



CentreVu[®] IP Agent
Version 2

Installation and User Guide

585-215-713
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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.

Preventing Toll Fraud

"Toll fraud" is the unauthorized use of your telecommunications system by an unauthorized party (for example, a person who is not a corporate employee, agent, subcontractor, or working on your company's behalf). Be aware that there may be a risk of toll fraud associated with your system and that, if toll fraud occurs, it can result in substantial additional charges for your telecommunications services.

Avaya Fraud Intervention

If you *suspect that you are being victimized* by toll fraud and you need technical assistance or support, call Technical Service Center Toll Fraud Intervention Hotline at +1 800 643 2353 for the United States and Canada. For additional support telephone numbers, see the Avaya Web site:

<http://www.avaya.com>

Select **Support**, then select **Escalation Lists US and International**. This Web site includes telephone numbers for escalation within the United States. For escalation telephone numbers outside the United States, select **Global Escalation List**.

Providing Telecommunications Security

Telecommunications security (of voice, data, and/or video communications) is the prevention of any type of intrusion to (that is, either unauthorized or malicious access to or use of) your company's telecommunications equipment by some party.

Your company's "telecommunications equipment" includes both this Avaya product and any other voice/data/video equipment that could be accessed via this Avaya product (that is, "networked equipment").

An "outside party" is anyone who is not a corporate employee, agent, subcontractor, or working on your company's behalf. Whereas, a "malicious party" is anyone (including someone who may be otherwise authorized) who accesses your telecommunications equipment with either malicious or mischievous intent.

Such intrusions may be either to/through synchronous (time-multiplexed and/or circuit-based) or asynchronous (character-, message-, or packet-based) equipment or interfaces for reasons of:

- Utilization (of capabilities special to the accessed equipment)
- Theft (such as, of intellectual property, financial assets, or toll-facility access)
- Eavesdropping (privacy invasions to humans)
- Mischief (troubling, but apparently innocuous, tampering)
- Harm (such as harmful tampering, data loss or alteration, regardless of motive or intent)

Be aware that there may be a risk of unauthorized intrusions associated with your system and/or its networked equipment. Also realize that, if such an intrusion should occur, it could result in a variety of losses to your company (including but not limited to, human/data privacy, intellectual property, material assets, financial resources, labor costs, and/or legal costs).

Your Responsibility for Your Company's Telecommunications Security

The final responsibility for securing both this system and its networked equipment rests with you - an Avaya customer's system administrator, your telecommunications peers, and your managers. Base the fulfillment of your responsibility on acquired knowledge and resources from a variety of sources including but not limited to:

- Installation documents
- System administration documents
- Security documents
- Hardware-/software-based security tools
- Shared information between you and your peers
- Telecommunications security experts

To prevent intrusions to your telecommunications equipment, you and your peers should carefully program and configure:

- your Avaya-provided telecommunications systems and their interfaces
- your Avaya-provided software applications, as well as their underlying hardware/software platforms and interfaces
- any other equipment networked to your Avaya products.

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Avaya Support

Avaya provides a telephone number for you to use to report problems or to ask questions about your contact center. The support telephone number is 1-800-242-2121 in the United States. For additional support telephone numbers, see the Avaya Web site:

<http://www.avaya.com>

Select **Support**, then select **Escalation Lists US and International**.

This Web site includes telephone numbers for escalation within the United States. For escalation telephone numbers outside the United States, select **Global Escalation List**.

Acknowledgment

This document was written by the CRM Information Development group.

CentreVu® IP Agent
Release 1.2
Installation and User Guide

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Chapter 1: About this information product

Purpose

The *CentreVu*[®] IP Agent, Version 2 Installation and User Guide includes information that you need to know in order to install and use *CentreVu*[®] IP Agent, Version 2. It also provides information on features, basic operation, and administrative tasks.

This is issue 1.2 of this document.

Intended audience

This guide is intended for anyone who is installing and/or using the *CentreVu*[®] IP Agent, Version 2 software and performing station administration on the *DEFINITY*[®] ECS (Enterprise Communications Server). It assumes that you are familiar with:

- The computer on which *CentreVu*[®] IP Agent, Version 2 will be installed and run.
- Microsoft *Windows*[®] 95, Microsoft *Windows*[®] 98, Microsoft *Windows*[®] Millennium Edition, Microsoft *Windows*[®] 2000, Microsoft *Windows NT*[®] 4.0 , or Microsoft *Windows*[®] XP operating systems
- standard Microsoft *Windows*[®] conventions
- Call center configurations and operations

Conventions used

The following conventions are used in this document:

<i>Convention</i>	<i>Description</i>
Initial Capital Letters	Names of windows, dialog boxes, and keyboard keys. For example, The Name field is in the Properties dialog box.
<KEY>+<KEY>	Key combinations for which you must press and hold down one key and then press another key at the same time. For example, <Ctrl>+<F4> means that you press the Ctrl key and the F4 key at the same time.
Italic Text	Indicates references to other documents, products, trademarks, and also used for emphasis.
“ ”	Sections and chapters that are referenced. For example, See “Chapter 2, Installing and uninstalling <i>CentreVu</i> [®] IP Agent, Version 2”, for information on how to install the software.

Related documents

The following list provides the documents that can help you in the configuration and use of *CentreVu*[®] IP Agent, Version 2.

- *DEFINITY*[®] Enterprise Communications Administrator's Guide
- *DEFINITY*[®] Enterprise Communications Server Automatic Call Distribution (ACD) Supervisor Instructions
- *DEFINITY*[®] Enterprise Communications Server Automatic Call Distribution (ACD) Agent Instructions

To register for instructor-led courses, call

1-800-255-8988

To order CD-ROM courses, call

1-800-225-7585

Inquiries for training originating outside the United States and Canada should call

(1) (904) 636-3261

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About this information product

Chapter 2: Introduction

This chapter provides introductory and basic information about *CentreVu*[®] IP Agent, Version 2.

This chapter includes the following sections:

- [What is CentreVu IP Agent?](#) on page 16
- [CentreVu IP Agent configurations](#) on page 18
- [Compatible phone types for CentreVu IP Agent V2](#) on page 21
- [Other considerations](#) on page 22

What is CentreVu IP Agent?

Description

CentreVu[®] IP Agent is a software application that provides advanced telephony features for agents in a contact center. It also allows agents to work on-site at the contact center, off-site using Voice over Internet Protocol (VoIP), or off-site using analog connections over a Public Switched Telephone System (PSTN). The advanced telephony features are controlled by *CentreVu*[®] IP Agent through its direct communication with the *DEFINITY*[®] ECS.

Features

The following list provides the main features of *CentreVu*[®] IP Agent:

- Agents who are not located at the contact center can connect to the *DEFINITY*[®] ECS in the contact center and receive calls as if they were present at their contact center workstation. For example, if an agent cannot travel to the contact center because of transportation problems or weather conditions, they can still take calls by using *CentreVu*[®] IP Agent to connect to the *DEFINITY*[®] ECS.
- Agents using an analog telephone can still use the advanced call features provided by the *DEFINITY*[®] ECS. For example, an agent working from home can still use such features as call transfer, placing a call on hold, and changing their agent state through their own telephone.
- “Screen pops” can be initiated when a call is received or placed by the agent. *CentreVu*[®] IP Agent provides you with the ability to display webpages, start applications, or retrieve and display customer information from a database. A screen pop can consist of any process or application that can be initiated through one of the commands in the following list:
 - Windows[®] “Open” command
 - Dynamic Data Exchange (DDE) “execute” or “poke” commands
- A complete call history is provided for incoming and outgoing calls; even for those missed calls where the caller does not leave a voice message.
- A customizable telephone directory is provided that lists addresses, multiple telephone numbers, speed-dial numbers, e-mail, and notes for each contact.
- *CentreVu*[®] IP Agent provides the ability to search through public or company information using the Lightweight Directory Access Protocol (LDAP).
- *CentreVu*[®] IP Agent provides a compact, but instinctive, graphical user interface.

New features for CentreVu IP Agent, Version 2

The following list provides the new features for *CentreVu*[®] IP Agent, Version 2:

- *Road-Warrior configuration (Voice over IP)* — Agents can connect to the *DEFINITY*[®] ECS using their PC and an IP network connection. In this configuration, a telephone set is not necessary as all audio is performed through the sound card of the PC.
- *Agent greetings* — Multiple agent greetings can be recorded and configured to play based on such variables as login status, agent state, agent ID, prompted digits, Automatic Number Identification (ANI) or Vector Directory Number (VDN). This feature is only available for *CALLMASTER*[®] VI and Road-Warrior (VoIP) configurations.
- *Feature Deactivation* — Administrators can deactivate *CentreVu*[®] IP Agent features that should not be configured or used by agents. The features that can be deactivated include screen pops, screen pop administration, phone directory, public search directory, call history, phone features configuration, personal phone features, program options, and agent greeting selection.
- *Screen Pop Wizard* — This new wizard guides you through the creation of screen pops. This wizard makes configuring screen pops much more simple.
- *VDN screen pops* — Specific “screen pops” can be activated based on the VDN on which a call was received.
- *Speed dialer* — Telephone numbers can be entered and assigned to function keys (<F2>, <F3>, ..., <F8>).
- *VuStats support* — *CentreVu*[®] IP Agent can display multiple lines of VuStats information in the a dialog that helps provide complete monitoring of the contact center.
- *Clipboard dialing* — *CentreVu*[®] IP Agent can dial any number copied to the clipboard or a number that is highlighted in most applications on the PC.
- *Configurable database location* — You can now change the location where the *CentreVu*[®] IP Agent database is stored. This database contains the phone directory and the call history information.
- *Enhanced telephone features* — The telephone features now support the addition, renaming, and deletion of folders.
- *Enhanced system tray icon* — The “Answer” icon in the Microsoft *Windows*[®] system tray has been enhanced to provide release, drop, hold, transfer, and conference functions.
- *Drag and drop functions* — The transfer and conference functions can now be done by using drag-and-drop.
- *Automatic login* — An agent can now log in to the ACD automatically when *CentreVu*[®] IP Agent is started and uses the login information from the previous login.

CentreVu IP Agent configurations

Introduction

CentreVu[®] IP Agent, Version 2 supports three different configurations:

- [Road-Warrior configuration \(Voice over IP\)](#) on page 18
- [Telecommuter \(dual connection\)](#) on page 19
- [CALLMASTER VI \(DCP connection\)](#) on page 19

Road-Warrior configuration (Voice over IP)

This configuration is used in situations where a PC can make a dial-up or network connection to a *DEFINITY*[®] ECS. A telephone set is not used in this configuration which is valuable in those situations where a telephone set is not available or it is not cost-effective to have one available. All of the features of the *DEFINITY*[®] ECS are available to the agent through this type of connection. The single network connection between the PC running *CentreVu*[®] IP Agent and the *DEFINITY*[®] ECS carries two channels; one for signaling (data) and one for voice. *CentreVu*[®] IP Agent controls the data flow while the *DEFINITY*[®] iClarity IP Audio (an H.323 V2-compliant audio application) handles the voice communications. This type of configuration provides the best IP audio quality that is possible with your connection speeds and network setup. The agent places and receives calls through the *CentreVu*[®] IP Agent interface using a headset connected to the PC to speak and listen.

What you need to know

The following list provides the requirements and capabilities in this configuration:

- Connection — One dial-up or network connection from the PC with *CentreVu*[®] IP Agent to the *DEFINITY*[®] ECS
- PC hardware — Sound card (full-duplex recommended) and Modem or Network Interface Card for connectivity to the *DEFINITY*[®] ECS
- Telephone set — Not supported in this configuration
- Voice Quality — Dependent on the performance of the PC hardware and the amount of bandwidth available in the network connection
- Agent Greetings — Stored on the PC
- Right-To-Use *DEFINITY*[®] connections — Two station RTUs (One for the signaling path and one for the IP audio path)

Telecommuter (dual connection)

This configuration is used in situations where a PC can make a dial-up or network connection to a *DEFINITY*[®] ECS for the signaling (data) path and a voice path through a telephone set. The telephone set can be an analog telephone, a cellular telephone, or an extension on a local switch. Using this configuration provides toll-quality audio and full telephony functionality through *CentreVu*[®] IP Agent. Calls are placed and received through the *CentreVu*[®] IP Agent interface and the voice path is sent to the telephone. Agent greetings cannot be supported in this configuration because the greetings reside on the PC and cannot connect to the voice path.

What you need to know

The following list provides the requirements and capabilities in this configuration:

- Connection — One dial-up or network connection from the PC installed with *CentreVu*[®] IP Agent to the *DEFINITY*[®] ECS and a telephone capable of receiving calls through the *DEFINITY*[®] ECS
- PC hardware — Modem or Network Interface Card (NIC) for connection to the *DEFINITY*[®] ECS
- Telephone set — Any telephone capable of placing and receiving calls from the *DEFINITY*[®] ECS
- Voice Quality — High
- Agent Greetings — Not supported in this configuration
- Right-To-Use *DEFINITY*[®] connections — One station RTU for signaling connection and one of the following:
 - For off-site use, one port RTU
 - For on-site use, one station RTU

CALLMASTER VI (DCP connection)

The *CALLMASTER*[®] VI is a small telephone set with 8 buttons, 2 headset jacks, DCP connectivity, and is connected to a PC through a serial (RS-232) connection. This configuration is intended for usage at the desk of an agent in the contact center. Functionality is provided through a DCP connection to the *DEFINITY*[®] ECS and does not require a TCP/IP network connection.

What you need to know

The following list provides the requirements and capabilities in this configuration:

- Connection — DCP connection for the *CALLMASTER*[®] VI telephone set and a serial (RS-232) connection between the *CALLMASTER*[®] VI and the PC
- PC hardware — Serial (RS-232) port
- Telephone set — *CALLMASTER*[®] VI
- Voice Quality — High
- Agent Greetings — Stored on the *CALLMASTER*[®] VI telephone set
- Right-To-Use *DEFINITY*[®] connections — One station RTU

Compatible phone types for CentreVu IP Agent V2

Supported phone types

The following table lists the phone types that can be set on the *DEFINITY*[®] system and that Avaya supports for use with *CentreVu*[®] IP Agent, Version 2:

CALLMASTER II—602A1*	6416D+
CALLMASTER III— 603A1*, 603D1*, and 603E1*	6416D+ with expansion module
CALLMASTER IV—603F1*	6424D+
CALLMASTER V—607A1	6424D+ with expansion module
CALLMASTER VI—606A1*	8405D
4606	8405D+
4612	8410D
4624	8411D (For this telephone set, you must disable the data port, which is true for all softphones.)
6408D	8434D*
6408D+	8434D* with expansion module

* This phone type is capable of displaying 80 characters.

Recommended phone types

While all of the phone types listed in the previous table work with *CentreVu*[®] IP Agent, Version 2, the following phone types provide the most buttons, features, and the largest area of display:

- 606A1
- 8434D

Because of the larger number of characters used for display, these phone types are better suited to handle VuStats or Prompted Digits information.

Other considerations

Co-residence with *DEFINITY*[®] IP Softphone[™]

You can install *CentreVu*[®] IP Agent using an IP endpoint on a PC on which *DEFINITY*[®] IP Softphone R2 is installed. You can run either program, but you cannot run them at the same time. You cannot run *CentreVu*[®] IP Agent with an extension that is currently registered as an *DEFINITY*[®] IP Softphone endpoint on the same PC. If the extension is registered as a *DEFINITY*[®] IP Softphone endpoint, you must log out and exit the registration program before starting *CentreVu*[®] IP Agent.

You cannot install *CentreVu*[®] IP Agent using a *CALLMASTER*[®] VI endpoint on a PC that currently has *DEFINITY*[®] IP Softphone R2 installed.

Network compatibility

CentreVu[®] IP Agent does not support Network Address Translation (NAT), Port Address Translation (PAT), or unsupported Virtual Private Network (VPN).

Dialing emergency numbers

CentreVu[®] IP Agent can dial emergency calls such as 911 calls in the United States; however, the call will only reach the local emergency service in the Public Safety Answering Point area where the *DEFINITY*[®] ECS is located.

From locations outside the contact center, *CentreVu*[®] IP Agent will not dial to and connect with local emergency services. Therefore, you should not use *CentreVu*[®] IP Agent to dial emergency numbers when dialing from remote locations.

 **Important:**

Avaya will not be responsible or liable for any damages or injuries resulting from misplaced emergency calls made from *CentreVu*[®] IP Agent. Your use of this product indicates that you have read this advisory and agree to use an alternative telephone to dial all emergency calls from remote locations.

Chapter 3: Installing and uninstalling CentreVu IP Agent

This section contains the procedures and important information for installing and uninstalling *CentreVu*[®] IP Agent, Version 2.

This section includes the following topics:

- [Prerequisites](#) on page 25
- [Installing CentreVu IP Agent V2](#) on page 31
- [Upgrades and reinstallation](#) on page 39
- [Uninstalling CentreVu IP Agent V2](#) on page 43

CentreVu IP Agent software CD-ROM contents

The *CentreVu*[®] IP Agent, Version 2 CD-ROM contains the following:

- *CentreVu*[®] IP Agent, Version 2 installation program
- *CentreVu*[®] IP Agent, Version 2 program files
- Documentation in PDF format — Adobe *Acrobat*[®] Reader 3.0 or later is required to view PDF documents.
- A *readme.txt* file that contains last minute information

Prerequisites

This section provides information on the necessary hardware and software required for successful installation and use of *CentreVu*[®] IP Agent.

This list provides the minimum or recommended requirements for following areas:

- [DEFINITY system](#) on page 26
- [Personal computer hardware](#) on page 26
- [Personal computer software](#) on page 28
- [Voice-over-IP considerations](#) on page 28

Requirements

This section provides specific information regarding the minimum requirements for successful installation and use of *CentreVu*[®] IP Agent, Version 2.

DEFINITY system

CentreVu[®] IP Agent, Version 2 requires one of the following *DEFINITY*[®] ECS depending on the configuration used:

- Telecommuter configurations — A *DEFINITY*[®] Enterprise Communication Server (ECS) release 8.2 or later with the C-LAN circuit pack.
- Road-Warrior (VoIP) configurations — A *DEFINITY*[®] Enterprise Communications Server (ECS) release 8.2 or later with the C-LAN and IP Media Processor circuit packs.
- *CALLMASTER*[®] VI configurations — A *DEFINITY*[®] ECS with software release 6.2 or later

Personal computer hardware

The following list provides the minimum PC hardware requirements for *CentreVu*[®] IP Agent, Version 2:

Processor

An x86 processor at 200 MHz or faster is required. For Road-Warrior (VoIP) configurations, a minimum of a 300 MHz processor is required.

Hard disk space

CentreVu[®] IP Agent requires a minimum of 30 MB. *CentreVu*[®] IP Agent could require more hard disk space depending on the amount of data you store for the phone directory, call history, and screen pops.

RAM

Road-Warrior (VoIP) configurations:

- Microsoft *Windows*[®] XP, Microsoft *Windows*[®] 2000 — 128 MB
- Microsoft *Windows*[®] 98, Microsoft *Windows*[®] Millennium Edition, and Microsoft *Windows NT*[®] 4.0 — 64 MB

- Microsoft *Windows*[®] 95 — Unsupported

Telecommuter (dual-line) configurations:

- Microsoft *Windows*[®] XP, Microsoft *Windows*[®] 2000, and Microsoft *Windows NT*[®] 4.0 — 64 MB
- Microsoft *Windows*[®] 98 and Microsoft *Windows*[®] Millennium Edition — 32 MB
- Microsoft *Windows*[®] 95 — Unsupported

CALLMASTER[®] VI configurations:

- Microsoft *Windows*[®] XP, Microsoft *Windows*[®] 2000 and Microsoft *Windows NT*[®] 4.0 — 64 MB
- Microsoft *Windows*[®] 98 and Microsoft *Windows*[®] Millennium Edition — 32 MB
- Microsoft *Windows*[®] 95 — 32 MB

Audio

Road-Warrior (VoIP) configurations require a sound card and a headset or speakers/microphone. It is recommended that you use a sound card that supports full-duplex operation for maximum voice quality. Use of a headset will provide higher voice quality than that of speakers and a microphone.

For a list of the laptops, sound cards, and headsets supported by *CentreVu*[®] IP Agent, go to <http://support.avaya.com>.

Note:

Only the Road-Warrior configuration supports the use of a microphone through the PC.

Networking

The following list provides the network requirements for each configuration type:

- For Road-Warrior (VoIP) configurations, a single network connection between the PC and the *DEFINITY*[®] ECS is required.
- For Telecommuter configurations, one network connection and one telephone connection are required.
- For *CALLMASTER*[®] VI configurations, a Digital Communications Protocol (DCP) connection to the *DEFINITY*[®] ECS and a serial (RS-232) connection between the PC and the *CALLMASTER*[®] VI telephone set is required.

Peripherals

The following peripherals are required for installation and usage of *CentreVu*[®] IP Agent:

- CD-ROM drive for installation
- Mouse or compatible pointing device

Personal computer software

CentreVu[®] IP Agent, Version 2 requires the following software:

- A Microsoft *Windows*[™] operating system from the following list:
 - Windows 95 (Supports only the *CALLMASTER*[®] VI configuration)
 - Windows 98 Microsoft *Windows*[®] 98
 - Windows Millennium Edition (ME)
 - Windows NT 4.0 Workstation and Server with Service Pack 4 (SP4) or later
 - Windows 2000 Professional and Server
 - Windows XP Home and Professional
- Microsoft *Internet Explorer 4.0*[™] or later is required for viewing the online help for *CentreVu*[®] IP Agent.



Important:

Microsoft *Windows 2000 Advanced Server*[™] and *Windows 2000 Datacenter Server*[™] are not supported.

CentreVu[®] IP Agent does not support usage through Terminal Services on Windows 2000 Server or Windows NT Terminal Server.

Voice-over-IP considerations

Voice communication through Internet Protocol requires consistent, non-restrictive network bandwidth as well as the PC hardware sufficient to support not only the communications of the agent but also other tasks. If you experience problems with Avaya[™] IP Agent Voice-over-IP telephony, you should ensure that network and PC resources are adequate for the tasks being performed.

Voice-over-IP uses real-time processing on your PC to transmit voice communication. Nearly all other processes on a PC use sequential processing meaning that requests for system resources are processed as they become available. If resources are not available to process Voice-over-IP actions, the quality of the communication degrades.

Network bandwidth availability can also have an impact on Voice-over-IP communications. The codecs used for Voice-over-IP encoding can vary from using small packets for dial-up

connections with reduced voice quality to using larger packets providing higher voice quality over broadband and high-speed connections.

The PC software and hardware requirements for Avaya IP Agent are the absolute minimum needed for operation. If you experience problems with Voice-over-IP beyond those of configuration, most can be solved by upgrading system or using one with higher specifications.

Troubleshooting

The speed of a processor is a consideration when you are troubleshooting Voice-over-IP difficulties. However, architecture must also be considered. Both Intel® and AMD® have produced economical processors for small business and home users that, while rated at comparable speeds to the higher-priced models, have reduced on-chip memory (L1/L2 cache). This affects real-time processing which, in turn, affects Voice-over-IP communications. Additionally, some chip sets have been created which include specialized instruction sets that optimize specific types of applications and processes. These include speech processing.

If you are experiencing problems with Voice-over-IP communications with IP Agent, using a system with higher specifications for the items listed below is recommended.

- Processor speed
- On-chip memory (L1/L2 cache)
- System Bus speed

Note:

Avaya IP Agent does not officially support Cyrix™ processors.

Systems

The following system descriptions are meant as a guideline for determining if higher system requirements are necessary for Voice-over-IP communications. If your system more closely resembles the *moderate-* or *high-demand* systems, an upgrade is recommended.

Specific requirements for each type of system cannot be given because RAM, processor speed, system bus speed, on-chip memory, sound cards, network bandwidth, and applications in use are all variables that can range greatly in their impact.

High-demand – A high-demand system is a PC that uses processor-intensive applications.

The following list presents some examples of activities and applications that are used in a high-demand system:

- Multiple, CPU-intensive applications running simultaneously

Installing and uninstalling CentreVu IP Agent

- Database queries/hosting
- Multimedia applications
- Computer-Assisted Drafting (CAD) applications
- Compilers
- Streaming media

Moderate-demand – A moderate-demand system is a PC that sometimes uses applications normally found in an office environment.

The following list presents some examples of activities and applications that are used in a moderate-demand system:

- Word processors
- Spreadsheets
- Web browsing
- Data entry
- General e-mail

Low-demand – A low-demand system is a PC that rarely uses any applications apart from Avaya IP Agent.

The following list presents some examples of activities and applications that are used in a low-demand system:

- Text e-mail
- Simple web browsing (no streaming media)
- Minimal data entry

Installing CentreVu IP Agent V2

This section provides the procedure for installing *CentreVu*[®] IP Agent, Version 2 on a personal computer.

Performing the installation

Before you begin

Ensure that you have done the following before you attempt to install *CentreVu*[®] IP Agent, Version 2:

- Close all applications.
- Insert the *CentreVu*[®] IP Agent, Version 2 CD-ROM in the CD-ROM drive.
- Read the *readme.txt* file in the root directory of the *CentreVu*[®] IP Agent, Version 2 CD-ROM.

Distributed installation

If you wish to install *CentreVu*[®] IP Agent on PCs that are not equipped with a CD-ROM drive, you can copy the contents of the CD-ROM to a network location. Running the install program from the network does not alter the installation program.

Steps

To install *CentreVu*[®] IP Agent, Version 2, perform the following steps:

1. If the *CentreVu*[®] IP Agent, Version 2 installation program did not begin after the CD-ROM was inserted, execute the *SETUP.EXE* file in the root directory of the CD-ROM.

The system displays the **Welcome** window.

2. Select **Next >**.

The install program displays the **Software License Agreement** window.

3. Select **Yes** to accept all the terms of the Software License Agreement. Selecting **No** will cause the installation program to exit.

The install program displays the **Select Configuration** window.



4. Select one of the following options:

- **IP Endpoint** — This option is used for LAN and dial-up connections. This option is not supported on Microsoft *Windows*® 95.
- **CALLMASTER VI Endpoint** — This option is used for PCs connected through a serial connection to a *CALLMASTER*® VI terminal.

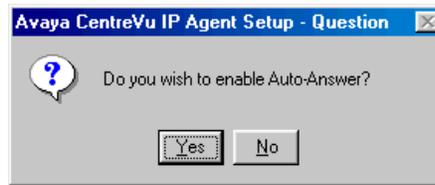
This option is only valid for those call centers using *CALLMASTER*® VI terminals and the 606A1 phone type on the *DEFINITY*® ECS which requires that the PASTE (PC Application Software Translation Exchange) customer option is enabled.

▲ Important:

If you are reinstalling *CentreVu*® IP Agent, Version 2, the Endpoint previously configured on the PC will be selected by default. To change Endpoint type, the currently installed *CentreVu*® IP Agent must be removed. The install program can remove the previous version of *CentreVu*® IP Agent. If you choose the type of Endpoint that is not currently used, the install program displays a message box asking if the current version should be removed. Selecting **Yes** will remove the current version and the installation continues.

Installing and uninstalling CentreVu IP Agent

5. If you selected **IP Endpoint** in the previous step, the install program displays a message box asking if you wish to have *CentreVu*[®] IP Agent set to Auto-Answer.



Select **Yes** to have *CentreVu*[®] IP Agent automatically connect the agent to incoming calls without requiring interaction with the telephone set or *CentreVu*[®] IP Agent.

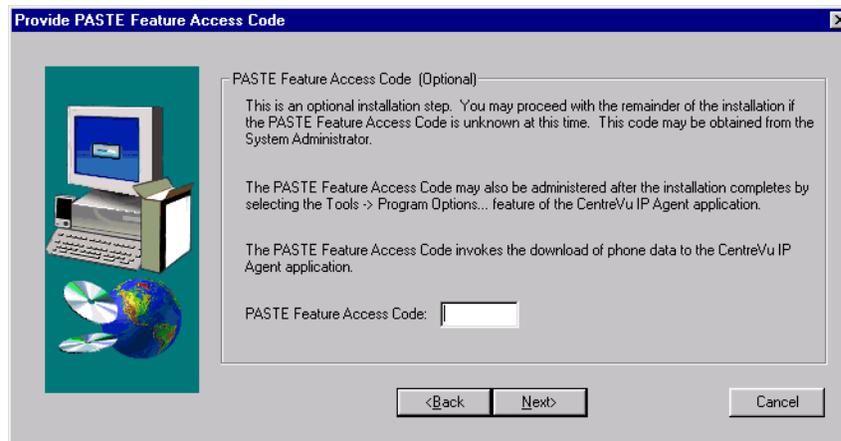
If you do not wish to have this option enabled, select **No**

The Auto-Answer feature requires that *DEFINITY*[®] ECS configuration for this station is also set for auto-answer. Failure to have this option set in both *CentreVu*[®] IP Agent and the *DEFINITY*[®] ECS can result in problems during agent login or when answering incoming calls.

6. Select **Next >**.

If you selected the **CALLMASTER VI Endpoint** configuration, the install program displays the **Provide PASTE Feature Access Code** window.

The PC Application Software Translation Exchange (PASTE) is a *DEFINITY*[®] ECS feature that uses the *CALLMASTER*[®] VI terminal to pass software translation information to *CentreVu*[®] IP Agent.



7. Enter the *PASTE Feature Access Code* in the provided field. If you do not know the *PASTE Feature Access Code* at the time of installation, leave this field blank. You can enter this code at a later time in **Program Options**.

You can find the *PASTE Feature Access Code* in the *Feature Access Code (FAC)* form on the *DEFINITY*[®] ECS. For more information on the *PASTE Feature Access Code*, see the *DEFINITY*[®] Enterprise Communications Server Administrator's Guide for your specific *DEFINITY*[®] ECS.

8. Select **Next >**.

The install program displays the **Choose Destination Location** window.

9. If you wish to install *CentreVu*[®] IP Agent, Version 2 in a folder other than the default, click the **Browse** button in the **Destination Folder** box.

10. When you are satisfied with the folder in which *CentreVu*[®] IP Agent, Version 2 will be installed, click **Next >**.

The install program displays the **Setup Type** window.

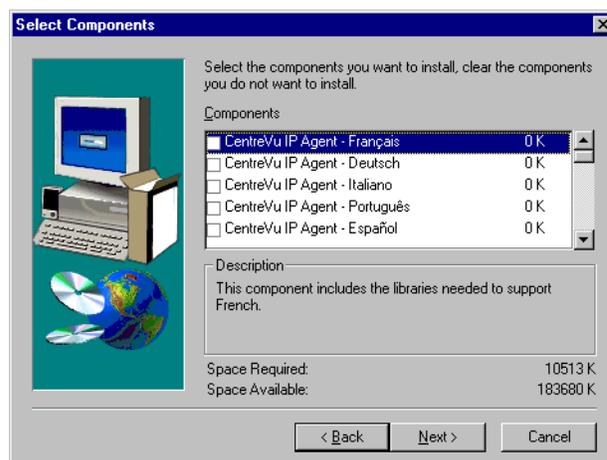
11. In the **Setup Type** window, select one of the following options and then click **Next >**:

- **Typical** — This option installs the basic options in English as well as the basic options in the language of your Microsoft *Windows*[®] operating system.
- **Custom** — This option installs the basic options in English as well as the basic options in any language you choose.

If you selected the **Custom** option, you will be presented with the **Select Components** window that allows you to specify the software components to install. Proceed with the next step.

If you selected the **Typical** option, go to Step 16.

12. Indicate the components to install by selecting the check box next to the option.



When selecting the components to install, ensure that the Space Required does not exceed the Space Available that is indicated at the bottom of the window.

13. Select **Next >**.

The install program displays the **Select Program Folder** window.

14. The **Select Program Folder** window allows you to choose one of the following methods to specify the folder name that will appear in the Start Menu:

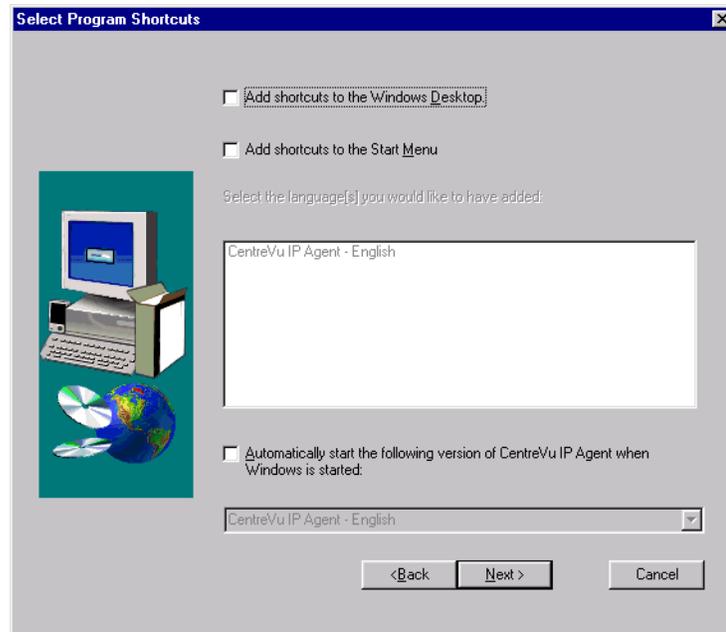
- You can accept the default *CentreVu*[®] IP Agent, Version 2 folder name that appears in the **Program Folders:** field.

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- You can enter a different folder name in the **Program Folders:** field.
- You can select an existing folder in the **Existing Folders:** field in which to install the *CentreVu*[®] IP Agent, Version 2 shortcuts.

15. Select **Next >**.

The install program displays the **Select Program Shortcuts** window.



16. Select the check box next to the shortcut options you wish to occur.

Note:

If you select a shortcut location but do not select any language, the install program displays a warning that you need to select at least one or more language.

17. If you selected one of the check boxes on this dialog, you must highlight a language in the **Select the languages you would like to have added** list box for the shortcuts to be created in that language.
18. If you would like *CentreVu*[®] IP Agent, Version 2 to run automatically when Microsoft *Windows*[®] is started, select the check box for **Automatically start the following version of CentreVu IP Agent when Windows is started:** and then select the language from the drop-down list.

! Important:

You must establish a connection to your corporate network before logging in to the *DEFINITY*[®] ECS with *CentreVu*[®] IP Agent. If you are using a dial-up modem with a dynamically-assigned IP address, do not select this option.

19. Select **Next >**.

The install program displays the **Start Copying Files** window.

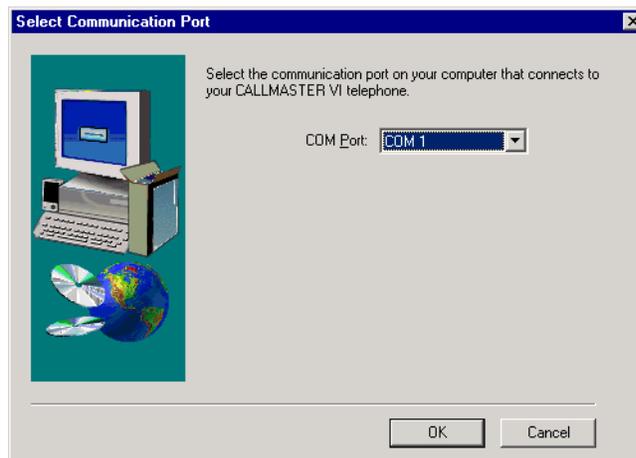
This window displays the options that you have selected. If you need to make any changes to the selections you made, select the **< Back** button until you reach the necessary window.

20. When you are satisfied with the specified options, select **Next >**.

The install program begins copying files. When this process is complete, the install program displays the **CentreVu IP Agent Completion Status** window which displays the progress of *CentreVu*[®] IP Agent, Version 2 installation and configuration.

Note:

If you are performing an installation for a *CALLMASTER*[®] VI, the install program displays the **Select Communication Port** window. If the installation type is IP Endpoint, this dialog is not displayed.



21. For *CALLMASTER*[®] VI installations, select the communications (COM) port that is used to connect to the *CALLMASTER*[®] VI. If you are performing an IP Endpoint installation, skip this step.

When the configuration of *CentreVu*[®] IP Agent, Version 2 is complete, the install program displays the **View the Release Information File** window.

22. Select the check box provided in the **View the Release Information File** window to view the release information for *CentreVu*[®] IP Agent, Version 2.

23. Select **Next >**.

The install program displays the *readme.txt* file.

24. When you have read the *readme.txt* file, close the application displaying it.

The install program displays the **Setup Complete** window.

25. In the **Setup Complete** window, select one of the following options:

Installing and uninstalling CentreVu IP Agent

- **Yes** — This option will automatically close all currently running applications and restart the computer.
- **No** — This option allows you to continue working without restarting your computer.



Important:

You must restart your computer before running *CentreVu*[®] IP Agent, Version 2.

26. Select **Finish**.

The install program completes and performs a restart of the computer if you selected that option.

Upgrades and reinstallation

This section provides information for when you install *CentreVu*[®] IP Agent, Version 2 over a previous version of *CentreVu*[®] IP Agent, such as V1 or V1.1.

This section contains the following topics:

- [Upgrading or CentreVu IP Agent V1.X to V2](#) on page 40
- [Reinstalling CentreVu IP Agent V2](#) on page 41

Upgrading or CentreVu IP Agent V1.X to V2

This section provides information when upgrading CentreVu IP Agent V1.X to *CentreVu*[®] IP Agent, Version 2.

The installation procedure for upgrading to *CentreVu*[®] IP Agent, Version 2 is the same as listed in the [Performing the installation](#) section except for the following:

- You cannot change the installation directory for *CentreVu*[®] IP Agent.

Data migration

The following list describes the areas of customizable data and how the upgrade process to *CentreVu*[®] IP Agent, Version 2 affects each one:

- *Call History* — The call history is completely migrated during an upgrade.
- *Phone Directory* — The phone directory is completely migrated during an upgrade.
- *Program Options* — The settings you have configured for previous versions are completely migrated during an upgrade.
- *Public Search Directory* — LDAP servers and the associated settings are completely migrated during an upgrade.
- *Screen Pops* — Screen pops cannot be migrated automatically during an upgrade. You must recreate your screen pops manually in *CentreVu*[®] IP Agent, Version 2. However, once you have recreated the screen pops on one PC, you can export this information using the **File > Export** option from the menu bar and then import it into the remaining *CentreVu*[®] IP Agent, Version 2 PCs.
- *Personalized Phone Labels* — If you changed the name of a feature listed in the **Phone Features** or **Personal Phone Features**, these names cannot be saved during an upgrade. You will need to rename these features in *CentreVu*[®] IP Agent, Version 2.
- *Personal Phone Features* — Any features copied to the **Personalized Phone Features** window are not saved during an upgrade. These entries must be manually copied to this window again.

Reinstalling CentreVu IP Agent V2

This section provides information for those times when you are reinstalling or upgrading to a later release of *CentreVu*[®] IP Agent, Version 2.

When you are reinstalling *CentreVu*[®] IP Agent, Version 2, the current endpoint configuration of the previous version is automatically selected during installation. Other than this difference, the installation procedure is the same as listed in the [Performing the installation](#) section.

Important:

During a reinstall, the install program prompts you to remove the current version of *CentreVu*[®] IP Agent, Version 2. If you cancel the installation and uninstall *CentreVu*[®] IP Agent manually, you will lose most of your current information, including call history, phone directory, and screen pops. To preserve your current *CentreVu*[®] IP Agent information, continue the installation when the first warning appears. Another prompt appears during installation which asks if the install program should automatically remove the previous version. Allowing the install program to remove the previous version preserves your data.

Data migration

The following list of information is migrated during a reinstall of *CentreVu*[®] IP Agent, Version 2:

- *Call History* — The call history is completely migrated during a reinstall.
- *Phone Directory* — The phone directory is completely migrated during a reinstall.
- *Program Options* — The settings you have configured for previous versions are completely migrated during a reinstall.
- *Public Search Directory* — LDAP servers and the associated settings are completely migrated during a reinstall.
- *Screen Pops* — Screen pops cannot be migrated automatically during a reinstall. You must recreate your screen pops manually in *CentreVu*[®] IP Agent, Version 2. However, once you have recreated the screen pops on one PC, you can export this information using the **File > Export** option from the menu bar and then import it into the remaining *CentreVu*[®] IP Agent, Version 2 PCs.
- *Personalized Phone Labels* — If you changed the name of a feature listed in the **Phone Features** or **Personal Phone Features**, these names cannot be saved during an upgrade. You will need to rename these features in *CentreVu*[®] IP Agent, Version 2.

Installing and uninstalling CentreVu IP Agent

- *Personal Phone Features* — Any features copied to the **Personalized Phone Features** window are not saved during an upgrade. These entries must be manually recreated and copied to this window again.
- *Custom Lists* — Folders and items within the folders that you have created for your **Phone Features** are not saved during an upgrade. These folders and items must be manually recreated.

Uninstalling CentreVu IP Agent V2

This section explains how to uninstall *CentreVu*[®] IP Agent, Version 2.

You can easily uninstall *CentreVu*[®] IP Agent, Version 2 using the Windows **Add/Remove Programs** wizard. The uninstall program removes the *CentreVu*[®] IP Agent, Version 2 files including all installed languages, the folders associated with *CentreVu*[®] IP Agent, Version 2, the *DEFINITY*[®] IP Service Provider, and the *DEFINITY*[®] iClarity IP Audio component from the computer. Read-only folders that are shared with other applications are not removed.

Performing the uninstall

Steps

To uninstall the *CentreVu*[®] IP Agent, Version 2 application, perform the following steps:

1. Close *CentreVu*[®] IP Agent, Version 2 if it is currently running.
2. From the **Control Panel**, double-click the **Add/Remove Programs** icon. Microsoft *Windows*[®] displays the **Add/Remove Programs Properties** dialog box.
3. On the **Install/Uninstall** tab, find and highlight **Avaya CentreVu IP Agent** in the list box.
4. Select the **Add/Remove...** button.

Microsoft *Windows*[®] displays the **Confirm File Deletion** message box.

5. Select **Yes**.

The `unInstallShieldwizard` begins and the **Remove Programs From Your Computer** dialog box appears. The uninstall program enters a check by each component after it is removed.

6. When the uninstall program encounters a shared file that is no longer shared by other programs, you are asked if the shared file should be removed. If you are unsure if a shared file is needed, it is recommended that you do not delete the shared file.

Select one of the following options:

- **Yes** — This option deletes the shared file
- **Yes To All** — This option deletes this and all other remaining shared files
- **No** — This option does not delete the shared file
- **No to All** — This option does not delete this or any other shared files

When the uninstall is complete, the message, “Uninstall successfully completed”, appears at the bottom of the **Remove Programs From Your Computer** dialog box.

7. Select **OK**.

Microsoft *Windows*[®] closes the **Remove Program From Your Computer** dialog box.

8. Select **OK**.

The uninstall program closes the message box.

The uninstall removes all files and directories that were created during the *CentreVu*[®] IP Agent installation.

Chapter 4: Administering DEFINITY for CentreVu IP Agent

This section provides procedures and information on how to configure a *DEFINITY*[®] Enterprise Communication Server (ECS) for use with *CentreVu*[®] IP Agent.

Before agents can receive calls with *CentreVu*[®] IP Agent, the *DEFINITY*[®] ECS must be configured to support such things as extension assignments, IP connectivity, and phone types.

Before you begin

You should be familiar with administering *DEFINITY*[®] ECS before attempting any of the procedures in this section.

Contents

This chapter includes the following sections:

- [Configuring the DEFINITY ECS](#) on page 47
- [Required DEFINITY circuit packs](#) on page 67

Configuring the DEFINITY ECS

This section provides the procedure on how to configure a *DEFINITY*[®] ECS for use with *CentreVu*[®] IP Agent.

This section contains the following topics:

- [Ensuring Telecommuter and Road-Warrior compatibility](#) on page 48
- [Ensuring CALLMASTER VI compatibility](#) on page 51
- [Validating Feature Access Codes](#) on page 52
- [Changing station settings for Telecommuter configurations](#) on page 54
- [Changing station settings for Road-Warrior configurations](#) on page 59
- [Changing station settings for CALLMASTER VI configurations](#) on page 64

The screenshots provided in this section are from a *DEFINITY*[®] ECS with the Expert Agent Selection (EAS) feature. You may notice some slight differences if your *DEFINITY*[®] does not have EAS. To accommodate for this, each step in the procedure requiring a distinction between an EAS and non-EAS system will be stated.

Ensuring Telecommuter and Road-Warrior compatibility

This section provides the procedure for ensuring that your *DEFINITY*[®] ECS is configured to support *CentreVu*[®] IP Agent in the Telecommuter and Road-Warrior (VoIP) configurations.

Before you begin

The settings for IP connections can only be enabled if your *DEFINITY*[®] ECS supports use of Internet Protocol (IP) for calls.

Screens presented in this section may differ in appearance from those on your *DEFINITY*[®] ECS. All options on the specified forms mentioned in this procedure are available, but may not be on the page noted.



Important:

If any settings of your *DEFINITY*[®] ECS do not conform with the steps in this procedure, you must contact Avaya to purchase the appropriate options or configuration before you can use *CentreVu*[®] IP Agent.

Steps

To ensure that your *DEFINITY*[®] ECS supports the Telecommuter and Road-Warrior configurations:

1. Log in to the Station Administration Terminal (SAT) on the *DEFINITY*[®] ECS.
2. Enter **display system-parameters customer-options**.

The SAT displays Page 1 of the system-parameters customer-options form.

```
display system-parameters customer-options Page 1 of 9
OPTIONAL FEATURES
G3 Version: W9 Maximum Ports: 8000
Location: 1 Maximum XMOBILE Stations: 0

IP PORT CAPACITIES
Maximum Administered IP Trunks: 100
Maximum Concurrently Registered IP Stations: 400
Maximum Administered Remote Office Trunks: 0
Maximum Concurrently Registered Remote Office Stations: 0

Maximum Number of DS1 Boards with Echo Cancellation: 0

(NOTE: You must logoff & login to effect the permission changes.)
```

3. Ensure that the Maximum Concurrently Registered IP Stations? option is set to a number greater than zero. This number represents the total number of IP stations that can be connected to the *DEFINITY*[®] system at one time. IP stations can consist of *CentreVu*[®] IP Agent, *DEFINITY*[®] IP SoftPhone, and IP telephone sets.
4. Navigate to Page 3 of the customer-options form.

```
display system-parameters customer-options Page 3 of 9
OPTIONAL FEATURES

Emergency Access to Attendant? y      ISDN-BRI Trunks? y
Extended Cvg/Fwd Admin? n             ISDN-PRI? y
External Device Alarm Admin? n        Malicious Call Trace? y
Flexible Billing? n                    Mode Code for Centralized Voice Mail? n
Forced Entry of Account Codes? y
Global Call Classification? y          Multifrequency Signaling? n
Hospitality (Basic)? y                 Multimedia Appl. Server Interface (MASI)? n
Hospitality (G3V3 Enhancements)? y    Multimedia Call Handling (Basic)? n
H.323 Trunks? y                       Multimedia Call Handling (Enhanced)? n
IP Stations? y                         Multiple Locations? y
ISDN Feature Plus? n                  Personal Station Access (PSA)? y
ISDN Network Call Redirection? y
```

(NOTE: You must logoff & login to effect the permission changes.)

5. Ensure that the IP Stations? feature is set to y
6. Navigate to Page 6 of the customer-options form.

```
display system-parameters customer-options Page 6 of 9
CALL CENTER OPTIONAL FEATURES

VDN of Origin Announcement? y        VuStats? y
VDN Return Destination? y            VuStats (G3V4 Enhanced)? y

Logged-In ACD Agents: 5200           Logged-In CentreVu Advocate Agents: 5200
Logged-In IP Softphone Agents: 5200
```

(NOTE: You must logoff & login to effect the permission changes.)

7. Ensure that the Logged-In IP Softphone Agents: option is set to a number greater than zero. This number represents the total number of agents using IP softphones that can be connected to the *DEFINITY*[®] system at one time.

If you have a *DEFINITY*[®] ECS release previous to R9, the following steps do not apply to your system.

Administering DEFINITY for CentreVu IP Agent

8. Navigate to Page 9 of the customer-options form.

```
display system-parameters customer-options Page 9 of 9
MAXIMUM IP REGISTRATIONS BY PRODUCT ID

Product ID  Rel. Limit  Product ID  Rel. Limit  Product ID  Rel. Limit
IP_Agent    : 400      _____ : 0           _____ : 0
IP_Phone    : 10      _____ : 0           _____ : 0
IP_RCMMax   : 10      _____ : 0           _____ : 0
IP_Soft     : 10      _____ : 0           _____ : 0
_____     : 0           _____ : 0           _____ : 0
_____     : 0           _____ : 0           _____ : 0
_____     : 0           _____ : 0           _____ : 0
_____     : 0           _____ : 0           _____ : 0
_____     : 0           _____ : 0           _____ : 0
_____     : 0           _____ : 0           _____ : 0
```

(NOTE: You must logoff & login to effect the permission changes.)

9. Ensure that the Limit: field for the IP_Agent Product ID is set to the number of licenses you purchased for *CentreVu*® IP Agent.

Ensuring CALLMASTER VI compatibility\

This section provides the procedure for ensuring that your *DEFINITY*[®] ECS is configured to support *CentreVu*[®] IP Agent in the *CALLMASTER*[®] VI configuration.

Before you begin

Screens presented in this section may differ in appearance from those on your *DEFINITY*[®] ECS. All options on the specified forms mentioned in this procedure are available, but may not be on the page noted.

Important:

If any settings of your *DEFINITY*[®] ECS do not conform with the steps in this procedure, you must contact Avaya to purchase the appropriate options or configuration before you can use *CentreVu*[®] IP Agent.

Steps

To ensure that your *DEFINITY*[®] ECS supports *CentreVu*[®] IP Agent:

1. If you are going to be using *CALLMASTER*[®] VI telephone sets or the 606A1 phone type, you must also ensure that the PC Application Software Translation Exchange (PASTE) feature is enabled. Locate the PASTE (Display PBX Data on Phone)? option and ensure that it is set to y.

```
display system-parameters customer-options Page X of X
OPTIONAL FEATURES

Call Center Release:
      ACD? y      PASTE (Display PBX Data on Phone)? y
      BCMS (Basic)? y      Reason Codes? n
BCMS/VuStats LoginIDs? n      Service Observing (Basic)? y
BCMS/VuStats Service Level? n      Service Observing (Remote/By FAC)? n
Call Work Codes?      Service Observing (VDNs)?
CentreVu Advocate? n      Timed ACW?
CentreVu Dynamic Advocate? n      Vectoring (Basic)? y
DTMF Feedback Signals For VRU? n      Vectoring (Prompting)? y
Expert Agent Selection (EAS)? y      Vectoring (G3V4 Enhanced)?
      EAS-PHD? n      Vectoring (ANI/II-Digits Routing)? n
      Forced ACD Calls? n      Vectoring (G3V4 Advanced Routing)? n
      Least Occupied Agent?      Vectoring (CINPO)? n
      Lookahead Interflow (LAI)?      Vectoring (Best Service Routing)? n
Multiple Call Handling (On Request)? n      Vectoring (Holidays)?
Multiple Call Handling (Forced)? n
```

Validating Feature Access Codes

This section provides the procedure for administering the Feature Access Codes on a *DEFINITY*[®] ECS. Feature Access Codes can be utilized by *CentreVu*[®] IP Agent and provide agents with the ability to perform the following actions:

- Change their current work state
- Login
- Logout
- Adjust the method with which they receive their next call (Auto-In, Manual-In)
- Request supervisor assistance

Before you begin

Before changing Feature Access Codes on the *DEFINITY*[®] ECS, you should have completed the [Ensuring Telecommuter and Road-Warrior compatibility](#) on page 48 procedure to verify that your *DEFINITY*[®] ECS supports *CentreVu*[®] IP Agent.

Feature Access Codes cannot be entered unless the *fac* capability is assigned in the dialplan.

To change settings on the *DEFINITY*[®] ECS, you must have a *DEFINITY*[®] system user ID with the proper administrative permissions.

Important:

Screens presented in this section may differ in appearance from those of your *DEFINITY*[®] ECS. All options on the specified forms mentioned in this procedure are available, but may not be on the page noted.

Steps

To validate Feature Access Codes:

1. Log in to the Station Administration Terminal (SAT) on the *DEFINITY*[®] ECS.
2. Enter **display dialplan** to access the dialplan form and then ensure that the *fac* option is assigned in the dialplan.

If the *fac* option is not assigned in the dialplan, your dialplan does not currently support Feature Access Codes. For more information on configuring your dialplan for Feature Access Codes, see the Administrator's Guide for your *DEFINITY*[®] ECS.

3. Enter **display feature-access-codes** to view the feature-access-codes form.

4. Navigate to Page 4 of the feature-access-codes form.

Non-EAS *DEFINITY*[®] ECS will only display a subset of the access code fields seen in the following graphic.

```

display system-parameters customer-options Page 4 of 6
FEATURE ACCESS CODE (FAC)

Automatic Call Distribution Features

After Call Work Access Code: *73
Assist Access Code: *74
Auto-In Access Code: *70
Aux Work Access Code: *71
Login Access Code: *88
Logout Access Code: *89
Manual-in Access Code: *72
Service Observing Listen Only Access Code: *62
Service Observing Listen/Talk Access Code: *63
Add Agent Skill Access Code: *98
Remove Agent Skill Access Code: *99
Remote Logout of Agent Access Code: *64

Call Vectoring/Prompting Features
Converse Data Return Code: *09

```

The Feature Access Codes seen in this graphic are only an example and do not need to be configured as such on your *DEFINITY*[®] ECS. You are free to determine your own Feature Access Codes.

5. Administer the Feature Access Code for Login and Logout as well as any other FACs that you want available for your agents.

To use the following features the FACs associated with these features must be enabled and assigned:

- After Call Work (ACW)
- Auto-in answer mode
- Manual-in answer mode
- Auxiliary work state (AUX)

If Feature Access Codes are not assigned, see the Administrator's Guide for your *DEFINITY*[®] ECS for instructions on adding Feature Access Codes.

Changing station settings for Telecommuter configurations

This section provides the procedure for changing station settings to support the *Telecommuter* configurations.

Before you begin

Before changing station settings on the *DEFINITY*[®] ECS, you should have completed the [Ensuring Telecommuter and Road-Warrior compatibility](#) on page 48 and [Validating Feature Access Codes](#) on page 52 procedures to verify that your *DEFINITY*[®] ECS supports *CentreVu*[®] IP Agent and Feature Access Codes.

To change settings on the *DEFINITY*[®] ECS, you must have a *DEFINITY*[®] ECS user ID with the proper administrative permissions.

Steps

To change station settings to support the Telecommuter configuration:

1. Log in to the Station Administration Terminal (SAT) on the *DEFINITY*[®] ECS.
2. Enter **change station XXXXX** where XXXXX is the number of the station to be used with *CentreVu*[®] IP Agent.

The *DEFINITY*[®] ECS displays the change station form for the specified station.

```

change station 44444                                     Page 1 of 6
                                     STATION
Extension: 44444                                         Lock Messages? n      BCC: 0
Type: 8434D                                             Security Code: 1234   TN: 1
Port: X                                                 Coverage Path 1:     COR: 1
Name: IP Agent Station 44444                           Coverage Path 2:     COS: 1
                                                         Hunt-to Station:
STATION OPTIONS
Loss Group: 2_                                         Personalized Ringing Pattern: 1
Data Module? n                                         Message Lamp Ext: 44444
Speakerphone: 2-way                                    Mute Button Enabled? y
Display Language: english                              Expansion Module? n
                                                         Media Complex Ext:
                                                         IP SoftPhone? y
    
```

3. In the Phone Type: field, enter the type of telephone that *CentreVu*[®] IP Agent will emulate.

Avaya recommends using one of the following phone types because of the number of features available and the ability to display the most characters for contact center or call information.

- **8434D**
- **606A1** (This phone type is not available unless you have purchased and enabled the PASTE feature.)

CentreVu[®] IP Agent can take over the administration and functionality of a real DCP telephone set. The physical telephone set must be one of those listed in [Compatible phone types for CentreVu IP Agent V2](#) on page 21 in the [Introduction](#) section. The physical telephone set is unusable while *CentreVu*[®] IP Agent is registered with its extension. The telephone set will become usable again the *CentreVu*[®] IP Agent session is disconnected from the *DEFINITY*[®] system.

If an agent does not have an on-site station with a DCP connection to the *DEFINITY*[®] ECS and only connects to the *DEFINITY*[®] ECS remotely, the phone type is emulated through *CentreVu*[®] IP Agent which then provides the appropriate functionality.

If the **8434D** phone type was selected and more feature buttons are needed for the station, enter **y** in the Expansion Module? field.

4. Enter one of the following options in the Port: field:

- **X** — This option specifies that station administration is done without hardware.
- **<port>** — This option is used for situations where a remote agent takes direct control of a real extension that has a Digital Communications Protocol (DCP) connection to the *DEFINITY*[®] system. Enter the port number of the actual telephone assigned to this extension. When a remote agent logs in to this extension using *CentreVu*[®] IP Agent, the actual telephone that is locally connected to the *DEFINITY*[®] port is disabled and cannot be used.

5. Enter a number in the Security Code: field that will be used as a password during the extension login to the *DEFINITY*[®] system.

If a security code is not entered, this station will not be able to log in to the *DEFINITY*[®] ECS.

6. Set the IP Softphone? field to **y**.

7. Navigate to Page 2 of the change station form.

```

change station 44444                                     Page 2 of 5
STATION
FEATURE OPTIONS
  LWC Reception: spe                               Auto Select Any Idle Appearance? n
  LWC Activation? y                                 Coverage Msg Retrieval? y
  LWC Log External Calls? n                         Auto Answer: none
  CDR Privacy? n                                    Data Restriction? n
  Redirect Notification? y                           Idle Appearance Preference? n
  Per Button Ring Control? n                         Restrict Last Appearance? y
  Bridged Call Alerting? n
  Active Station Ringing: single

  H.320 Conversion? n                               Per Station CPN - Send Calling Number? _
  Service Link Mode: as-needed
  Multimedia Mode: enhanced
  MMI Served User Type: _____                 Display Client Redirection? n
  AUDIX Name: _____                           Select Last Used Appearance? n
  Messaging Server Name: _____                 Coverage After Forwarding? s
                                                    Multimedia Early Answer? n
                                                    Direct IP-IP Audio Connections? y
                                                    IP Audio Hairpinning? y

```

8. Set the Multimedia Mode: field to **enhanced**.

9. Set the Service Link Mode: field to one of the following options:

- **as-needed** — Use this setting if the station has low call traffic or if you have to pay toll charges for calls.
- **permanent** — Use this setting if the station has high call traffic or if it is set as an auto-answer station.

10. If the Auto Answer: field is set to All or ACD on the station or agent form, you must enable the **Enable support for auto answer** option on the PC and then reboot. You can find this option under **Tools > Program Options** in the *CentreVu*[®] IP Agent main window.

11. Navigate to Page 3 of the change station form.

```

change station 44444                                     Page 3 of 5
STATION
SITE DATA
  Room: _____                               Headset? n
  Jack: _____                               Speaker? n
  Cable: _____                             Mounting: d
  Floor: _____                             Cord Length: 0
  Building: _____                         Set Color: _____

ABBREVIATED DIALING
  List1: _____                             List2: _____                             List3: _____

BUTTON ASSIGNMENTS
  1: call-appr                               6: manual-in                               Grp: _____
  2: call-appr                               7: after-call                              Grp: _____
  3: call-appr                               8: assist                                  Grp: _____
  4: _____                                9: aux-work                                RC: _ Grp: _____
  5: auto-in                                Grp: _____                             10: aux-work                               RC: 0 Grp: _____

```

12. On pages 3, 4, and 5 of the station administration forms, assign functions to each button you want to appear in your *CentreVu*[®] IP Agent Phone Features.

The following functions must be assigned to buttons:

- **auto-in** — This function makes agents available for new calls immediately after they finish with current calls.

Changing station settings for Telecommuter configurations

- manual-in — This function keeps agents from receiving calls until they change their state to Available (AVAIL).
- after-call — This function places agents in the After Call Work (ACW) state.
- aux-work — This function places agents in the Auxiliary Work (AUX) state. The first button assigned as aux-work on an EAS station with reason codes must have a reason code of **0** or be left blank.

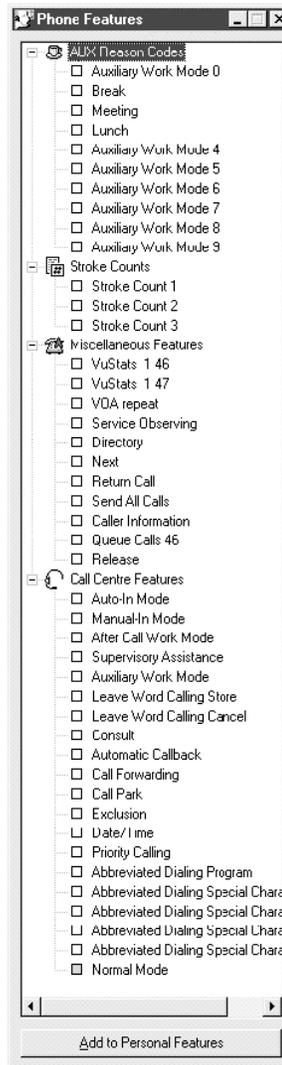
A blank reason code will prompt the user to enter a reason code when the associated AUX button is selected.

- release — This function terminates the current call and line appearance.

Administering DEFINITY for CentreVu IP Agent

- callr-info — Used with Call Prompting to allow agents to display information collected from the originator.

When this station is connected to the *DEFINITY*[®] ECS, the assigned button functions are displayed in the *CentreVu*[®] IP Agent **Phone Features** window.



You can find information on all available button functions in the Administrator's Guide for your *DEFINITY*[®] ECS.

Changing station settings for Road-Warrior configurations

This section provides the procedure for changing station settings to support *Road-Warrior* configurations.

Before you begin

Before changing station settings on the *DEFINITY*[®] ECS, you should have completed the [Ensuring Telecommuter and Road-Warrior compatibility](#) on page 48 and [Validating Feature Access Codes](#) on page 52 procedures to verify that your *DEFINITY*[®] ECS supports *CentreVu*[®] IP Agent and Feature Access Codes.

To change settings on the *DEFINITY*[®] ECS, you must have a *DEFINITY*[®] ECS user ID with the proper administrative permissions.

Steps

To change station settings to support Road-Warrior (VoIP) configurations:

1. Log in to the Station Administration Terminal (SAT) on the *DEFINITY*[®] ECS.
 2. To use *CentreVu*[®] IP Agent in the Road-Warrior (VoIP) configuration, you must administer a Media Complex Extension which is used for the audio portion of the call.

Start the creation of a Media Complex Extension by entering **add station XXXXX** where XXXXX is a number that is not assigned to a station. This extension number must conform to your dialplan. If you have already created Media Complex Extensions, you can proceed to Step 7.
-  **Important:**
Do not specify a Security Code for the Media Complex Extension.
3. Set the Type: field to **H.323**.
 4. Ensure that the Port: field was automatically set to **X**.
 5. In the Name: field, Avaya recommends that you enter a descriptive string of characters with "Media Complex Ext" included to simplify identification.
 6. Press the <Enter> key to save your changes.

7. Enter **add station XXXXX** or **change station XXXXX** where XXXXX is the number of the station to be used with *CentreVu*[®] IP Agent.

The *DEFINITY*[®] ECS displays the change station form for the specified station.

```

change station 44444                                     Page 1 of 5
STATION
Extension: 44444                                         Lock Messages? n      BCC: 0
Type: 8434D                                             Security Code: 1234   TN: 1
Port: X                                                 Coverage Path 1: _____  COR: 1
Name: IP Agent Station 44444                          Coverage Path 2: _____  COS: 1
Hunt-to Station: _____

STATION OPTIONS
Loss Group: 2                                           Personalized Ringing Pattern: 1
Data Module? n                                           Message Lamp Ext: 44444
Speakerphone: 2-way                                     Mute Button Enabled? y
Display Language: english                               Expansion Module? n
Media Complex Ext: 43444
IP SoftPhone? y
  
```

8. In the Phone Type: field, enter the type of telephone that *CentreVu*[®] IP Agent will emulate.

Avaya recommends using one of the following phone types because of the number of features available and the ability to display the most characters for contact center or call information.

- **8434D**
- **606A1** (This phone type is not available unless you have purchased and enabled the PASTE feature.)

CentreVu[®] IP Agent can take over the administration and functionality of a real DCP telephone set. The physical telephone set must be one of those listed in [Compatible phone types for CentreVu IP Agent V2](#) on page 21 in [Introduction](#). The physical telephone set is unusable while *CentreVu*[®] IP Agent is registered with its extension. The telephone set will become usable again the *CentreVu*[®] IP Agent session is disconnected from the *DEFINITY*[®] system.

If an agent does not have an on-site station with a DCP connection to the *DEFINITY*[®] ECS and only connects to the *DEFINITY*[®] ECS remotely, the phone type is emulated through *CentreVu*[®] IP Agent which then provides the appropriate functionality.

If the **8434D** phone type was selected and more feature buttons are needed for the station, enter **y** in the Expansion Module? field.

9. Enter one of the following options in the Port: field:

- **X** — This option specifies that station administration is done without hardware.
- **<port>** — This option is used for situations where a remote agent takes direct control of a real phone that has a Digital Communications Protocol (DCP) connection to the *DEFINITY*[®] ECS. Enter the port number of the actual phone assigned to this extension.

Changing station settings for Road-Warrior configurations

10. Enter a number in the Security Code: field that will be used as a password during the extension login to the *DEFINITY*[®] system.

If a security code is not entered, this station will not be able to log in to the *DEFINITY*[®] ECS.

11. Set the Media Complex Ext: field to the number of the station that you created earlier in Step 2.
12. Set the IP Softphone? field to **y**.
13. Navigate to Page 2 of the change station form.

```
change station 44444                                     Page 2 of 5
STATION
FEATURE OPTIONS
LWC Reception: spe                                     Auto Select Any Idle Appearance? n
LWC Activation? y                                       Coverage Msg Retrieval? y
LWC Log External Calls? n                               Auto Answer: none
CDR Privacy? n                                         Data Restriction? n
Redirect Notification? y                               Idle Appearance Preference? n
Per Button Ring Control? n                             Restrict Last Appearance? y
Bridged Call Alerting? n
Active Station Ringing: single
H.320 Conversion? n                                   Per Station CPN - Send Calling Number? _
Service Link Mode: as-needed
Multimedia Mode: enhanced
MWI Served User Type: _____                       Display Client Redirection? n
AUDIX Name: _____                                   Select Last Used Appearance? n
Messaging Server Name: _____                       Coverage After Forwarding? s
                                                         Multimedia Early Answer? n
                                                         Direct IP-IP Audio Connections? y
                                                         IP Audio Hairpinning? y
```

14. Set the Service Link Mode: field to one of the following options:

- **as-needed** — Use this setting if the station has low call traffic or if you have to pay toll charges for calls.
- **permanent** — Use this setting if the station has high call traffic or if it is set as an auto-answer station.

15. Set the Multimedia Mode: field to **enhanced**.

16. If the Auto Answer: field is set to All or ACD on the station or agent form, you must enable the **Enable support for auto answer** option on the PC and then reboot. You can find this option under **Tools > Program Options** in the *CentreVu*[®] IP Agent main window.

17. Navigate to Page 3 of the change station form.

```

change station 44444                                     Page 3 of 5
                STATION

SITE DATA
Room: _____ Headset? n
Jack: _____ Speaker? n
Cable: _____ Mounting: d
Floor: _____ Cord Length: 0
Building: _____ Set Color: _____

ABBREVIATED DIALING
List1: _____ List2: _____ List3: _____

BUTTON ASSIGNMENTS
1: call-appr                               6: manual-in           Grp: _____
2: call-appr                               7: after-call          Grp: _____
3: call-appr                               8: assist              Grp: _____
4: _____                               9: aux-work           RC: _ Grp: _____
5: auto-in                               Grp: _____        10: aux-work          RC: 0 Grp: _____
    
```

18. On pages 3, 4, and 5 of the station administration forms, assign functions to each button you want to appear in your *CentreVu*[®] IP Agent Phone Features.

The following functions must be assigned to buttons:

- auto-in — This function makes agents available for new calls immediately after they finish with current calls.
- manual-in — This function keeps agents from receiving calls until they change their state to Available (AVAIL).
- after-call — This function places agents in the After Call Work (ACW) state.
- aux-work — This function places agents in the Auxiliary Work (AUX) state. The first button assigned as aux-work on an EAS station with reason codes must have a reason code of **0** or be left blank.

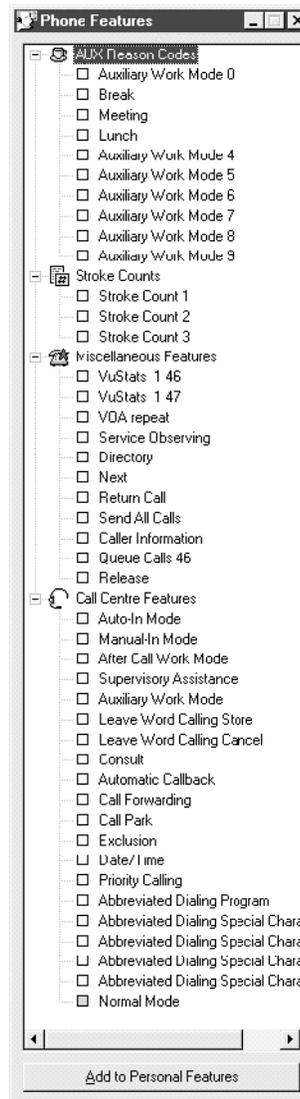
A blank reason code will prompt the user to enter a reason code when the associated AUX button is selected.

- release — This function terminates the current call and line appearance.

Changing station settings for Road-Warrior configurations

- callr-info — Used with Call Prompting to allow agents to display information collected from the originator.

When this station is connected to the *DEFINITY*[®] ECS, the assigned button functions are displayed in the *CentreVu*[®] IP Agent **Phone Features** window.



You can find information on all available button functions in the Administrator's Guide for your *DEFINITY*[®] ECS.

Changing station settings for CALLMASTER VI configurations

This section provides the procedure for changing station settings to support the *CALLMASTER*[®] VI configurations for *CentreVu*[®] IP Agent.

Before you begin

Before changing station settings on the *DEFINITY*[®] ECS, you should have completed the [Ensuring Telecommuter and Road-Warrior compatibility](#) on page 48 and [Validating Feature Access Codes](#) on page 52 procedures to verify that your *DEFINITY*[®] ECS supports *CentreVu*[®] IP Agent and Feature Access Codes.

To use *CALLMASTER*[®] VI telephone sets, you must have the PASTE feature enabled on your *DEFINITY*[®] ECS.

To change settings on the *DEFINITY*[®] ECS, you must have a *DEFINITY*[®] ECS user ID with the proper administrative permissions.

Steps

To change station settings to support *CALLMASTER*[®] VI configurations:

1. Log in to the Station Administration Terminal (SAT) on the *DEFINITY*[®] ECS.
2. Enter **change station XXXXX** where XXXXX is the number of the station to be used with *CentreVu*[®] IP Agent.
The *DEFINITY*[®] ECS displays the change station form for the specified extension.
3. In the Type: field, enter **606A1**.
4. In the Port: field, enter the number of the port providing the connection for the *CALLMASTER*[®] VI telephone set.
5. Navigate to Page 3 of the change station form.
6. On pages 3, 4, 5, and 6 of the station administration forms, assign functions to each button you want to appear in your *CentreVu*[®] IP Agent Phone Features.

The following functions must be assigned to buttons:

- auto-in — This function makes agents available for new calls immediately after they finish with current calls.
- manual-in — This function keeps agents from receiving calls until they change their state to Available (AVAIL).
- after-call — This function places agents in the After Call Work (ACW) state.

Changing station settings for CALLMASTER VI configurations

- aux-work — This function places agents in the Auxiliary Work (AUX) state. The first button assigned as aux-work on an EAS station with reason codes must have a reason code of **0** or be left blank.

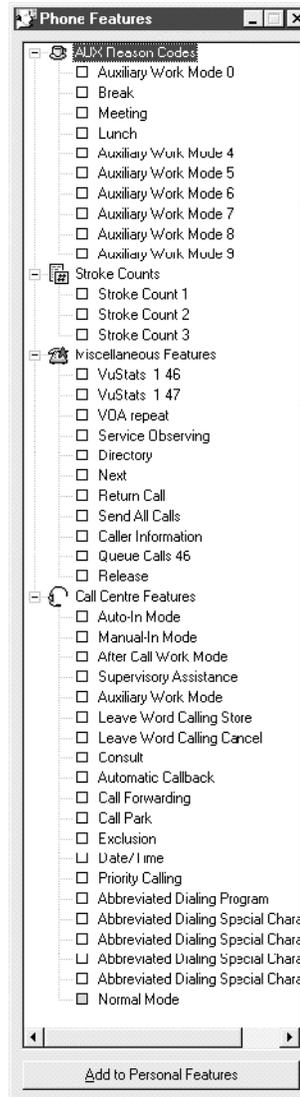
A blank reason code will prompt the user to enter a reason code when the associated AUX button is selected.

- release — This function terminates the current call and line appearance.

Administering DEFINITY for CentreVu IP Agent

- callr-info — Used with Call Prompting to allow agents to display information collected from the originator.

When this station is connected to the *DEFINITY*[®] ECS, the assigned button functions are displayed in the *CentreVu*[®] IP Agent **Phone Features** window.



You can find information on all available button functions in the Administrator's Guide for your *DEFINITY*[®] ECS.

7. After you create a station and assign or modify buttons, you must perform a download for the *CALLMASTER*[®] VI. Go to the PC connected to the *CALLMASTER*[®] VI station and select **Settings > Phone Configuration** from the *CentreVu*[®] IP Agent menu bar. *CentreVu*[®] IP Agent displays a confirmation dialog.
8. Select **OK**.

Required DEFINITY circuit packs

This section provides information on the circuit packs required for your *DEFINITY*[®] ECS so that it supports the *Telecommuter* and *Road-Warrior* configurations with *CentreVu*[®] IP Agent.

This section contains the [Circuit pack descriptions and associated documentation](#) topic

Circuit pack descriptions and associated documentation

This section provides descriptions and lists documentation resources for the circuit packs required on a *DEFINITY*[®] ECS for use with *CentreVu*[®] IP Agent.

The following two circuit packs are used for remote agent connections over TCP/IP with *CentreVu*[®] IP Agent:

- Control LAN Circuit Pack (C-LAN) (TN799B or greater)
- IP Media Processor (TN2302AP)

C-LAN circuit pack

C-LAN is a packet port circuit pack for *DEFINITY*[®] systems that provides TCP/IP connectivity to adjuncts for applications. It has one 10baseT Ethernet connection and up to 16 DS0 physical interfaces for PPP connections. Two integrated modems provide remote PPP connectivity over analog facilities. Multiple C-LAN circuit packs can be added to a system to increase TCP/IP capacity.

This circuit pack provides data signaling over TCP/IP for *CentreVu*[®] IP Agent. It is used for the *Telecommuter* and *Road-Warrior* configurations where a data connection is made to the *DEFINITY*[®] system. The voice path does not use this circuit pack.

IP Media Processor

The IP Media Processor provides the transmission of voice data over an IP network. This enables support of applications that comply with the H.323-v2 protocols. It also reduces per-port costs and improves quality through its dynamic jitter buffers. Additionally, it performs echo cancellation, silence suppression, Dual Tone Multi-Frequency (DTMF) detection, and conferencing.

This circuit pack provides voice over TCP/IP for *CentreVu*[®] IP Agent. It is used for the *Road-Warrior* configuration where a Voice over Internet Protocol (VoIP) is made to the *DEFINITY*[®] ECS.

Documentation

For installation procedures and configuration information for the C-LAN circuit pack, see the *DEFINITY*[®] Administration for Network Connectivity document for your *DEFINITY*[®] ECS.

Circuit pack descriptions and associated documentation

The *DEFINITY*[®] ECS Installation, Upgrades and Additions for Compact Modular Cabinets document for your *DEFINITY*[®] ECS provides installation and configuration information for the IP Media Processor circuit pack. It also provides helpful information on setup and configuration with a C-LAN circuit pack.

Chapter 5: Running CentreVu IP Agent

This chapter explains how to begin using CentreVu IP Agent. It contains the following section:

- [Starting and exiting](#) on page 73

Starting and exiting

This section explains how to connect to your company's Local Area Network (LAN) and how to complete the DEFINITY Login window. Then it tells you how to log into agent mode.

Introduction

Before you can use CentreVu IP Agent as a telephone, you need to first establish connectivity to your company's LAN (Local Area Network) where the DEFINITY server resides. Then you need to register your extension with the DEFINITY server by completing the DEFINITY ECS Login window.

After you are registered with the DEFINITY ECS, you have an operating telephone and can now make, receive, conference, and transfer calls. However, in order to make yourself available for ACD calls, you need to perform an Agent login.

In this section

This section includes the following information:

- [Starting CentreVu IP Agent](#) on page 74
- [Logging into the DEFINITY ECS](#) on page 75
- [Logging into CentreVu IP Agent](#) on page 79
- [Exiting CentreVu IP Agent](#) on page 81

Starting CentreVu IP Agent

Procedure

To start CentreVu IP Agent, do the following:

1. Select Start from the taskbar.
2. Go to Programs from the Start menu.
3. Go to Avaya CentreVu IP Agent.
4. Select CentreVu IP Agent in the language of your choice.

The DEFINITY Login and the CentreVu IP Agent windows appear. Although IP Agent is now running, you are not yet logged into the DEFINITY server.



5. Go to [Logging into the DEFINITY ECS](#) on page 75.

Logging into the DEFINITY ECS

Before you can use CentreVu IP Agent, you need to log on to the DEFINITY ECS.

Procedure

To log into the DEFINITY server, follow these steps:

1. When you start CentreVu IP Agent, the DEFINITY Login window appears. If the Login window does not open, select File and then select Login from the CentreVu IP Agent window.

The DEFINITY Login screen appears.

The screenshot shows the DEFINITY Login dialog box. It has a title bar with the text 'DEFINITY Login'. The main area is divided into several sections. The 'Login Information' section includes an 'Extension' field with a placeholder '(e.g., 5555)', a 'Password' field, a checkbox for 'Remember password for next login', and a 'Server' section with two radio buttons: 'DEFINITY Node Name' (which is selected) and 'IP Address'. Below the radio buttons are dropdown menus for each. The 'AVAYA' logo is positioned to the right of the 'Password' field. The 'Call Control Application' section shows 'CentreVu IP Agent - English'. The 'Voice Connection' section has a dropdown menu set to 'Cable, xDSL or ISDN' and a 'Change...' button. The 'Dialing From' section has a dropdown menu set to 'Home' and a 'Properties...' button. At the bottom of the dialog, there is a checkbox for 'Automatically login if possible when application restarts' and four buttons: 'Log In', 'Cancel', 'Help', and 'About...'.

2. In the Extension box, enter your extension on the DEFINITY server.
3. In the Password box, enter your password.
4. If you want the software to save your password for the next time you log into the DEFINITY server, enable the “Remember password for next login” check box.
5. Do one of the following:
 - If you have logged into the DEFINITY server before, go to Step 7.
 - If this is the first time you are logging into the DEFINITY ECS, continue with Step 6.

Running CentreVu IP Agent

6. In the Server area, enter the DEFINITY node name or IP address for the DEFINITY server, as follows:
 - If you want to enter the node name, click the DEFINITY Node Name option button, and enter the domain name for the DEFINITY server.
 - If you want to enter the IP address, click the IP address option button, and enter the IP address for the DEFINITY server.

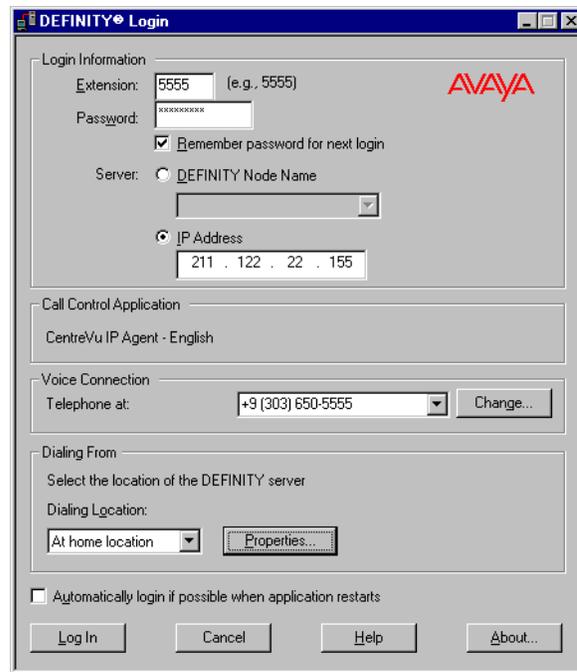
Contact your DEFINITY System Administrator for this information.

Important:

You will not be able to run CentreVu IP Agent with an extension that was registered as an DEFINITY IP Softphone endpoint. If the extension was registered as a DEFINITY IP Softphone endpoint, you will have to log out and exit the registration program. Then, you will have start CentreVu IP Agent and log in again.

7. In the Voice Connection area, do one of the following:
 - If you want to use the information displayed, go to Step 8.
 - If you want to change the information displayed, go to [Configuring the voice connection](#) on page 77.
8. In the Dialing From: area, click the Properties button to set the dialing properties (such as the country and area code) for the DEFINITY system you are logging into.
9. If you want the system to log into the DEFINITY server automatically the next time you start CentreVu IP Agent, enable the “Automatically login if possible when application restarts” check box. You must have logged into the ACD one time before you can use the automatic login option.

The DEFINITY® Login screen displays the information you selected.



- Click Log In. When you successfully log into the DEFINITY server, the system displays the Login Established dialog box, and CentreVu IP Agent starts.

! Important:

If you are using the Telecommuter configuration, the system displays the Verify Telephone Number dialog box. It is very important that you make some test calls before logging in to verify that you have set up your connection properly.

Configuring the voice connection

The Voice Connection dialog box lets you specify whether you want to use CentreVu IP Agent in the RoadWarrior configuration (Voice over IP) (that is, use DEFINITY iClarity IP Audio to hear and speak to the other party on a call) or the Telecommuter configuration

Running CentreVu IP Agent

(Dual Connection) (that is, use a telephone on a separate telephone line to hear and speak to the other party on a call). To select the appropriate Voice Connection:

1. In the Voice Connection dialog box, click the Change button.

The system displays the Voice Connection Configuration dialog box.



2. Do one of the following:

- If you want to use CentreVu IP Agent in the RoadWarrior configuration, select the DEFINITY iClarity IP Audio option button. In this configuration, DEFINITY iClarity IP Audio is the H.323 application you will use to hear and speak to the other party on a call.
- If you want to use CentreVu IP Agent in the Telecommuter configuration, select the Telephone at option button and enter the telephone number of the telephone you will use to hear and speak to the other party on a call.

3. If you selected the DEFINITY iClarity IP Audio option, specify how your PC connects to the DEFINITY server by setting the network bandwidth setting .
4. If you selected the Telephone at option, enter the telephone number of the telephone you want to use.

You will use the handset (or speakerphone) on this telephone to hear and speak to the other party on a call. Be sure to enter this telephone number the way you would dial it from your DEFINITY extension. For example, if the telephone number is an outside call in the same area code as your DEFINITY extension and you must dial a 9 when making outside calls, you would enter 9 at the beginning of the telephone number in this box.

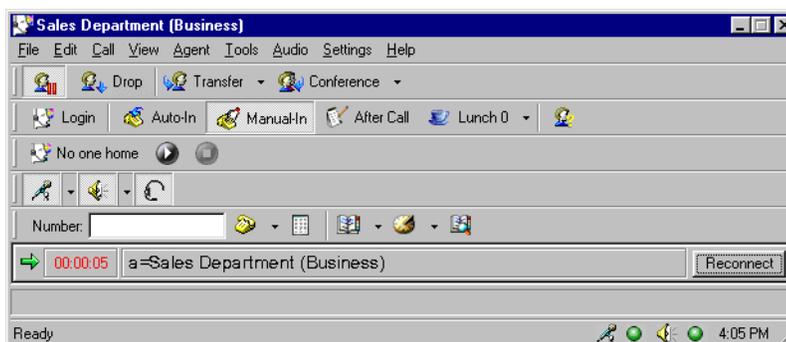
Logging into CentreVu IP Agent

After logging into the DEFINITY server, you will need to log into CentreVu IP Agent in order to receive ACD (Automatic Call Distribution) calls.

Procedure

To log into the program, use the following procedures:

1. In the CentreVu IP Agent window, click the Login button.



The Agent Login dialog box appears.



2. In the Agent Login dialog box, enter your Agent number and Password.
3. Click Login. As soon as you click Login, your voice phone rings.

Important:

If you do not answer your phone immediately or if you entered the wrong number for the voice connection, the following message will appear: "Your call could not be completed. Please try again." You will have to click OK and log in again.

4. Depending on how your DEFINITY ECS is administered, you will be allowed to do either of the following:

Running CentreVu IP Agent

- After you have answered the initial call, leave your phone off hook, and your phone line will stay open. This setting is called “permanent.”
- After you have answered the initial call, hang up, leaving your phone on hook. This means that each time a call is received or made, your phone will ring. This setting is called “as needed.”

The buttons on the Agent toolbar are highlighted, and the title bar displays the Agent number.

5. To get out of AUX work mode, click either the Auto-In or Manual-In button.

For more information about Auto-In and Manual-In work modes, see [Selecting your work mode](#) on page 84.

6. You are now ready to begin receiving and making calls.

Exiting CentreVu IP Agent

Procedure

This procedure tells you how to exit CentreVu IP Agent and log out of the DEFINITY server.

1. To log out of the program, click the Logout button.



2. Depending on your DEFINITY ECS administration, you may be required to enter a reason code. See Using Reason Codes..
3. In the CentreVu IP Agent menu bar, select the File menu and then select Exit.

Chapter 6: CentreVu IP Agent basics

This chapter contains information on the basic operations of *CentreVu*[®] IP Agent.

This chapter includes the following sections:

- [Handling incoming calls](#) on page 84
- [Transferring a call](#) on page 87
- [Conferencing calls](#) on page 91
- [Handling outgoing calls](#) on page 95
- [Handling outgoing calls](#) on page 95
- [Logging into and out of CentreVu IP Agent](#) on page 99

Handling incoming calls

Handling Incoming Calls describes those functions that you will be using every day when you receive an incoming call at your station, including answering a call, holding a call, releasing a call, and transferring a call. The following functions must be administered on the DEFINITY ECS for your station in order to work.

Selecting your work mode

You can elect to set your incoming calls for Auto-In mode or Manual-In mode by selecting the mode in the Agent toolbar. If you are in Auto-In mode, when you complete a call, you are automatically available to receive another call, or you may be placed in After Call Work (ACW) mode for an administered length of time. When the timed ACW interval expires, you are automatically returned to the Auto-In mode. If you try to change agent modes while active on a call, the change is not made until you disconnect from the call.

If you are in Manual-In mode, when you complete a call, you are automatically placed in After Call Work (ACW) mode. In order to become available to receive another ACD call, you must manually enter the Auto-In or Manual-In mode. If you try to change agent modes while not active on a call, the change takes place immediately.

Answering a call

Answering a call depends on how the DEFINITY ECS and network is administered. Each Call Center environment is different, which can affect the way you answer calls. It is suggested that each Call Center evaluate its configuration and instruct the agent on the best way to answer the CentreVu IP Agent phone. There are too many possible CentreVu IP Agent configurations for Lucent to support all of them. Below are suggested procedures on answering calls for two specific configurations.

Configuration 1

Agent administration for Auto Answer is set to station or none. Station Administration for Auto Answer is set to none. Station Administration has service link set to “as-needed.”

Each time a call is received, the analog phone set that provides the voice path will ring, as will the computer, depending upon the CentreVu IP Agent option settings.

To answer a call for this configuration:

1. Wait for the analog phone to ring and answer it. Answering the analog phone will automatically answer the call on the CentreVu IP Agent screen. If there is another call ringing on the screen, do not hang up the analog phone, click the answer button on the CentreVu IP Agent screen and you are now connected to this call.

2. After the calling party disconnects from the call or you click release for that call, hang up the analog phone if no more calls are ringing on the CentreVu IP Agent screen.
3. If there is another call ringing on the screen, do not hang up the analog phone. Click the answer button on the CentreVu IP Agent screen and you are now connected to this call.

Configuration 2

Agent administration for Auto Answer is set to station, ACD, or all. Station Administration for Auto Answer is set to ACD or all. Station Administration has the service link set to “permanent”.

During the event of Agent login, your analog phone will ring to deliver the login confirmation tone.

To answer a call for this configuration:

1. You should answer the phone and not hang it up for the remainder of your Agent shift.
2. If the phone accidentally gets cut off or hung up, the DEFINITY ECS will ring the analog phone when it has a call to deliver. You will then need to answer the analog phone.
3. As with any auto answer phone, the DEFINITY ECS will provide a zip tone (a beep) signaling that a new call has arrived.

Holding a call

You can put a call on hold by using either the Auto Hold or Manual Hold feature.

1. To manually put a call on hold, click the Hold button on the Phone Button toolbar.

The button on your CIP changes to Reconnect.

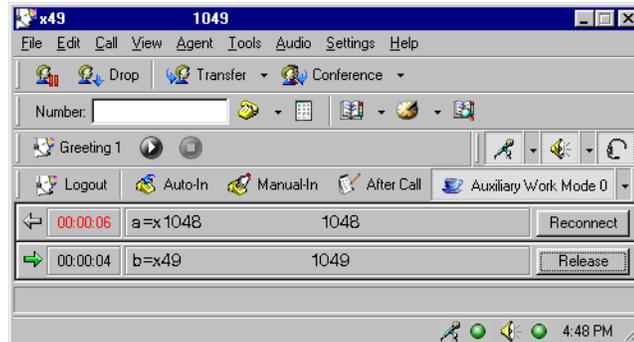


2. You can manually answer a second call while on an active call without having to put the first call on hold. The first call will automatically be put on hold when you answer the second call regardless of whether the Auto Hold or Manual Hold feature is administered for your station.

Releasing a Call

There are three methods you can use to release a call. These methods will work only if the release feature has been administered for your station.

1. To release a call, do one of the following:
 - While on an active call, click the Release button located on the CIP. You will not hear a dial tone after you press Release.
 - Click the Release button located on the Phone Button toolbar.
 - Press the space bar on your keyboard.
2. If you have a call on hold, you must first reconnect it before you can release the call.
In the example below, you would have to reconnect extension 1048 before you could release it.



Dropping a Call

Use the Drop feature when you want to disconnect from a normal call or drop the last party added to a conference call.

1. To drop a call, click the Drop button located on the Phone Button toolbar.
2. You are disconnected from the call and hear a dial tone.

Transferring a call

Transferring a Call describes the following three methods of transferring calls:

- Basic Transfer lets you send the present call to another extension or outside number. You select Transfer, dial the number, announce the call, and select Transfer again.
- Unsupervised Transfer differs from a Basic Transfer in that you select Transfer, type the number to be called into a text box, and click OK to transfer the call. You do not announce the call.
- Enhanced Transfer differs from a Basic Transfer in that you select Transfer, type the number to be called into a text box, and click OK. After announcing the call, you can either click Yes to transfer or No to not transfer the call.

Tip: The Transfer button can be configured for basic, unsupervised, or enhanced transfer in the Options dialog box. However, you can choose a type of transfer different than that configured by selecting the Call menu and then selecting Transfer.

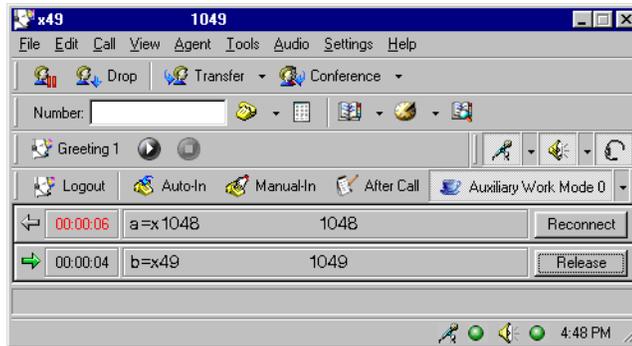
Basic Transfer

To transfer a call using Basic Transfer, follow these steps:

1. While you are active on a call, select Call from the menu bar. Then select Transfer and Basic Transfer.



The current call will automatically be put on hold and a new CIP will appear with dial tone.



2. Enter the number of the party you want to transfer the call to. The numbers are entered using the keyboard or Dial Pad.
3. When the second call is answered, you can privately talk to the party; then select Basic Transfer again to complete the transfer.

Tip: You may complete the transfer at anytime after the number is entered, during the ringing state, or after the second party answers.

Both CIPs disappear from your main callbar indicating that the transfer was successful.

4. You may change the call transfer into a conference by selecting Basic Conference instead of Basic Transfer in Step 3.
5. If there is no answer, the line is busy, or you decide the transfer is not needed, do the following to cancel the transfer:
 - Click the Release button for the party that was going to receive the transfer. This will release that call.
 - Return to the held call by selecting the call state Reconnect button for that held call.

Unsupervised Transfer

To transfer a call using Unsupervised Transfer, follow these steps:

1. While you are active on a call, select Call from the menu bar. Then select Transfer and Unsupervised Transfer.

The Unsupervised Transfer box appears.



2. In the Unsupervised Transfer box, enter the number you want to transfer your existing call to. The number must be typed in, or it can be copied and pasted in.
3. Click OK to transfer the call. You do not have to click the Transfer button a second time to complete the transfer.

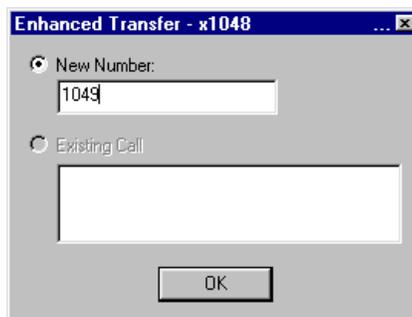
The CIP will disappear from your main callbar, indicating that the transfer was successful.

Enhanced Transfer

To transfer a call using Enhanced Transfer, follow these steps:

1. While you are active on a call, select Call from the menu bar. Then select Transfer and Enhanced Transfer.

The Enhanced Transfer box appears.



2. In the Enhanced Transfer box, enter the number you want to transfer your existing caller to.

! Important:

The number must be typed in, or it can be copied and pasted in.

3. Click OK. The caller will automatically be put on hold and a new CIP will appear with dial tone.

The Transfer the Party? box appears.



4. Remain on the line. If the number dialed is answered, announce the call. Then click the Yes button in the Transfer the Party? box.

Both CIPs disappear from your main callbar indicating that the transfer was successful.

5. If the number dialed is not answered or is busy, click the No button in the “Transfer the Party?” box. Click the Reconnect button to return to the held call.

6. When finished, hang up or click the Drop button.

Conferencing calls

Using Conferencing describes the following two methods of handling conference calls:

- Basic Conference lets you add another party to a call. You select Conference, dial the number, talk to the party to be added to the conference, and select Conference again.
- Enhanced Conference differs from a Basic Conference in that you select Conference, type the number of the party to be added into a text box, and click OK. After talking to the party, you can either click Yes to add or No to not add the party to the call.

Tip: The Conference button can be configured for basic or enhanced conference in the Options dialog box. However, you can override this configuration. Just select Call on the menu bar and then select the method of conferencing you prefer.

For more information on call conferencing, see [Call menu](#) on page 106.

Basic Conference

To conference a call using Basic Conference, follow these steps:

1. While you are active on the call to be conferenced, select Call from the menu bar. Then select Conference and Basic Conference.



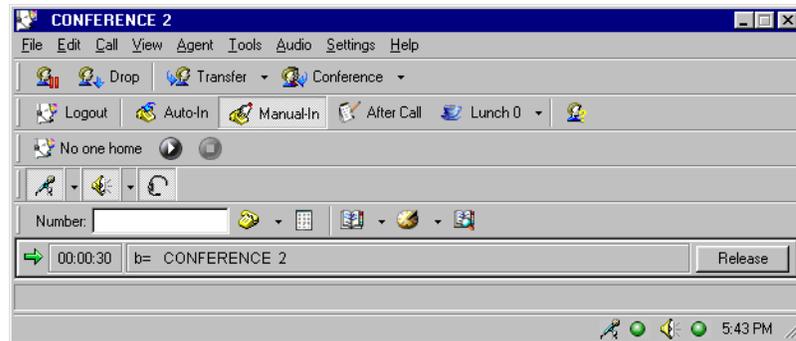
The caller will automatically be put on hold and a new CIP will appear with dial tone.

2. Enter the number of the party you want to add to the call conference. The numbers are entered using the keyboard or the Dial Pad.

- When the second call is answered, you can privately talk to the party; then select Basic Conference again to initiate the conference call.

Tip: You may initiate the conference at any time after the number is entered, during the ringing state, or after the second party answers.

One CIP appears on your main callbar displaying "CONFERENCE 2" (indicating an active conference).



- You may change the call conference into a transfer by selecting Basic Transfer instead of Basic Conference in Step 3.
- Repeat Step 1 through Step 3 until you have conferenced all parties.

The single CIP will display "CONFERENCE X," where X equals the number of parties you added to the call.

If you added three parties to the call, the display on the CIP will say "CONFERENCE 3."

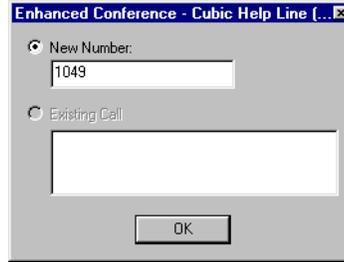


- If there is no answer, the line is busy, or you decide the conference is not needed, do the following:
 - Click the Release button for the party that was going to be added to the conference. This will release that call.
 - Return to the held call by selecting the call state Reconnect button for that held call.

Enhanced Conference

To add another person to a call, or conference a call, follow these steps:

1. While you are on an active call, select Call.
The Call menu appears.
2. From the Call menu, select Conference and then Enhanced Conference.
The Enhanced Conference Number box appears.



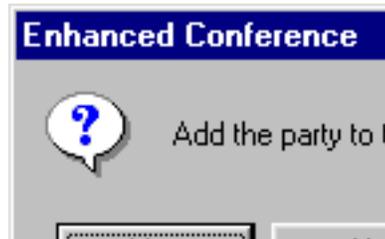
3. In the Enhanced Conference Number box, enter the number of the party you want to add to the call.

! Important:

The number must be typed in, or it can be copied and pasted in.

4. Click OK. The caller will automatically be put on hold and a new CIP will appear with dial tone.

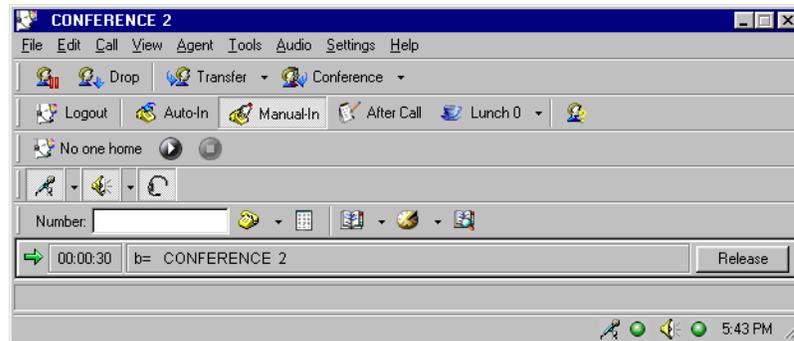
The “Add Party to call?” box appears.



CentreVu IP Agent basics

5. Remain on the line. If the number dialed is answered, you can privately talk to the party. Then click the Yes button in the “Add Party to call?” box to add the party to the call.

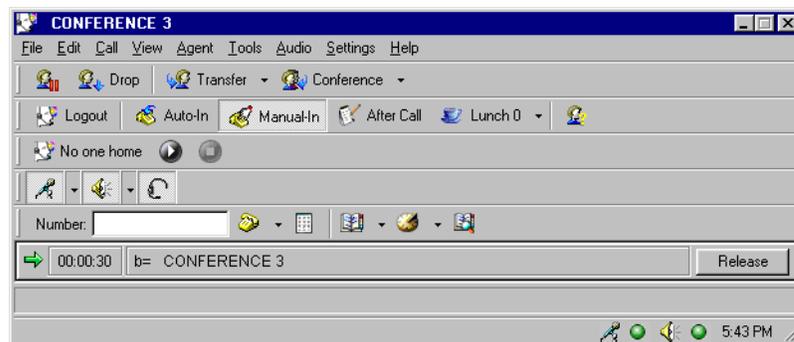
One CIP appears on your main callbar displaying "CONFERENCE 2" (indicating an active conference).



6. If the number dialed is not answered or is busy, click the No button in the “Add Party to call?” box. Click the Reconnect button to return to the original party.
7. Repeat Step 1 through Step 6 until you have conferenced all parties.

The single CIP will display “CONFERENCE X”, where X equals the number of parties you added to the call.

If you added three parties to the call, the display on the CIP will say “CONFERENCE 3”.



8. Any person on the conference call can hang up at any time. The CIP will display "CONFERENCE X," where X equals the number of parties left on the call.
9. To disconnect the last person added to the conference call, click the Drop button.
10. When the conference call is over, click the Release button.
The CIP will disappear from the main callbar.

Handling outgoing calls

There are several ways you can make the handling of outgoing calls more efficient. You can use a recent calls list, a speed dial number, or an abbreviated dial button.

Using a Recent Calls List

You can quickly dial or redial recent incoming or outgoing calls by using a recent calls list. Phone numbers are not duplicated in the list, so if the last ten calls are to the same number, the number will only be displayed in the list once. Calls are only added to the list if they contain a valid phone number.

Some points to know about the recent calls list are:

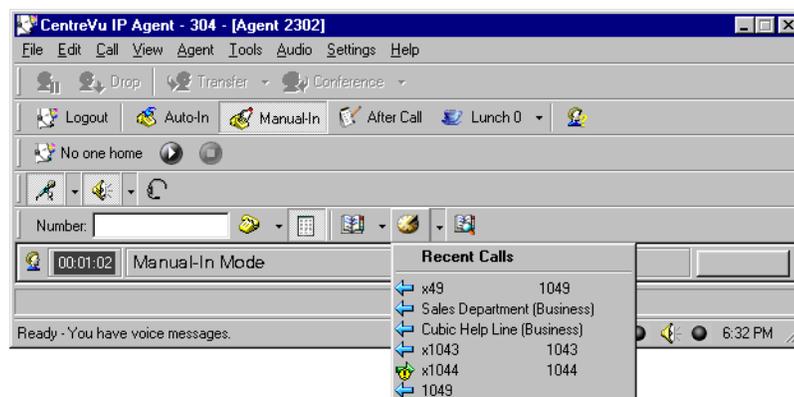
- You or your system administrator can control the number of recent call numbers displayed by setting the number in the Options dialog box.
- The list may show the last 25 unique numbers recorded in the Call History log. Numbers from other sources (abbreviated dial buttons or numbers dialed on active calls (pin numbers) are not included in the list.
- Letters dialed (for example, 1800ABCDXYZ) will appear in the recent calls list as entered, and not as the number translation.

Procedure

To make a call using the Recent Calls list:

1. Click the down arrow next to the Call History button.

A list of previously dialed or previously received numbers appears.



CentreVu IP Agent basics

2. Click the number you want to dial.

The CIP will look like the following example:



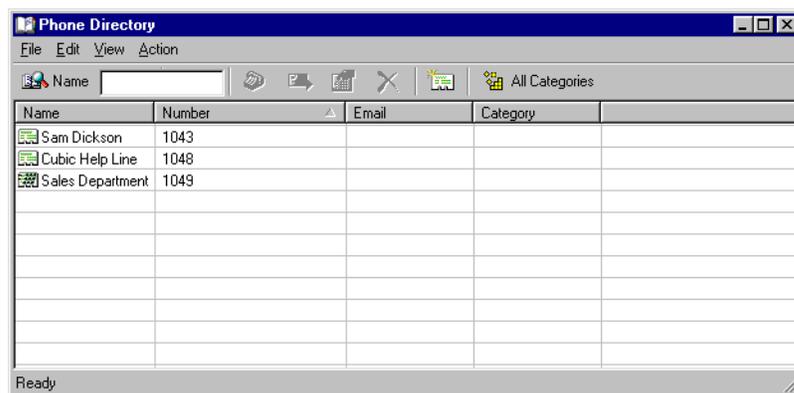
3. The phone number is sent and the called phone will start ringing.

Administering Speed Dialing

CentreVu IP Agent lets you determine speed dial numbers in the Phone Directory Properties dialog box. A speed dial number can be any number in the Phone Directory, up to a maximum of 25 numbers. To use speed dialing, follow these steps:

1. In the CentreVu IP Agent main window, click the Phone Directory button.

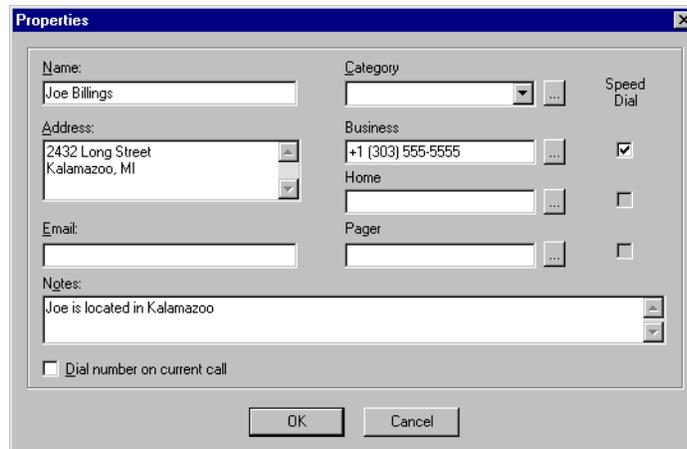
The Phone Directory dialog box appears. Here is an example of a Phone Directory.



2. In the Phone Directory menu, do one of the following:

- If you are creating an entry, click the New Entry button.
- If you are editing an entry, highlight the entry. Select View and then select Properties.

The Properties dialog box appears.



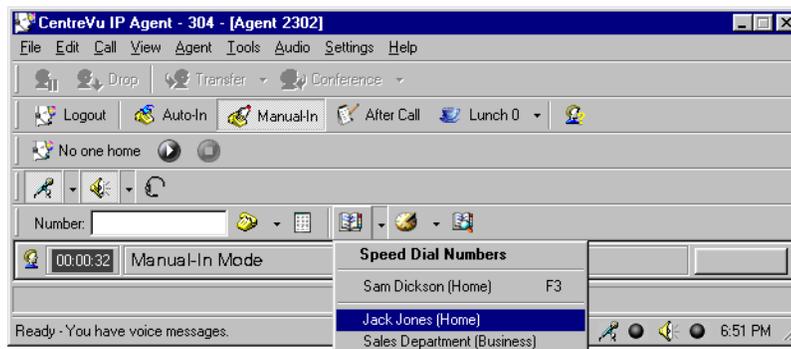
3. Enter or edit the appropriate information in the Properties dialog box fields.

! Important:

For more information on the Phone Directory and Phone Directory Properties dialog boxes, see Using the Phone Directory..

4. Check the Speed Dial button next to the phone number that you want to administer as a speed dial number.
5. Click OK.
6. To use a speed dial number, in the CentreVu IP Agent main window, click the down arrow next to the Phone Directory button.

The speed dial list appears.



7. Click the number you want to dial.
8. The phone number is sent and the called phone will start ringing.

Using an Abbreviated Dial Button

If the Abbreviated Dial feature has been administered on the DEFINITY ECS for your physical station terminal, you can store selected telephone numbers in the Phone Features dialog box for quicker and easier dialing. Each number can be a complete or partial telephone number, an extension number, or a trunk or feature code. To make a call using an Abbreviated Dial button, follow these steps:

1. In the Phone Features dialog box, click the Abbreviated Dial button containing the number you want to dial.

The digits of the phone number will appear in the display area of the CIP.

Tip: The button label for an abbreviated dial is a number (for example, 51008); and the button label for an auto dial button is autodial plus the number (for example, autodial 51008).

2. The phone number is sent and the called phone will start ringing.

Logging into and out of CentreVu IP Agent

Quick reference

Use these procedures to log into and out of CentreVu IP Agent.

1. To log into CentreVu IP Agent, click the Login button.
2. Enter your virtual Extension and Password on the DEFINITY Login window. You need your IP Address or host name and the call back number for the voice connection.
3. Click the Log In button.
4. If CentreVu IP Agent doesn't log in, select File and then select DEFINITY Login in the CentreVu IP Agent window.
5. To log in as an agent, first make sure the phone next to your computer is hung up. Click the gold key (Agent Login button) or press Ctrl+Insert. Enter your Agent ID and Password, and then press the Enter key.
6. The phone next to your computer rings. Answer the call and you will hear the confirmation tone. The Agent buttons on the CentreVu IP Agent window light up.
7. To start taking calls, click the Auto-In button (gold phone with arrow) or press Ctrl+I.
8. To take your break, click the arrow associated with the AUX button (blue cup), and select the reason code, if appropriate.
9. To log out, click the Agent Logout button (gold key with arrow) and enter the logoff reason number code, if appropriate.

Chapter 7: Dialog Reference

This section provides descriptions of the graphical interfaces used in *CentreVu*[®] IP Agent and their basic functionality.

This section contains the following topics:

- [Main window and menus](#) on page 103
- [CentreVu IP Agent option dialogs](#) on page 117
- [Audio dialogs](#) on page 129

Dialog Reference

Main window and menus

This section describes the menus and panels in the *CentreVu*[®] IP Agent main window.

This section includes the following topics:

- [Menu bar](#) on page 104
- [Toolbars](#) on page 113
- [Information panels](#) on page 116

Menu bar

This section provides descriptions and additional information on the items and features found in the menu bar of the *CentreVu*[®] IP Agent window:

This section contains the following topics:

- [File menu](#) on page 105
- [Edit menu](#) on page 106
- [Call menu](#) on page 106
- [View menu](#) on page 107
- [Agent menu](#) on page 109
- [Tools menu](#) on page 110
- [Audio menu](#) on page 111
- [Settings Menu](#) on page 112
- [Help menu](#) on page 112

The *CentreVu*[®] IP Agent main window provides full-function, multi-line telephony support on your PC. This window is also used to access all the features found in *CentreVu*[®] IP Agent.

This section defines all of the items available in the *CentreVu*[®] IP Agent menus. Some menu items only appear when they are valid for your current configuration. For example, the **Call** menu item is not available in an *IP Endpoint* configuration when a call is not currently active. Other menu items and buttons on the interface will be disabled when their functionality cannot be initiated at that time because of configuration, call instance, or agent state.

File menu



The following items are available on the **File** menu item:

- **Login, Logout, DEFINITY Login, or DEFINITY Logout** — These items appear as the first item in this menu and are used for logging the station or agent in and out of the *DEFINITY*[®] ECS.
- **Import Settings** — This menu item gives you the ability to open a file containing settings from another *CentreVu*[®] IP Agent installation and apply those settings to this installation.
- **Export Settings** — This menu item will save the settings from this installation of *CentreVu*[®] IP Agent and save them to a file. This file can then be re-imported to this PC or to another PC with *CentreVu*[®] IP Agent.
- **Exit** — Performs the necessary logouts for the agent and the *DEFINITY*[®] ECS and closes *CentreVu*[®] IP Agent.

Imported and exported settings

Imported and exported files include the all of the following settings:

- All settings available in the **Program Options** window
- Screen pops
- Lightweight Directory Access Protocol (LDAP) servers and settings
- Personal Phone features
- Phone features
- Abbreviated Dialing settings
- Call Centre features
- Telephone button labels
- Audio settings
- Speed-dial settings

Edit menu



The following items are available on the **Edit** menu:

- **Cut** — Removes any highlighted text in the **Number:** field and places it on the Windows clipboard.
- **Copy** — Copies any highlighted text in the **Number:** field and places it on the Windows clipboard.
- **Paste** — Retrieves the last item placed on the Windows clipboard and places it in the **Number:** field.

Call menu

The **Call** menu is only visible when a call is made or received.



The following items are available on the **Call** menu:

- **Release** — Terminates an active call.
- **Drop** — Disconnects from a call without requiring you to hang up the handset, turn off the speakerphone, or press the switchhook.
- **Hold** — Places a call on hold until you can return to it. While the call is on hold, you can place another call, activate a feature, or answer another call.
- **Transfer** — Sends a call from your extension to another extension or outside number. Use this feature when the other party on the call need to speak with someone else. There are three different types of transfers available. See [Transfer types](#) on page 107 in this section for more information.

- **Conference** — Allows you to add other parties to a call. There are two different types of transfers available. See [Conference types](#) on page 107 in this section for more information.

Transfer types

The following types of call transfers are available with *CentreVu*® IP Agent:

- **Basic Transfer** — Select **Transfer**, dial the number, announce the call, and select **Transfer** again.
- **Unsupervised Transfer** — Select **Transfer**, enter the number to be called in the displayed dialog, and select **OK** to transfer the call. You are not able to talk to the party receiving the transferred call with this type of transfer.
- **Enhanced Transfer** — Select **Transfer**, enter the number to be called in the displayed dialog, and select **OK**. You can announce the call and then, in the displayed message box, select **Yes** to complete the transfer or **No** to cancel the transfer.

Conference types

The following types of call conferencing are available with *CentreVu*® IP Agent:

- **Basic Conference** — Select **Conference** which displays another call appearance. Dial the number of the party to add to the conference, announce the conference to the new party, and select **Conference** again to add the new party.
- **Enhanced Conference** — Select **Conference** which displays a dialog box, enter the number to call in the appropriate field, and select **OK**. After announcing the conference to the new party, select **Yes** from the displayed message box to add the new party.

View menu



The following items are available on the **View** menu:

- **Phone Display** — Enabling this item displays a panel above the status bar. This panel can display information from sources such as VuStats or call-prompting digits.

- **Dial Pad** — Enabling this item displays a **DialPad** window which contains a series of numbers and symbols arranged like those on a telephone keypad. You can use your mouse to dial numbers on the **Dial Pad**.



- **Toolbars > Show Labels** — Enabling this item displays labels for the buttons on the [Phone Buttons toolbar](#) on page 113 and the [Agent toolbar](#) on page 114.
- **Toolbars > Phone Buttons** — Enabling this item displays the [Phone Buttons toolbar](#) on page 113 which contains buttons for the Drop, Transfer, Conference, and Hold functions.
- **Toolbars > Dial Number** — Enabling this item displays the [Dial Number toolbar](#) on page 114 which provides a field for entering digits as well as the buttons used to access the call history, the phone directory, the DialPad, and the public directory search.
- **Toolbars > Audio Control** — Enabling this item displays the [Audio toolbar](#) on page 114 which allows the user to enable or disable audio transmission, audio receiving, and the headset. This toolbar is only available for Road-Warrior (VoIP) configurations.
- **Toolbars > Agent** — Enabling this item displays the [Agent toolbar](#) on page 114 which an agent can use to change their work states as well as a Login/Logout button.
- **Toolbars > Agent Greetings** — Enabling this item displays the [Agent Greetings toolbar](#) on page 114 which is used to select, play, and stop agent greetings that have been previously recorded. This toolbar is only available for the Road-Warrior (VoIP) and *CALLMASTER*[®] VI configurations.
- **Headset** — Enabling this item displays the [Headset toolbar](#) on page 115 which contains a button for answering a call or creating a new call appearance when a call is not currently active.
- **Status Bar** — Enabling this item displays the Status Bar at the bottom of the *CentreVu*[®] IP Agent main window. The Status Bar is used to display different types of information such as current activity, notification of voice messages, the state of *CentreVu*[®] IP Agent, tooltips, and others.

Agent menu



The following items are available on the **Agent** menu:

- **Agent Login** — This item displays the **Agent Login** dialog box for entering your EAS Agent login ID number and password.
- **Agent Logout** — This item enables you to log out so that calls are not routed to this extension.
- **Auto-In Mode** — This is an Automatic Call Distribution (ACD) work mode. Agents in the *Auto-In* mode are available to receive new calls as soon as their current call is released.
- **Manual-In Mode** — This is an ACD work mode. Agents in the *Manual-In* mode cannot receive new calls until they manually change their state to *Available*.
- **After Call Work (ACW)** — This is an ACD work mode indicating that an agent is performing tasks related to their last call.
- **Auxiliary Work Mode (AUX)** — This is an ACD work mode indicated that an agent is not available to receive an ACD call. Depending on how the ACD is administered, the AUX work state can require that agents provide a reason code before the state can be assigned.
- **Assist** — This item causes a request for assistance from a skill supervisor.

Tools menu



The following items are available on the **Tools** menu:

- **Phone Features** — Selecting this item displays the **Phone Features** window which lists all feature buttons that have been assigned to this station.
- **Personal Phone Features** — Selecting this item displays the **Personal Phone Features** window which is used to create a smaller list of Phone Features that are used often or for ease of access.
- **Call History** — Selecting this item displays the **Call History** window which shows the history of all calls received by this station including calling party name, calling party number, date, time, duration, and call notes.
- **Phone Directory** — Selecting this item displays the **Phone Directory** window which is used to store names, addresses, phone numbers, and other information.
- **Search Public Directory** — Selecting this item displays the **Search Public Directory** window which allows the searching of LDAP servers by name, telephone number, or e-mail address.
- **Screen Pops** — Selecting this item displays the **Screen Pops** window which lists all of the screen pops that exist on this PC.
- **Agent Greetings** — Selecting this item displays the **Agent Greetings** window which lists all of the agent greetings that exist on this PC. This item is only available for the Road-Warrior (VoIP) and *CALLMASTER*[®] VI configurations.
- **VuStats Monitor** — Selecting this item displays the **VuStats Monitor** window. This window is used to view the VuStats information being sent to this station.
- **Program Options** — Selecting this item displays the **Program Options** dialog for *CentreVu*[®] IP Agent.

Audio menu

! Important:

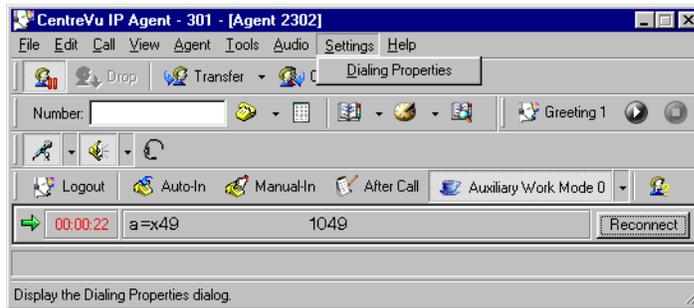
The **Audio** menu is only available for Road-Warrior (VoIP) configurations.



The following items are available on the **Audio** menu:

- **Audio Monitor** — Selecting this item displays the **Audio Meters** window which displays the audio levels currently used for your microphone and speakers.
- **Volume Setting** — Selecting this item displays the Audio Settings window which allows you to verify that your headset is operating properly and to adjust the volume of the headset and microphone.
- **Audio Status** — Selecting this item displays the **Audio Status** window which allows you to verify that your microphone and speakers are operating properly.
- **Audio Options** — Selecting this item displays the **Audio Options** window which allows you to adjust the settings for IP audio such as bandwidth, full- or half-duplex, and gain levels.
- **Tuning Wizard** — Selecting this item runs the **Tuning Wizard** which queries the PC for the optimal settings for Voice over IP.

Settings Menu



The following items are available on the **Settings** menu:

- **Dialing Properties** — Selecting this item displays the Windows **Dialing Properties** dialog box. This dialog box is used to configure number formats, telephony drivers, and special dialing requirements.

Help menu



The following items are available on the **Help** menu:

- **Contents** — Selecting this item displays the table of contents for *CentreVu*[®] IP Agent online help.
- **About CentreVu IP Agent** — Selecting this item displays the **About** dialog box which provides product information for *CentreVu*[®] IP Agent.

Toolbars

This section provides descriptions and additional information on the toolbars of the *CentreVu*[®] IP Agent window: Toolbars contain buttons that provide quick access to specific commands and tools. Toolbars can be added or removed from the main window, by selecting each one in the [View menu](#) on page 107.

This section contains the following topics:

- [Toolbar locations](#) on page 113
- [Phone Buttons toolbar](#) on page 113
- [Dial Number toolbar](#) on page 114
- [Agent toolbar](#) on page 114
- [Agent Greetings toolbar](#) on page 114
- [Audio toolbar](#) on page 114
- [Headset toolbar](#) on page 115

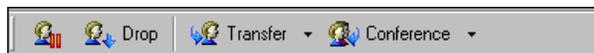
Toolbar locations

Each toolbar can be moved to any location in the main window.

To move a toolbar:

1. Move the mouse pointer on the far-left side of the toolbar until the mouse pointer changes its appearance to the resizing icon.
2. Click and hold the left mouse button.
3. Drag the toolbar to the necessary location. The toolbar will change positions as you move it over different areas of the main window.
4. When the toolbar is correctly positioned in its new location, release the left mouse button.

Phone Buttons toolbar



The **Phone Button toolbar** provides quick access to the basic phone buttons: Hold, Drop, Transfer, and Conference.

The **Transfer** and **Conference** buttons provide drop-down lists allowing the agent to select the type of transfer or conference to make.

Dial Number toolbar



The **Dial Number toolbar** provides a **Number:** field for entering telephone numbers to dial. When you enter a partial string in the **Number:** text box and press the <Enter> key or click the telephone button on the right side of the field, a popup menu displays with a list of the directory entries that start with that string. For example, entering **555** and pressing <Enter> will show all telephone numbers in the **Phone Directory** that start with 555; 555–555–1212, 555–123–4567.

If the first character of the string entered in this field is a letter, the title of the field will be changed from **Number** to **Directory**.

This toolbar also provides single-click for the following:

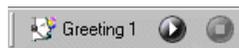
- DialPad window
- Phone Directory window
- Speed-dial drop-down list
- Call History window
- Recent call drop-down list
- Search Public Directory window

Agent toolbar



The **Agent toolbar** provides buttons for agent login and logout and agent states for *DEFINITY*[®] ECS with Expert Agent Selection (EAS).

Agent Greetings toolbar



The **Agent Greetings toolbar** lets you select, play, and stop greetings. This toolbar is only available for Road-Warrior (VoIP) and *CALLMASTER*[®] VI configurations.

Audio toolbar



The Audio toolbar allows control of the following areas:

- microphone status and volume

- speaker status and volume
- headset status

This toolbar is only available in the Road-Warrior (VoIP) configuration.

Headset toolbar



The **Headset toolbar** contains a button used to toggle the headset or handset on or off hook.

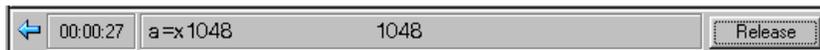
Information panels

This section contains descriptions and information on the areas of the main window that display information to the user.

There are three different types of panels in *CentreVu*[®] IP Agent:

- [Call Information Panel](#) on page 116
- [Agent Information Panel](#) on page 116
- [Phone Display Panel](#) on page 116

Call Information Panel



CentreVu[®] IP Agent displays the **Call Information Panel** only during incoming and outgoing calls. It provides information about the call, such as call status, call display, call duration, and an **Answer/ Release/ Reconnect** button.

If a call is currently active and it is listed in the **Phone Directory**, the name for that contact in the **Phone Directory** will be listed in this panel instead of the information passed from the ACD.

The call status, *incoming*, *outgoing*, or *on-hold*, is displayed in the first section. Click the right mouse button on this panel to display a popup menu containing available options for this call, such as hold, transfer, and conference.

Agent Information Panel



CentreVu[®] IP Agent displays the **Agent Information Panel** when there are no calls and agent status information is available. If you are logged in, the status information also includes the agent mode state.

Phone Display Panel



The **Phone Display panel** is a 40-character display that is located above the Status Bar. This display area is updated automatically with information from the *DEFINITY*[®] ECS including call and non-call related information, such as call-prompting digits, VuStats data, and the local date and time display from the ACD.

CentreVu IP Agent option dialogs

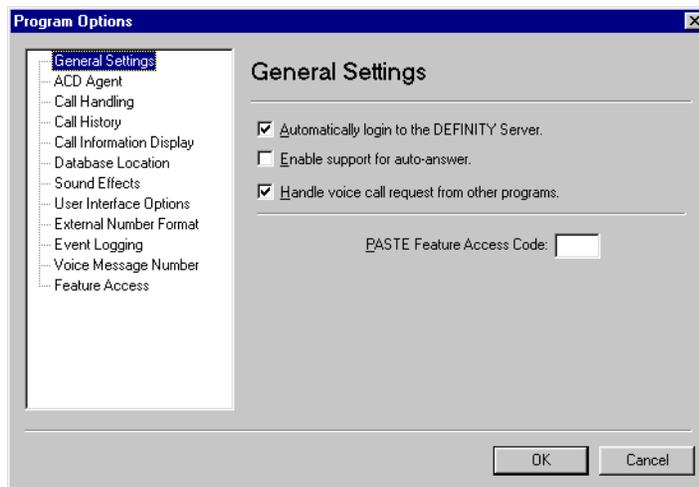
Use the **Program Options** dialog to configure the many feature areas of *CentreVu*[®] IP Agent. Select **Tools > Program Options...** to display this dialog.

This section contains descriptions for the following *CentreVu*[®] IP Agent dialogs:

- [General Settings](#) on page 118
- [ACD Agent](#) on page 119
- [Call Handling](#) on page 120
- [Call History](#) on page 121
- [Call Information Display](#) on page 122
- [Database Location](#) on page 123
- [Sound Effects](#) on page 123
- [User Interface Options](#) on page 124
- [External Number Format](#) on page 125
- [Event Logging](#) on page 126
- [Voice Message Number](#) on page 126
- [Feature Access](#) on page 127

Program Options

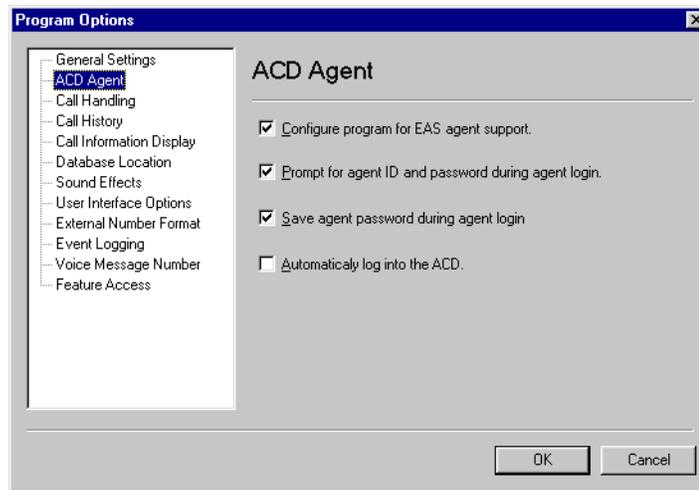
General Settings



The **General Settings** dialog contains the following items:

- **Automatically login to the DEFINITY Server.** — When this check box is enabled, *CentreVu*[®] IP Agent will attempt to log in to the *DEFINITY*[®] server when it is started. It will use the information that was last used for a successful login to the *DEFINITY*[®] server.
- **Enable support for auto-answer.** — When this check box is enabled, *CentreVu*[®] IP Agent will attempt to automatically connect an incoming call without requiring that the agent pick up the handset or click the **Answer** or headset buttons on the main window. For this feature to function, the station must be configured for auto-answer on the *DEFINITY*[®] server.
- **Handle voice call request from other programs** — When this check box is enabled, *CentreVu*[®] IP Agent intercepts requests from other applications on the PC to begin a call and functions as if the call was started through *CentreVu*[®] IP Agent.
- **PASTE Feature Access Code:** — This field is used to re-enter the PC Application Software Translation Exchange (PASTE) code for a *CALLMASTER*[®] VI unit. This code, which is found on the *DEFINITY*[®] server, allows the *CALLMASTER*[®] VI unit to translate information sent from the *DEFINITY*[®] server to *CentreVu*[®] IP Agent. This option is only available for *CALLMASTER* configurations.

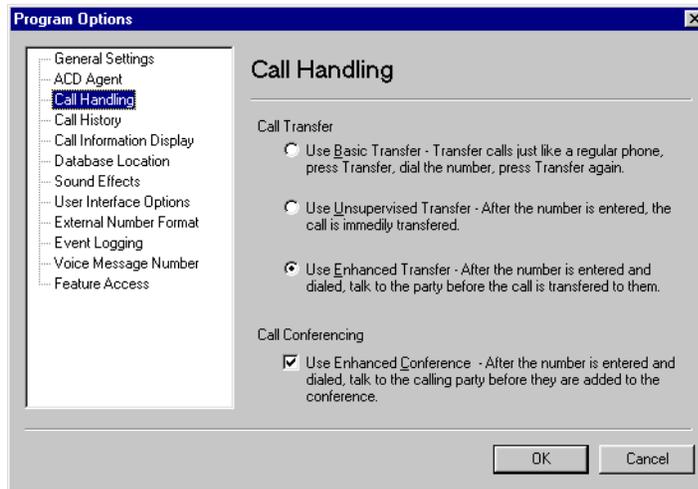
ACD Agent



The **ACD Agent** dialog contains the following items:

- **Configure program for EAS agent support** — Enabling this check box causes *CentreVu*[®] IP Agent to support the Expert Agent Selection (EAS) feature for *DEFINITY*[®] servers.
- **Prompt for agent ID and password during agent login.** — Enabling this check box causes a dialog to be displayed when an agent requests a login to the *DEFINITY*[®] server. The dialog prompts agents for their agent ID and their password.
- **Save agent password during agent login** — Enabling this check box causes *CentreVu*[®] IP Agent to save the password of an agent after a successful login.
- **Automatically log into the ACD** — Enabling this check box will cause *CentreVu*[®] IP Agent to attempt to automatically log in the agent to the *DEFINITY*[®] server after the station has successfully registered with the *DEFINITY*[®] server.

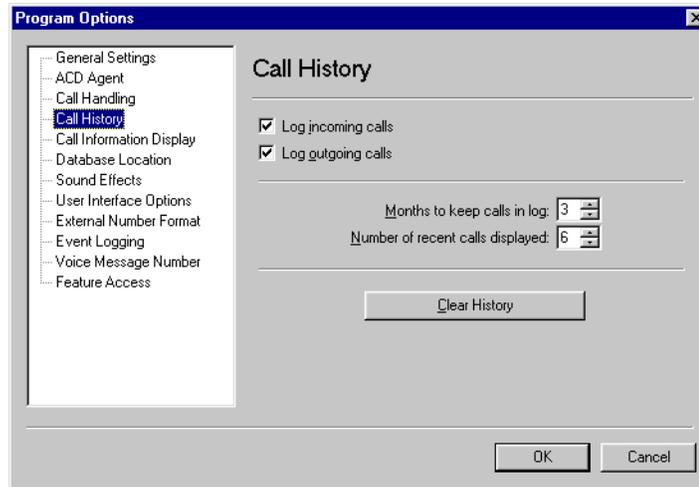
Call Handling



The **Call Handling** dialog contains the following items:

- **Call Transfer - Use Basic Transfer** — Selecting this option sets the default transfer mode to the basic style.
- **Call Transfer - Use Unsupervised Transfer** — Selecting this option sets the default transfer mode to the unsupervised style.
- **Call Transfer - Use Enhanced Transfer** — Selecting this option sets the default transfer mode to the enhanced style.
- **Call Conferencing - Use Enhanced Conference** — Enabling this check box sets the default conferencing mode to the enhanced style. Otherwise, *CentreVu*[®] IP Agent uses the basic conferencing mode.

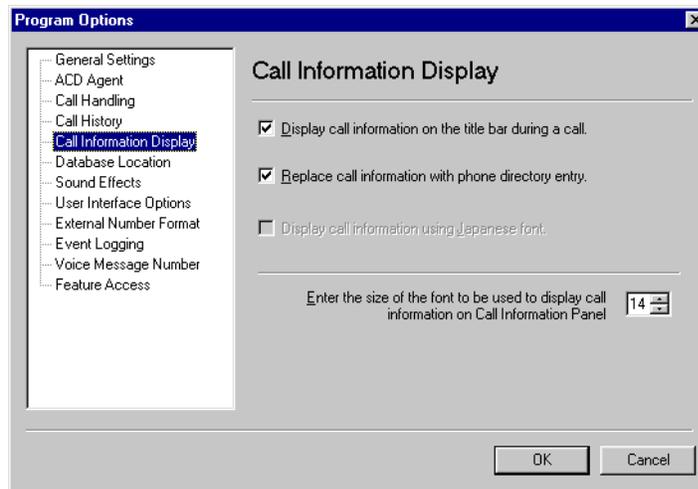
Call History



The **Call History** dialog contains the following items:

- **Log incoming calls** — Enabling this check box causes *CentreVu*[®] IP Agent to make a record of all calls received at this station in the **Call History** log.
- **Log outgoing calls** — Enabling this check box causes *CentreVu*[®] IP Agent to make a record of all calls made from this station in the **Call History** log.
- **Months to keep calls in log:** — Use this field to specify the length in months that call records are stored in the **Call History** log.
- **Number of recent calls displayed:** — Use this field to specify the number of the last ingoing and outgoing calls that are displayed when you click the Call History quick list on the **Number toolbar** of the main window.
- **Clear history** — Selecting this button will clear all call records from the **Call History** log.

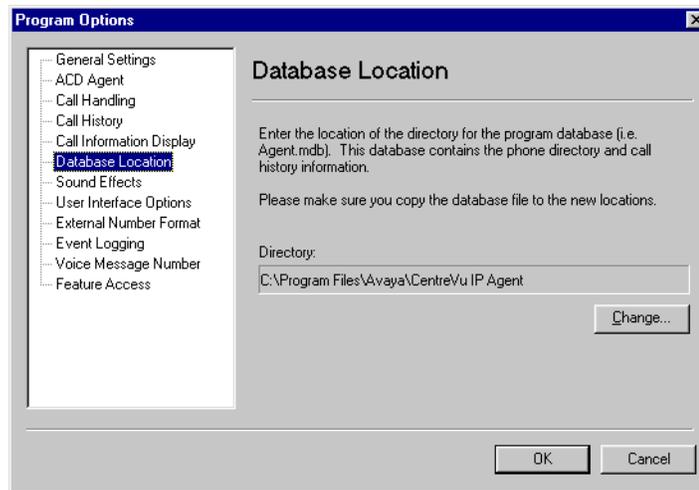
Call Information Display



The **Call Information Display** dialog contains the following items:

- **Display call information on the title bar during a call.** — Enabling this check box causes *CentreVu*[®] IP Agent to display information about the active call in the title bar of the main window.
- **Replace call information with phone directory information.** — Enabling this check box causes *CentreVu*[®] IP Agent to use information from the **Phone Directory** if the telephone number for the active call is found. If the telephone number for the active call is not found, the call information is sent by the *DEFINITY*[®] server.
- **Display call information using Japanese font.** — Enabling this check box will cause *CentreVu*[®] IP Agent to display all information in Japanese. This feature is only available if the Japanese version of *CentreVu*[®] IP Agent was installed.
- **Enter the size of the font to be used to display call information on Call Information Panel** — Use this field to select the point size of the font that *CentreVu*[®] IP Agent uses to display call information in the **Call Information Panel** on the main window.

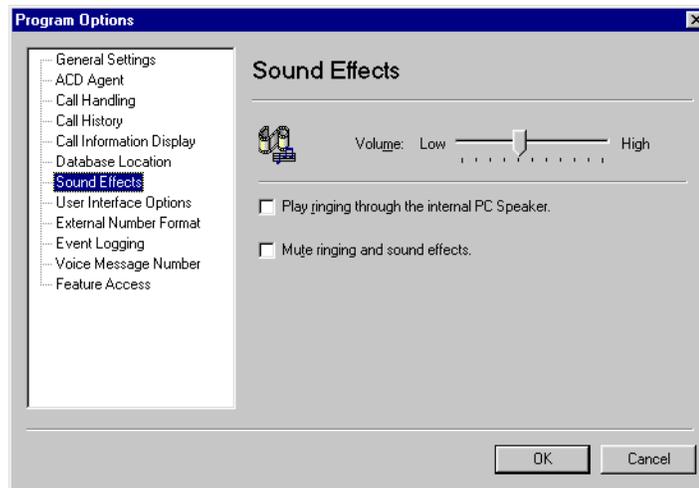
Database Location



The **Database Location** dialog contains the following items:

- **Directory:** — This field displays the current location of the database (Agent.mdb) that *CentreVu*[®] IP Agent uses to store Call History and the Phone Directory.
- **Change...** — Select this button to specify a different location for the *CentreVu*[®] IP Agent database (Agent.mdb).

Sound Effects

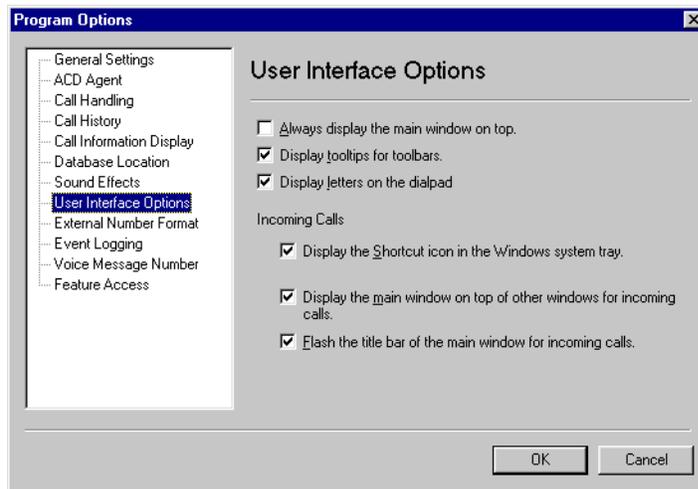


The **Sound Effects** dialog contains the following items:

- **Volume:** — Use this slider control to adjust the volume at which the sound effects are played.

- **Play ringing through internal PC speaker.** — Enabling this check box causes *CentreVu*[®] IP Agent to play the ringing for an incoming call through the internal speaker on the PC instead of playing it through the speakers attached to the sound card.
- **Mute ringing and sound effects.** — Enabling this check box disables the playing of sounds generated by *CentreVu*[®] IP Agent.

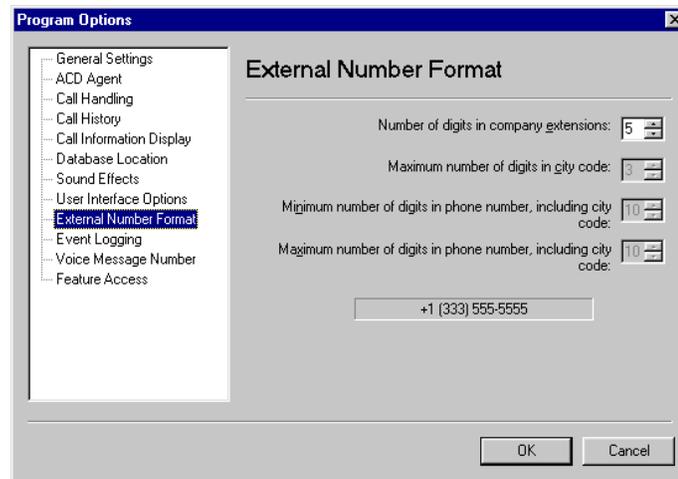
User Interface Options



The **User Interface Options** dialog contains the following items:

- **Always display the main window on top.** — Enabling this check box will keep the *CentreVu*[®] IP Agent in front of all other windows.
- **Display tooltips for toolbars.** — Enabling this check box causes tooltips to appear when the mouse cursor is placed over buttons on the toolbars of the main window.
- **Display letters on the DialPad** — Enabling this check box displays the letters that correspond to the numbers on the number pad of a telephone.
- **Incoming Calls - Display the Shortcut icon in the Windows system tray.** — Enabling this check box displays the *CentreVu*[®] IP Agent icon in the System Tray.
- **Incoming Calls - Display the main window on top of other windows for incoming calls.** — Enabling this check box causes the main window to appear in front of any other application windows that are currently open when a call is incoming.
- **Incoming Calls - Flash the title bar of the main window for incoming calls** — Enabling this check box causes the title bar of the main to flash when a call is incoming. This resembles selection and deselection of the window.

External Number Format

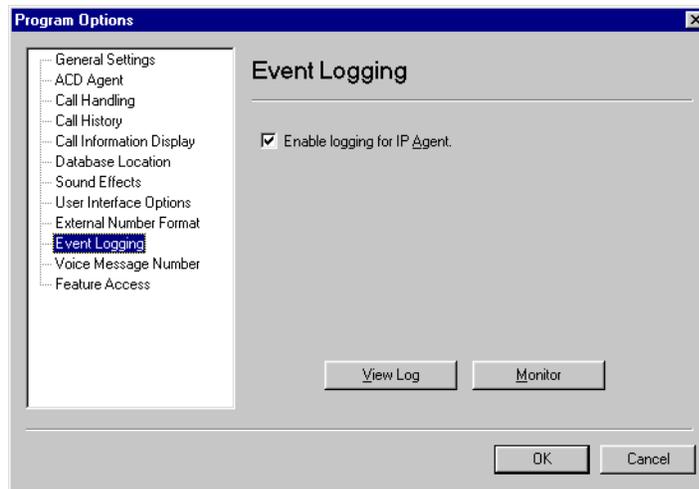


The **External Number Fomat** dialog contains the following items:

- **Number of digits in company extensions:** — Enter the number of digits that are dialed for station extension numbers on your *DEFINITY*[®] server.
- **Maximum number of digits in city code:** — Enter the number of digits that are dialed for telephone numbers that use a code to identify a city. This field may be disabled depending on the Windows dialing format currently specified.
- **Minimum number of digits in phone number, including city code:** — Enter the fewest number of digits that can be used to dial an outgoing call. This number should also include the code used to identify a city. This field may be disabled depending on the Windows dialing format currently specified.
- **Maximum number of digits in phone number, including city code:** — Enter the largest number of digits that can be used to dial an outgoing call. This number should also include the code used to identify a city. This field may be disabled depending on the Windows dialog format currently specified.

When you adjust any of the last three fields, the telephone number displayed in the text box at the bottom of the dialog reflects these changes.

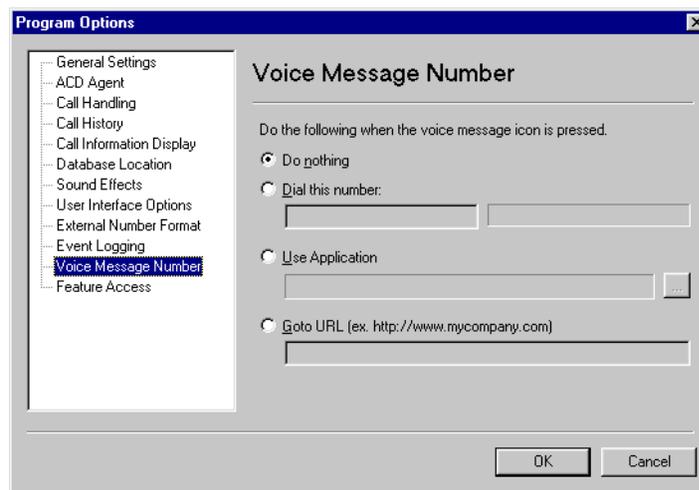
Event Logging



The **Event Logging** dialog contains the following items:

- **Enable logging for IP Agent.** —Enabling this check box causes *CentreVu*[®] IP Agent to record all activity.
- **View Log** — Selecting this button will display the log associated with the specific area designated by the options on the left side of each check box.
- **Monitor** — Selecting this options displays the **Events Monitor** window. This window displays all *CentreVu*[®] IP Agent internal events as they occur.

Voice Message Number

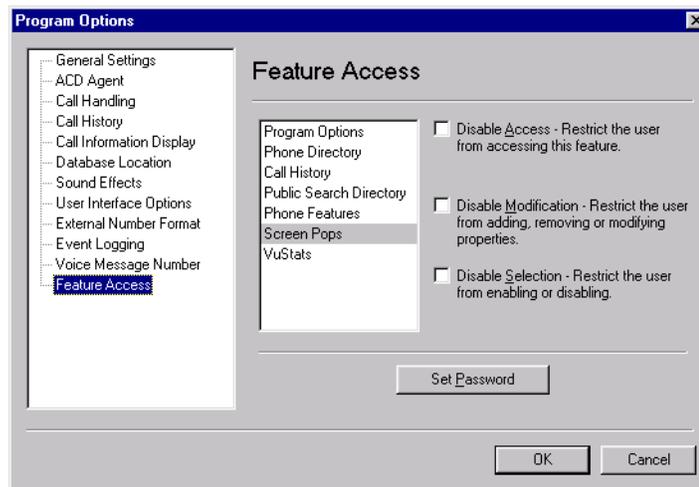


When you have voice messages waiting for you, the System Tray displays an icon. The options on this dialog determine what action to take when this icon is double-clicked.

The **Voice Message Number** dialog contains the following items:

- **Do nothing** — *CentreVu*[®] IP Agent will not initiate any action when the icon in the System Tray is double-clicked.
- **Dial this number:** — When you select this option, you must provide a telephone number or extension to dial in the associated field. When you double-click the icon in the System Tray, *CentreVu*[®] IP Agent dials the number in this field.
- **Use Application** — When you select this option, you must provide the path and filename of an executable to run when you double-click the icon in the System Tray.
- **Goto URL** — When you select this option, you must provide a Universal Resource Locator (URL) address that will be displayed or run when you double-click the icon in the System Tray.

Feature Access



Use the **Feature Access** dialog to restrict users from administering or making changes to the various features of *CentreVu*[®] IP Agent. When any changes are made to the features, you must restart the computer for these restrictions to take effect.

The **Feature Access** dialog contains the following items:

- **Feature List** — Each of the *CentreVu*[®] IP Agent areas listed in this box can be protected from modifications. To select a feature area, click on the feature in this list.
- **Disable Access** — Enabling this check box restricts the user from accessing this feature. This option is not available for the **Program Options** feature. When access is disabled for a feature, the feature will not appear in the menus on the menu bar.
- **Disable Modification** — Enabling this check box restricts the user from altering the feature.
- **Disable Selection** — Enabling this check box restricts the user from activating a screen pop by double-clicking it in the **Screen Pops** window.

Dialog Reference

- **Set Password/Enter Password** — Selecting this button displays the **Change Password...** dialog. When you enter a password, the options for the Feature Access dialog cannot be changed until the proper password is entered.

Audio dialogs

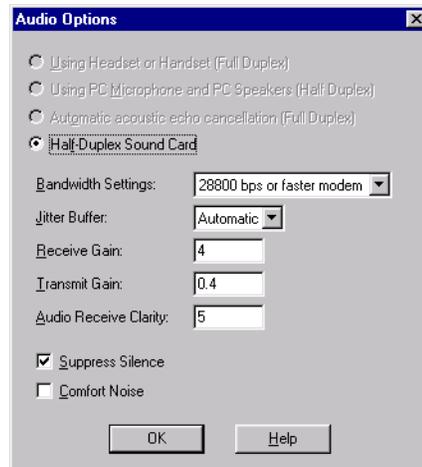
This section provides descriptions of the **Audio Options** and **Audio Tuning Wizard** dialogs. These dialogs are only available for Road-Warrior (VoIP) configurations.

This section contains the following topics:

- [Audio Options dialog](#) on page 130
- [Audio Tuning Wizard](#) on page 132

Audio Options dialog

Descriptions



The **Audio Options** dialog contains the following items:

- **Using Headset or Handset (Full Duplex)** — Select this option button if you are using a headphone or a handset to speak to and hear the other party on a call. This option button is disabled if the **Audio Tuning Wizard** identified a half-duplex sound card in your PC.
- **Using PC Microphone and PC Speakers (Half Duplex)** — Select this option button if you are using a microphone and PC speakers to speak to and hear the other party on a call.
- **Automatic acoustic echo cancellation (Full Duplex)** — Select this option button if you are using a microphone and PC speakers to speak to and hear the other party on a call. This option uses the automatic acoustic echo cancellation feature, which automatically attempts to "filter out" echo. This option button is disabled if the **Audio Tuning Wizard** identified a half-duplex sound card in your PC or you are using Microsoft *Windows NT*[®] 4.0.
- **Half-Duplex Sound Card** — Select this option button if you have a half-duplex sound card in your PC. This option button is disabled if the **Audio Tuning Wizard** identified a full-duplex sound card in your PC.
- **Bandwidth Settings** — Select how your PC connects to the *DEFINITY*[®] server. *CentreVu*[®] IP Agent uses the bandwidth setting to determine which codec to use with the *DEFINITY*[®] server. The *DEFINITY*[®] server supports the following codecs:
 - *G.729a* — This codec may be used for 28800 bps or better modem connection; Cable, xDSL, or ISDN connection; and Local Area Network connection. (This codec is used for low-speed connections.)

- *G.723* — This codec may be used for 28800 bps or better modem connection; Cable, xDSL, or ISDN connection; and Local Area Network connection. (This codec is used for low-speed connections.)
- *G.711 u-law (CCITT u-law)* — This codec may be used for Cable, xDSL, or ISDN connection and Local Area Network connection. (This codec is used for high-speed connections.)
- *G.711 A-law (CCITT A-law)* — This codec may be used for Cable, xDSL, or ISDN connection and Local Area Network connection. (This codec is used for high-speed connections.)

When you connect to the *DEFINITY*[®] server, *CentreVu*[®] IP Agent checks the bandwidth setting you specified, and then determines the actual speed of the connection between your PC and the *DEFINITY*[®] server. *CentreVu*[®] IP Agent then selects the appropriate codec.

NOTE: The actual speed of the connection between your PC and the *DEFINITY*[®] server determines which codec *CentreVu*[®] IP Agent uses.

- **Jitter Buffer** — Displays the size of the jitter buffer, which stores packets to ensure a consistent delivery of voice to your speakers or headset so the voice stream you hear does not contain gaps. The larger the jitter buffer, the longer the delay receiving audio from the other party.
- **Receive Gain** — Sets the gain for incoming sound during a call. It is recommended that this setting be between **0.1 – 100.0**.
- **Transmit Gain** — Set the gain for outgoing sound during a call. It is recommended that this setting be between **0.1 – 10.0**.
- **Audio Receive Clarity** — Adjusts the clarity for incoming sound during a call.
- **Suppress Silence** — Sets whether silence packets are transmitted when there is silence.
- **Comfort Noise** — Sets whether you want *DEFINITY*[®] iClarity IP Audio to generate noise for you when the other party is not speaking. This noise indicates to you that the call is still active.

Audio Tuning Wizard

Descriptions

The **Audio Tuning Wizard** is a program that will detect the hardware and settings for your PC. It will also have you test the levels for your microphone and speakers for optimum performance. Each dialog of the **Audio Tuning Wizard** provides complete instructions on the tasks to be performed and are not described here for that reason.

Appendix A: Quick Reference: Shortcut keys

This appendix contains quick reference information for shortcut keys.

Shortcut keys refer to key combinations that you can use to invoke a particular command. For example, to place a call on hold, you can press <Ctrl> + <H>. Some of the most commonly used shortcut keys are discussed in this section. In order for shortcut keys to work as documented, the *CentreVu*[®] IP Agent window must have focus as the current application.

Shortcut keys

Call features

The following table provides the shortcut keys for call features:

<i>To...</i>	<i>Press...</i>
Place a call on hold	<Ctrl>+<H>
Transfer a call	<Ctrl>+<T> to dial the number and then again to transfer the call
Conference another party	<Ctrl>+<F> to dial the number and then again to conference the call.

Agent features

The following table provides the shortcut keys for the *CentreVu*[®] IP Agent window:

<i>To...</i>	<i>Press...</i>
Log in	<Ctrl>+<Ins>
Log out	<Ctrl>+
Change to After Call Work (ACW) state	<Ctrl>+<W>
Change to Auxiliary (AUX) state	<Ctrl>+<A>
Change Available state assignment to automatic (Auto-In)	<Ctrl><I>
Change Available state assignment to manual (Manual-In)	<Ctrl>+<M>
Request supervisor assistance (Assist)	<Ctrl>+<S>

CentreVu® IP Agent features

The following table provides the shortcut keys for the *CentreVu*® IP Agent window:

<i>To...</i>	<i>Press...</i>
Display the Call History window	<Alt>+<C>
Display the Phone Directory window	<Alt>+<D>
Release the current call	<Spacebar>
Display online help	<F1>
Exit <i>CentreVu</i> ® IP Agent	<Alt>+<F4>

Windows® features

The following table provides the shortcut keys for the *CentreVu*® IP Agent window:

<i>To...</i>	<i>Press...</i>
Switch between running applications	<Alt>+<Tab>
Cut selected text to the clipboard	<Ctrl>+<X>
Copy the selected text to the clipboard	<Ctrl>+<C>
Paste clipboard contents to the selected area	<Ctrl>+<V>

Quick Reference: Shortcut keys

Appendix B: Quick Reference: Language Support

This appendix contains quick reference information for supported languages.

Supported languages for CentreVu IP Agent

CentreVu IP Agent languages table

This table shows the versions of *CentreVu*[®] IP Agent that are supported with the specific language versions of the operating systems. An X indicates that the operating system is supported.

Supported languages for CentreVu IP Agent

Windows Operating System		CentreVu IP Agent Languages								
		English	Italian	French	German	Portuguese (Brazilian)	Spanish (Columbian)	Japanese (Proper)	Korean	Chinese
English	Windows 95	X	X	X	X	X	X			
	Windows 98	X	X	X	X	X	X			
	Windows 2000	X	X	X	X	X	X			
	Windows NT	X	X	X	X	X	X			
	Windows Me	X	X	X	X	X	X			
Italian	Windows 95	X	X							
	Windows 98	X	X							
	Windows 2000	X	X							
	Windows NT	X	X							
	Windows Me	X	X							
French	Windows 95	X		X						
	Windows 98	X		X						
	Windows 2000	X		X						
	Windows NT	X		X						
	Windows Me	X		X						
German	Windows 95	X			X					
	Windows 98	X			X					
	Windows 2000	X			X					
	Windows NT	X			X					
	Windows Me	X			X					
Portuguese	Windows 95	X				X				
	Windows 98	X				X				
	Windows 2000	X				X				
	Windows NT	X				X				
	Windows Me	X				X				
Spanish	Windows 95	X					X			
	Windows 98	X					X			
	Windows 2000	X					X			
	Windows NT	X					X			
	Windows Me	X					X			
Japanese	Windows 95	X						X		
	Windows 98	X						X		
	Windows 2000	X						X		
	Windows NT	X						X		
	Windows Me	X						X		
Korean	Windows 95	X							X	
	Windows 98	X							X	
	Windows 2000	X							X	
	Windows NT	X							X	
	Windows Me	X							X	
Chinese	Windows 95	X								X
	Windows 98	X								X
	Windows 2000	X								X
	Windows NT	X								X
	Windows Me	X								X

US English only CentreVu IP Agent components

The following *CentreVu*[®] IP Agent components are provided only in English:

- Installation
- **About** screen
- Event log
- *CentreVu*[®] IP Agent internal files
- Shortcut keys for secondary callbars
- *readme.txt* file
- Uninstall program

Appendix C: Quick Reference: Troubleshooting

This appendix contains information for troubleshooting problems with *CentreVu*[®] IP Agent.

More Information

If the problem you are experiencing cannot be found in this section, the most current and up-to-date technical support information for CentreVu IP Agent can be found at <http://support.avaya.com>. Select **Call Center/CRM** and then the appropriate links under the **IP Agent** group.

Troubleshooting

Problem	What to do
Cannot register with the <i>DEFINITY</i> [®] ECS.	<p>Check for a valid configuration.</p> <p>The following are not supported:</p> <p><i>CentreVu</i>[®] IP Agent does not support Network Address Translation (NAT), Port Address Translation (PAT), or unsupported Virtual Private Network (VPN).</p> <p>A <i>DEFINITY</i>[®] ECS prior to release 8.2 cannot be used for the <i>Telecommuter</i> or <i>Road-Warrior</i> configurations.</p> <p>A <i>DEFINITY</i>[®] ECS prior to release 6.2 cannot be used for the <i>CALLMASTER</i>[®] VI configuration.</p>
Agents cannot log in to EAS.	<p>Ensure that the following administration items have been addressed:</p> <p>Feature Access Codes are administered.</p> <p>If you are using a Road-Warrior (VoIP) configuration, ensure that an IP Media Processor has been properly configured so that Road-Warrior (VoIP) configurations can operate properly.</p> <p>If the <i>DEFINITY</i>[®] ECS has the station set for Auto-answer, ensure that <i>CentreVu</i>[®] IP Agent has the Enable support for auto answer option enabled.</p>
Agents are logged off repeatedly of EAS or the <i>DEFINITY</i> [®] ECS.	<p>Ensure that the network is not having stability problems or failures in service.</p>

Problem	What to do
Agents cannot place calls.	<p>Ensure that the agent is logged in.</p> <p>Check the Windows Dialing Properties to rule out improper number formatting. Dialing rules must conform to the dialing rules of the country in which the <i>DEFINITY</i>[®] ECS resides.</p> <p>Ensure that calling cards are not being used.</p>
Agent cannot be heard by other party.	<p>Ensure that a defective sound card or microphone is not being used.</p> <p>Ensure that the sound card is configured properly through Windows.</p> <p>Ensure that excessive background or PC noises are not preventing voice transmission.</p> <p>Adjust the gain levels when using full-duplex mode in a noisy environment.</p> <p>Ensure that the mic or headset is not muted.</p>
Excessive bandwidth usage in Voice over IP configurations when not actively on calls.	<p>Change the Service Link Mode: from permanent to as-needed.</p>
Agents cannot establish calls.	<p>Ensure that an improper codec is not in use.</p> <p>Ensure that the bandwidth of the network can support the bandwidth required for Voice over IP.</p>

Quick Reference: Troubleshooting

Problem	What to do
The voice quality of the agent is poor with Voice over IP.	<p>Check to see if the iClarity Status screen displays a high number of dropped packets and a low number of discarded packets. This indicates an inadequate sound card in the PC.</p> <p>Check to see if the iClarity Status screen displays an equal number of dropped and discarded packets. This indicates problems with network bandwidth.</p> <p>If the iClarity Status screen displays the correct information, run the Tuning Wizard again. It can be found under the Audio menu item. The Tuning Wizard cannot be run while the transmit and receive are active. To deactivate the transmit and receive channels, you can either log the station out of the <i>DEFINITY</i>[®] ECS or change the station settings from the <i>DEFINITY</i>[®] ECS to use the as-needed option for the Service Link Mode: field instead of permanent.</p>
The voice quality of the other party is poor when using Voice over IP.	<p>Lower the gain setting on the microphone.</p> <p>Set the Jitter Buffer in the Audio Options to <i>Automatic</i>.</p>
Receiving and transmitting audio is delayed.	<p>Perform one of the following actions:</p> <p>Ensure that your <i>DEFINITY</i>[®] ECS is optimized to handle “shuffling” and “hairpinning” for Voice over IP. Consult your <i>DEFINITY</i>[®] documentation for more information.</p> <p>Lower the Jitter Buffer in the Audio Options.</p>
Receiving echo and poor voice quality while using Voice over IP.	<p>If you are using speakers and a microphone instead of a headset, change to <i>half-duplex</i> in the Audio Options window. Using separate speakers and a microphone can cause feedback situations.</p>

Problem	What to do
<p>Collected digit information is not displayed.</p>	<p>You must have a callr-info button assigned for non-CALLMASTER telephones so that collected digit information is displayed. Buttons are configured for stations through the change station command on the <i>DEFINITY</i>[®] ECS.</p> <p>Ensure that VuStats is deactivated. This can be done by double-clicking on the Normal Mode button in the Phone Features window.</p>
<p>In <i>Telecommuter</i> mode, picking up the handset does not automatically answer the incoming call displayed in the <i>CentreVu</i>[®] IP Agent window.</p>	<p>Ensure that the Service Link Mode: for the station is set to as-needed.</p> <p>Ensure that the Enable support for auto-answer option is disabled. This option is found in the Program Options in <i>CentreVu</i>[®] IP Agent. If this option is enabled, disable it and then reboot your PC.</p> <p>Ensure that the Multimedia Call Handling (Enhanced) option on the <i>DEFINITY</i>[®] ECS is set to y. This option can be found on the system-parameters customer-options form. If this option is not set to y, contact Avaya technical support or your Avaya representative for assistance.</p>
<p>The call information panel is not displaying any data.</p>	<p>This can occur if you are emulating a phone type that is normally configured to display 40 characters of information and it is currently in use because of VuStats, Q-call, or it is already busy with information from another incoming call. You can either change the phone type emulation to one that displays 80 characters of information or disable VuStats so that the call information panel is not committed to displaying this information. See Compatible phone types for CentreVu IP Agent V2 on page 21 in the Introduction section for telephone sets that support 80 character displays.</p>
<p>You changed your login extension but the <i>DEFINITY</i>[®] does not recognize your login.</p>	<p>Reboot your PC and attempt the login procedure again.</p>

Quick Reference: Troubleshooting

Problem	What to do
<p>The settings for one <i>CentreVu</i>[®] IP Agent installation were exported, but the import did not seem to work on another workstation.</p>	<p>Ensure that you are not trying to use exported settings from a <i>CentreVu</i>[®] IP Agent installation on another operating system. Setting exports from an operating system such as Microsoft <i>Windows NT</i>[®] 4.0 cannot be imported on a different operating system such as Microsoft <i>Windows</i>[®] 98. Also, if one <i>CentreVu</i>[®] IP Agent installation is configured for <i>CALLMASTER</i>[®] VI, those settings cannot be imported to a <i>CentreVu</i>[®] IP Agent installation with an <i>IP Endpoint</i> configuration.</p>
<p>The button feature assignments were changed for this station, but the assignments do not display in <i>CentreVu</i>[®] IP Agent or fail to work.</p>	<p>Refresh the phone features. For <i>CALLMASTER</i>[®] VI configurations, select Settings > Phone Configuration from the menu bar. For <i>IP Endpoint</i> configurations, exit and restart <i>CentreVu</i>[®] IP Agent.</p>
<p>The phone download for the <i>CALLMASTER</i>[®] VI failed.</p>	<p>Enter the PASTE code again for the <i>CALLMASTER</i>[®] VI so that the <i>DEFINITY</i>[®] ECS sends the updates to the station. Select Tools > Program Options and enter the number in the PASTE Feature Access Code: field.</p>
<p>The agent does not seem to be logged in because all of the icons are still disabled.</p>	<p>Verify the following configuration items: On the <i>DEFINITY</i>[®] ECS, verify that the station has the following features assigned to buttons: Auto-in, Manual-in, After Call Work (ACW), and Auxiliary Work (AUX). On the <i>DEFINITY</i>[®] ECS, verify that the first AUX work button assigned to the station has a blank reason code or a reason code of 0.</p>
<p>Agent logs in but is immediately logged out.</p>	<p>If the station or agent is administered on the <i>DEFINITY</i>[®] ECS as <i>auto answer</i>, Enable support for auto answer in the Program Options must be enabled in <i>CentreVu</i>[®] IP Agent. After changing this setting in <i>CentreVu</i>[®] IP Agent, you must reboot the PC for the change to take effect.</p>

Problem	What to do
<p>The agent is unable to record greetings.</p>	<p>Attempt the action appropriate for your configuration:</p> <p>For <i>CALLMASTER</i>[®] VI configurations, check to see if the headset button in the Greetings window is activated. If so, click on the button to deactivate it and try to record the greeting again. The headset can also be deactivated through the headset button on the <i>CALLMASTER</i>[®] VI unit.</p> <p>For Road-Warrior (VoIP) configurations, the recording of agent greetings can only be done when the transmit and receive audio connections are inactive. You can logoff and restart <i>CentreVu</i>[®] IP Agent to record agent greetings, but the first call instance that occurs will once again disable the ability to record agent greetings.</p> <p>For telecommuter configurations, agent greetings are not supported.</p>
<p>I do not know how to stop the transmit and receive audio traffic?</p>	<p>Read the following items for the solution for your configuration:</p> <p>If the Service Link Mode: for this station is set to permanent, the transmission and receipt of audio over the network is only inactive when the agent first logs in. The first call that occurs on this station will cause the audio traffic to begin and remain active until the station is logged off of the <i>DEFINITY</i>[®] system.</p> <p>If the Service Link Mode: for this station is set to as-needed, the audio link will become inactive 10 seconds after release of a call.</p>
<p>Fatal errors occurring when the Call History window is opened.</p>	<p>This could be a sign that the IP Agent database is corrupt. To resolve this problem, uninstall IP Agent and reinstall. Any data stored in the database previous to this action is lost.</p>

Glossary

Abbreviated Dial Feature	Allows the agent to store selected telephone numbers for quicker and easier dialing. Each number can be a complete or partial telephone number, an extension number, or a trunk or feature code.
ACD	See Automatic Call Distribution.
Active Call	A call appearance state where the voice (talk) path between two parties has been connected; for example, a caller and an agent.
ACW	See After Call Work
Add/Remove Programs	A Windows feature that allows you to remove programs that have been installed on your computer. The Add/Remove icon is found in the Control Panel dialog box.
After Call Work (ACW)	An ACD agent work mode in which agents are unavailable to receive ACD calls. Agents should enter the ACW mode to wrap-up call-related work before the next ACD call is delivered.
Agent	A person who receives calls that are directed to a split or skill.
Agent Information Panel	This panel is displayed when there are no calls and there is status information. If the agent is logged in, the status information also includes the agent mode (for example, Auto-In and Manual-In).
Agent Mode	The agent skill set associated with your EAS agent ID. To use IP Agent, you need to log into agent mode in order to receive ACD (Automatic Call Distribution) calls. Logging into agent mode makes the Agent toolbar available for your use.
Agent Skill	An attribute that is associated with an EAS 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 20 skills. The meaning of each Agent Skill is defined by the customer. Examples of what could be considered skills are: the ability to speak a particular language or the expertise to handle a certain product.
Agent State	A feature of agent call handling. Agent states are the different call work modes and call states an agent can be in (logins, logouts, After Call Work, AUX, and so forth). Data about these states is displayed in the history log.
Agent Toolbar	A toolbar that provides buttons for agent login and logout and agent modes, such as Auto-In, Manual-In, and After Call Work.

Application Folder

Application Folder	A folder on the network server that holds IP Agent application software-executable files and components.
Assist	Allows an agent to request assistance (whether on an active ACD call or not) from the split or skill supervisor by pressing the Assist button or by putting the call on hold and dialing the Assist feature access code, followed by the split group number. The agent must be logged into the split.
Auto Dial	A modem feature that opens the line and dials the telephone number of another computer to establish connection.
Auto-In	An ACD work mode. In the Auto-In mode, when an agent disconnects from a call, he or she is automatically available to receive another ACD call.
Automatic Call Distribution (ACD)	A method of call distribution where EAS agents are placed called "skills." An EAS agent can be logged into up to 20 skills simultaneously. For each skill, EAS distributes calls to the agents' voice terminals by using one of two call distribution methods: UCD or Expert Agent Distribution (EAD).
AutoPlay	A Microsoft <i>Windows</i> [®] 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.
AUX	See Auxiliary Work.
AUX RC	See Auxiliary Reason Code.
Auxiliary Reason Code (AUX RC)	An EAS feature that enables a call center to track an agent's time more precisely when the agent is in the AUX state. A customer-defined numeric code that describes the reason for entering the AUX work state, such as lunch or meetings.
Auxiliary Work (AUX)Mode	An ACD agent work mode indicating the agent is unavailable (for example, on break or in training) to receive an ACD call.
Available	An agent state in which the extension is able to accept an ACD call. This is a substate of Auto-In and Manual-In mode.
Basic Conference	Allows an agent to add parties to a call (up to five parties can be added, for a total of six on the call). The agent selects Conference, dials the number, talks to the party, and selects Conference again. See <i>also</i> Enhanced Conference.
Basic Transfer	A transfer option that lets the agent send the present call to another phone number or extension. The agent remains on the line until the call is answered and announces the call if desired. See <i>also</i> Enhanced Transfer and Unsupervised Transfer.
Call Appearance	The call appearance is an IP Agent graphical control that provides the agent with a Call Information Panel and a Phone Display area. See Call Information Panel and Phone Display.

Call Information Panel	The Call Information Panel (CIP) is a single panel (40-character display) that provides information about a single call, such as name, call duration, status icon, and control buttons (for example, Answer/Release and Reconnect).
Call Park	To park a call for retrieval at any extension.
Call Pickup	To answer a call to a member of your pickup group when your voice terminal is idle.
Call Prompting	A switch feature that routes incoming calls based on information entered by the calling party, such as an account number. The caller is prompted to select an option from those listed in an announcement.
Connected	A trunk state in which a caller and an agent are connected on an ACD call.
Cut-Through Dialing	As a digit is entered, it is immediately dialed (as on a telephone). Cut-through dialing is provided using the Dial Pad or by entering digits from the keyboard when focus is not on the Number text box.
DDE	See Dynamic Data Exchange.
DEFINITY® ECS	<i>DEFINITY®</i> Enterprise Communications Server. The <i>DEFINITY®</i> ECS is a telecommunications system that routes voice and data information between various endpoints (for example, telephones, terminals, and computers), provides highly robust networking capabilities, includes an extensive set of standard features (for example, Attendant Consoles, Voice Processing Interface, Call Coverage, DS1/E1 Connectivity, Hospitality Support, Recorded Announcement, and Trunk-to-Trunk Transfer), and provides flexibility. It also allows for the addition of optional features and upgrades to the system as business needs change.
DEFINITY® IP Softphone	<i>DEFINITY®</i> IP Softphone enables agents to log into their company's <i>DEFINITY®</i> server remotely and make and receive telephone calls from their telephone extensions.
Delimited Text File	A file containing values separated by commas, tabs, semicolons, or other characters.
Dial Area	A frame located on the CentreVu IP Agent main window that provides dialing capabilities.
Dial Pad	A toolbar that displays the 12 characters that are on the telephone dialpad. The 12 buttons are used to dial a number. Each character clicked is automatically sent. This is called cut-through dialing.
Dial Number Button	A button (telephone icon) on the Dial Number toolbar that is used to get a dial tone (for cut-through dialing) or to dial the digits entered in the Number text box (senderized dialing).

Dial Number Toolbar

Dial Number Toolbar	A toolbar that provides a number text box access to the phone directory, call history, speed dial, and recent calls list. When an agent enters a string (for example, <i>lan</i>) followed by Enter, a popup menu displays with a list of the directory entries that start with that string. If the first character of the number is a letter, the title of the field will be changed from Number to Directory.
DNS	See Domain Naming System.
Domain	A subnetwork comprised of a group of clients and servers under the control of one security database.
Domain Naming System (DNS)	Software that lets users locate computers on the Internet by host name. The DNS server maintains a database of host names and IP addresses.
Drop	Allows you to disconnect from an ACD call or non-ACD call. Drop disconnects you from a call and gives you a dial tone. Use Drop when you want to disconnect from a call and place another call. You can also use Drop to disconnect the last person added to a conference call.
Dynamic Data Exchange (DDE)	A message protocol in Windows that allows application programs to request and exchange data between them automatically.
EAS	See Expert Agent Selection.
Enhanced Conference	Allows you to add parties (up to six) to a call. You select Conference, type the number to be called into a text box, and click OK. After talking to the party, you can either click Yes to add the party or No to not add the party to the call. See also Basic Conference.
Enhanced Transfer	A transfer option that lets you send the present call to another phone number or extension. You select Conference, type the number to be called into a text box, and click OK. You are provided with an "Transfer the party?" text box in which you can select Yes to transfer the party or No to not transfer the party. See <i>also</i> Basic Transfer and Unsupervised Transfer.
Eurofont	A font set provided in DCP terminals that contains characters with diacritical marks common to other languages. Eurofont includes characters from the Russian, Greek, Baltic Rim, and central European languages, as well as the first 127 characters of the standard ANSI table. The True Type Font encoding used for Eurofont is non-standard relative to the encoding used in other Windows fonts. As a result, IP Agent is able to support Eurofont characters in the displays received from the DEFINITY ECS.
Expert Agent Selection (EAS)	An optional DEFINITY ECS feature that builds on the power of the Call Vectoring and ACD features of the DEFINITY ECS to match skills required to handle a particular call to an agent who has at least one of the skills that a caller requires. Agents are assigned a single set of work mode buttons, rather than one set per split.

FAC	See Feature Access Code.
Feature Access Code (FAC)	A 1-to-4 digit number with an optional leading * or # that is assigned in DEFINITY ECS administration to invoke features. For example, *81 may invoke Service Observing Listen Only. FACs require an available call appearance with dial tone before the FAC can be sent to the DEFINITY ECS. Assigned FACs may not be available to all users on DEFINITY ECS based on his/her class of restrictions and/or whether the feature has been enabled in the DEFINITY ECS.
Feature Button	A button placed on the main window that can be assigned to any one of a number of DEFINITY ECS features that could be assigned to a physical extension's button during station administration.
Graphical User Interface (GUI)	This is a picture based, rather than command-line based, interaction between the user and the computer.
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).
GUI	See Graphical User Interface.
Hold	Allows an agent to disconnect from a call temporarily, use the toolbar for other call purposes, and then return to the original call.
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	HTML. A standard for defining documents with hypertext links. See also <i>Hypertext</i> .
Installation Folder	A folder on the network that holds all of the IP Agent files. <i>Setup.exe</i> is run from this folder to install IP Agent on each computer.
Internet Protocol Address (IP Address)	Each computer has its own unique IP address which is an identifier used for communicating across a network.
IP Address	See Internet Protocol Address.
Kanafont	A font set provided in DCP terminals that contains Katakana characters (used in Japanese language) as well as the first 127 characters of the standard ANSI table. The True Type Font encoding is non-standard relative to the encoding used on other DEFINITY fonts. As a result, IP Agent is able to support Katakana characters in displays received from the DEFINITY ECS.

LAN	
LAN	See Local Area Network.
Local Area Network (LAN)	A private interactive communication network that allows computers to communicate over short distances at high data transfer rates.
Log	A file that contains a record of computer activity as well as backup and recovery data.
Login	Allows an agent to log into the DEFINITY ECS so that the agent can receive ACD calls. Non-EAS agents may log in to a maximum of four splits at once. EAS agents can be logged into as many as 20 skills simultaneously.
Login ID	A login number and that allows an EAS agent to log into agent mode and the skills associated with that mode on the switch.
Logout	Allows you to log out of the DEFINITY ECS. When the you out of the DEFINITY ECS, you cannot receive ACD calls. If you are an EAS agent, you may be requested to enter a reason code before logging out.
Manual-In	An ACD work mode. In the Manual-In mode, the agent automatically enters the ACW mode when he or she disconnects from an ACD call. To become available to receive another ACD call, the agent must manually enter the Auto-In or Manual-In mode.
Network Server	A computer in a network shared by multiple users.
Off-Hook	Off-hook means that the voice path to your telephone is fully functional.
On-Hook	On-hook means that the voice path to your telephone is turned off.
Phone Display	A 40-character display that is located under the Call Information Panel of your CentreVu IP Agent callbar. This display area receives information from the DEFINITY ECS so that you can see call and non-call related information, such as call prompting digits and VuStats from the DEFINITY ECS.
PSTN	See Public Switched Telephone Network.
Public Switched Telephone Network (PSTN)	The worldwide voice telephone network.
RC	See Reason Code.
Readme File	A file that provides the latest information on a newly released product; in this case, CentreVu IP Agent.
Read-only	A folder or file that can be read, but not updated or erased.

Reason Code (RC)	A customer-defined numeric code that describes the reason for entering the AUX work state or for logging out of the system.
Registry	The system-wide depository of information supported by Windows. The registry contains information about the system and its applications, including clients and servers.
Release	Allows you to release an ACD call.
Screen Pop	The ability to automatically display information from other sources, such as databases or Web pages based on an IP Agent triggering criteria.
Send All Calls	To send all incoming calls (except priority, intercom, and personal central office calls) immediately to an assigned extension, AUDIX, or message center for coverage.
Senderized Dialing	When a dial string is entered, the Send Digits button or Enter key must be selected to actually dial the digits. This type of dialing allows for editing of dial strings before sending the digits.
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 that requires one of those skills.
Softphone	A software application that enables you to control telephone calls (both incoming and outgoing) directly from your computer.
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.
Stroke Counts	Allows an agent to record the number of times a particular customer-related event occurs. For example, an agent may be asked to press a button each time a customer requests information about a particular item. Stroke Count entries are numbered from 1 through 9. Each number is assigned to a specific item, and the agent enters that number (1–Stroke through 9–Stroke) whenever a customer asks about that item.
Switch	A private switching system providing voice-only or voice and data communications services including access to public and private networks) for a group of terminals within a customer's premises.
TAPI Assisted Dialing	IP Agent supports telephony enabled applications such as Microsoft Scheduler. This support provides the ability for telephony enabled Windows applications to originate a call and have the call reflected in the IP agent application.
Toolbar	A row of buttons used to activate various functions of the IP Agent application. The IP Agent main window can contain as many as five toolbars.

ToolTips

ToolTips Brief descriptions that display when the mouse pointer is over a toolbar button.

Unsupervised Transfer A call transfer option that lets an agent send the present call to another phone number or extension. The agent selects Transfer, types the number to be called into a text box, and clicks OK to transfer the call. The agent does not talk to the party receiving the transferred call. *See a/so* Basic Transfer and Enhanced Transfer.

VDN of Origin Announcement (VOA) A short announcement that is assigned to a VDN through switch administration. The VOA identifies the origin or purpose of a call for the call center agent who answers the call.

VOA See VDN of Origin Announcement.

Voice Terminal A telephone equipped with specifically designed features (for example, the Conference or Hold button or Message light) and functional capabilities that distinguish it from a conventional telephone.

VuStats Information such as agent, split/skill, VDN, or trunk group data.

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