-48
    Deleting items, 6-16
    Input definitions, 5-41
    maximizing, 7-51
    minimizing, 7-51
    Resize, 7-51
    Resizing, 7-51
Windows Swap Files, 9-11

How Are We Doing?

Document Title: CentreVu**®** **Supervisor Version 9**
Installation and Getting Started
Document No.: 585-210-928 Issue 2 Date: April 2001

Avaya, Inc. welcomes your feedback on this document. Your comments can be of great value in helping us to improve our documentation.

1. Please rate the effectiveness of this document in the following areas:

	Excellent	Good	Fair	Poor	Not Applicable
Ease of Use					/////////////////////
Clarity					/////////////////////
Completeness					/////////////////////
Accuracy					/////////////////////
Organization					/////////////////////
Appearance					/////////////////////
Examples					/////////////////////
Illustration					/////////////////////
Overall Satisfaction					/////////////////////

2. Please check the ways you feel we could improve this document:

❑ Improve the overview/introduction
❑ Improve the table of contents
❑ Improve the organization
❑ Include more figures
❑ Add more examples
❑ Add more detail

❑ Make it more concise/brief
❑ Add more step-by-step procedures/tutorials
❑ Add more troubleshooting information
❑ Make it less technical
❑ Add more/better quick reference aids
❑ Improve the index

Please provide details for the suggested improvement. _____
_____

3.What did you like most about this document?
_____
_____

4.Feel free to write any comments below or on an attached sheet.
_____
_____
_____
_____

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 the form to 303-538-1741.