Lucent Technologies
Bell Labs Innovations

CentreVu™ Supervisor
Version 5.0

User Guide

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Table of Contents

CentreVu Supervisor

1

Introduction

About *CentreVu*™ Supervisor

The Lucent Technologies *CentreVu* Supervisor (Supervisor) software is a PC-based interface to the *CentreVu* Call Management System (CMS). The Supervisor software runs on any *IBM*[*] compatible PC that is running any of the following *Microsoft*[†] operating systems:

- *Windows*[‡] 95
- *Windows* NT 4.0
- *Windows* 3.1
- *Windows* for Workgroups 3.11
- *Windows* NT 3.51.

Supervisor is a client/server application. The "client" is the PC on which you are running the Supervisor application. The "server" is the CMS machine where the CMS database is located.

The CMS is a software product used by customers who have Lucent Technologies telecommunication switches and receive a large volume of telephone calls that are processed through the Automatic Call Distribution (ACD) feature of the switch. The CMS collects call-traffic data, formats management reports, and provides an administrative interface to the ACD feature in the switch.

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* IBM is a registered trademark of International Business Machines Corp.
† Microsoft is a registered trademark of Microsoft Corp.
‡ Windows is a registered trademark of Microsoft Corp.

When to Use *CentreVu* Supervisor

You can use Supervisor to access and run the following CMS functions:

- Reports
- Dictionary
- Exceptions
- ACD Administration
- CMS System Setup
- Maintenance
- User Permissions
- Existing CMS Custom Reports
- Designer Reports (if Report Designer has been purchased).

In addition to giving you access to the CMS, Supervisor has many features, such as Report Designer and Bookmarks, that are not available when accessing CMS through a terminal. See the “Supervisor Features” section in this chapter for an outline of the features specific to Supervisor.

Some of the CMS functions, such as Vector Contents and Timetable, are not available in Supervisor. You will use the *CentreVu* Terminal Emulator on your PC or a terminal to use those features. For more information, see the “When to Use *CentreVu* Terminal Emulator” section in this chapter and Chapter 18, “*CentreVu* Terminal Emulator.”

Instead of the Custom Reports feature of the CMS, Supervisor has a report creation and editing tool, which is called the Report Designer. For more information on how to use the Report Designer, refer to the *CentreVu Supervisor Report Designer* (585-215-831) document and on-line help.

Supervisor Features

Supervisor uses *Windows* capabilities to access the following features:

- The **Controller** — accesses CMS features (instead of a hierarchical MainMenu as in the terminal interface to CMS). The Controller includes the following features:
  - — A toolbar for one-click access to other program features of the Supervisor application. The toolbar has buttons that access the CMS features (Reports, Dictionary, Exceptions, ACD Administration, CMS System Setup, Maintenance, and User Permissions). The toolbar can also be customized to give you one-click access to the CMS reports and operations that you use on a regular basis.
  - — A menu bar with menus that access the CMS features (Reports, Dictionary, Exceptions, ACD Administration, System Setup, Maintenance, and User Permissions) and Supervisor features (Options, adding and deleting toolbar buttons, Login/Logout, and Help)
  - — A status bar, which displays the status of the CMS server and gives brief descriptions of each toolbar button.
  - — Tooltips, which are brief descriptions that display when the mouse pointer is over a toolbar button.
  - — Indicators for CMS server date and time, ACD link status, and login/logout status.
- Use of the *Windows* 95 **system tray** — When the Supervisor application is running in *Windows* 95, the Supervisor icon resides in the system tray. If you are using report threshold highlights, the system tray icon changes when a Caution or Warning threshold is met. Also, the system tray icon gives you access to all of the Supervisor windows that you have open at any one time. See the “Using the System Tray Icon” section in Chapter 2, “Supervisor Basics,” for more information on this feature.
- **Bookmarks —** easily accesses reports and operations that you run on a regular basis. For more information on using the Bookmarks feature, see Chapter 14, “Bookmarks.”

- **Threshold highlights** — and notification on real-time reports. The threshold highlighting includes the following features:
  - — Color-coded highlighting in reports when user-specified thresholds are reached or exceeded
  - — Icon changes for threshold alerting notification while a report window is minimized (*Windows* for Workgroups 3.11 only)
  - — Notification in the *Windows* 95 system tray when a threshold Warning or Caution condition has been met.

  For more information on Threshold highlighting, see Chapter 5, "Reports."

- The ability to **export real-time, historical, and exception data** to the *Windows* clipboard or to a file — exported information can then be imported to any application that runs on *Windows*, such as a spreadsheet application. For more information on exporting report data, see Chapter 4, "Reports Basics."

- A set of standard **PC-based reports** — features graphical representations of data, such as pie charts and three-dimensional bar charts. For more information on graphical reports, see Chapter 4, "Reports Basics," Chapter 5, "Reports," Chapter 15, "Real-Time Reports," Chapter 16, "Historical Reports," and Chapter 17, "Integrated Reports."

- New "**Integrated" reports** — combine real-time data and historical data into one report. You will find these reports especially useful for looking at cumulative data throughout one day. For more information on integrated reports, see Chapter 4, "Reports Basics," Chapter 5, "Reports," and Chapter 17, "Integrated Reports."

- New **"drill-down" report** capabilities — let you quickly access, from a report that is currently running, detailed information on a specific agent or on all of the agents in a particular work state for a split/skill. You can access the drill-down information by double clicking on an agent name or login ID or work state (depending on which information you are interested), or by selecting the drill-down report from the right mouse button menu. For more information on the drill-down report capabilities, see Chapter 5, "Reports."

- A **report manager —** gives you access to Properties information about each report, lets you copy standard reports so they can be edited in the Report Designer, and lets you copy designer reports to diskette for easy transportation to another CMS in your business. For more information on the report manager, see Chapter 5, "Reports."
- **ACD Administration** — including the following features:
  - — Moving extensions between splits using the *Windows* drag-and-drop capability.
  - — Moving agents between skills using the *Windows* drag-and-drop capability.
  - — Adding and deleting agents' skills.
  - — Changing agent splits/skills from within a report.

  For more information on the Supervisor ACD Administration features, see Chapter 8, "ACD Administration."
- User-controlled **real-time sorting of report data** — For more information on sorting report data, see Chapter 5, "Reports."
- **Network and direct-connect printing capabilities** — Supervisor can connect to the CMS through a local area network (LAN). The LAN connectivity allows you to print reports on any network printer accessible by your PC. Supervisor also allows you to print on printers that are connected directly to your PC.
- **LAN connectivity and modem connectivity** — to the CMS server. Supervisor allows you to connect to the CMS server across a LAN or using a modem. For more information on setting up your connectivity, see Chapter 12, "Options."

When to Use *CentreVu* Terminal Emulator

When you use Supervisor, there are specific CMS capabilities that you cannot access. In order to access these capabilities, you need to use the *CentreVu* Terminal Emulator or another terminal to access the CMS server. The *CentreVu* Terminal Emulator is a separate application that is included in the Supervisor installation. The following CMS capabilities are accessed through Terminal Emulator or another terminal:

- Forecast
- Shortcuts (in Supervisor, Bookmarks are used instead of Shortcuts)
- Timetables
- ACD Administration — Vector Contents
- CMS Administration and CMS Services login capabilities
- *UNIX** system command capabilities
- *INFORMIX*† database commands.

Note To learn how to use *CentreVu* Terminal Emulator, refer to Chapter 18, "*CentreVu* Terminal Emulator."

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Contents of This Document

This book describes what you need to know to use the Supervisor application on a day-to-day basis. The book is organized as follows:

- **Chapter 1, Introduction** — gives you background information on the Supervisor application and general information about the User Guide.
- **Chapter 2, Supervisor Basics** — walks you through starting Supervisor, logging into a CMS server, logging out of a CMS server, and exiting Supervisor. Also describes the Controller in detail, teaches you how to use the system tray icon, and teaches you how to complete input windows and close windows.
- **Chapter 3, Operations Basics** — defines how to use windows that display as a result of selecting an item from any Operations tab, including detailed information on the Actions menu items in operations input windows.
- **Chapter 4, Reports Basics** — defines how reports are displayed in Supervisor and teaches you how to format and print reports, including selecting run dates and times. Also gives detailed information on the Actions menu items available in report output windows and teaches you how to export report information to another *Windows* application.
- **Chapter 5, Reports** — teaches you how to run a historical, real-time, or integrated report including changing agent splits/skills from within a report, setting report threshold highlights, and using the drill-down capabilities of Supervisor.
- **Chapter 6, Dictionary** — teaches you how to use the **Dictionary** command and gives information on performing Supervisor tasks that are specific to this command including naming entities in the **Dictionary**, creating agent groups, and deleting agents from an agent group.
- **Chapter 7, Exceptions** — teaches you how to use the **Exceptions** command and gives information on performing Supervisor tasks that are specific to this command, including setting exceptions.

- **Chapter 8, ACD Administration** — teaches you how to use the **ACD Administration** command and gives information on performing Supervisor tasks that are specific to this command including activating agent traces, working with Call Work Codes, changing agent splits/skills, moving agents/extensions, setting up call profiles, and changing trunk group and VDN assignments.
- **Chapter 9, CMS System Setup** — teaches you how to use the **CMS System Setup** tool.
- **Chapter 10, Maintenance** — teaches you how to use the **Maintenance** tool and gives information on performing Supervisor tasks that are specific to this command including running the Error Log report and performing data translations.
- **Chapter 11, User Permissions** — teaches you how to use the **User Permissions** tool and gives information on performing Supervisor tasks that are specific to this command including all the steps involved in setting up a new CMS user.
- **Chapter 12, Options** — teaches you how to use the **Options** tool and gives information on performing Supervisor tasks that are specific to this command, including using the General, Report Colors, Threshold Colors, and Name Format tabs to define how your report output displays.
- **Chapter 13, Editing the Toolbar**— teaches you how to customize your toolbar including reorganizing toolbar buttons and creating new toolbar buttons.
- **Chapter 14, Bookmarks** — describes the **Bookmarks** feature of Supervisor and teaches you how to use bookmarks in the product.
- **Chapter 15, Real-Time Report Descriptions** — gives an example of each of the Real-Time Supervisor reports.
- **Chapter 16, Historical Report Descriptions** — gives an example of each of the Historical Supervisor reports.
- **Chapter 17, Integrated Report Descriptions** — gives an example of each of the Integrated Supervisor reports.

- **Chapter 18, *CentreVu* Terminal** — gives you general information about the *CentreVu* Terminal application and teaches you how to set up the *CentreVu* Terminal to connect to the CMS server.
- **Chapter 19, Error Messages** — gives you information on error messages that you might receive from Supervisor and outlines basic troubleshooting procedures for the error messages.

Conventions Used in This Document

The following conventions are used in this book:

- This document assumes that you are familiar with your computer and the *Windows* operating system including standard window conventions, such as using the F1 key to activate Help.
- *Windows* 3.x refers to the following operating systems:
  - *Windows* 3.1
  - *Windows* for Workgroups 3.11
  - *Windows* NT 3.51.
- Unless the right mouse button is specified, use the left mouse button whenever you are instructed to click or select an item.
- Menu names and option names are shown in bold text. For example: Choose **Save** from the **File** menu.
- References to windows are capitalized. For example, Manual Login window.
- *Italics* are used to reference other documents, to reference file names, and to indicate trademarks.
- Sections and chapters that are referred to in text are shown in quotes. For example: See Chapter 1, “Introduction,” for an outline of the information in this book.
- A graphic of each Supervisor window is not included in this book. Graphics are provided to give you general information about a *type* of window or to help clarify a procedure that is being described. The examples in this book are taken from Supervisor running in *Windows* 95.
- The *DEFINITY*® Enterprise Communications Server is referred to as ECS. Earlier versions of this product are referred to as “switch” (for example, “… an ECS or switch without EAS”).

Chapter 1

Related Documents

The following documents include additional information about the CMS or Supervisor:

- *CentreVu™ Supervisor Version 5 User Guide* (585-215-829*)
- *CentreVu™ Supervisor Version 5 Installation and Getting Started* (585-215-830)
- *CentreVu™ Report Designer Version 5 User Guide* (585-215-831)
- *CentreVu™ Supervisor Version 5 Change Description* (585-215-832)
- *CentreVu™ CMS R3V5 Administration* (585-215-820)
- *CentreVu™ CMS R3V5 Real-Time and Historical Reports* (585-215-821)
- *CentreVu™ CMS R3V5 Custom Reports* (585-215-822)
- *CentreVu™ CMS R3V5 Change Description* (585-215-823)
- *CentreVu™ CMS R3V5 External Call History Interface* (585-215-824)
- *CentreVu™ CMS R3V5 Forecast* (585-215-825)
- *CentreVu™ CMS R3V5 Upgrades and Migration* (585-215-826)
- *CentreVu™ CMS R3V5 Sun SPARCserver Computers Installation and Maintenance* (585-215-827)
- *CentreVu™ CMS R3V5 Sun SPARCserver Computers Connectivity Diagram* (585-215-828).
- *CentreVu™ CMS R3V5 Real-Time and Historical Reports*, International Version (585-215-833†)

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*This document is also available in the following languages: French (FR), Dutch (NL), Japanese (JA), Portuguese (PTB), German (DE), and Columbian Spanish (ESC). A two- or three- letter code after the ordering number indicates the language of the document.
†This document is not available in English. A two- or three- letter code (see above) after the ordering number indicates the language of the document.

2

Supervisor Basics

Introduction

This chapter outlines the features of the Supervisor application and teaches you general procedures for using Supervisor.

The sections in this chapter are as follows:

- Starting Supervisor
- Logging Into the CMS Server
- Logging Off of the CMS Server
- Exiting Supervisor
- The Controller — Not Logged Into the CMS Server
- The Controller — Logged Into the CMS Server
- Using the System Tray Icon
- Using Supervisor Menus
- Using Supervisor Selector Windows
- Adding Bookmarks
- Completing Input Windows
- Completing Input Fields
- Using the Browse Buttons
- Using the History List
- Closing Supervisor Windows.

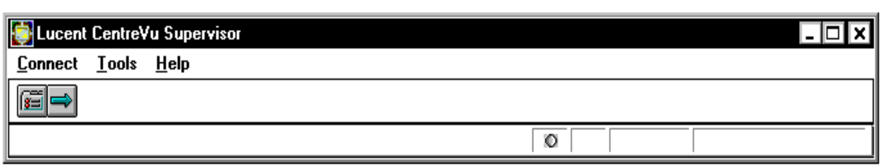
Starting Supervisor

Based on which version of *Windows** you are running, use the steps below to start the Supervisor application.

- For *Windows* 3.x:
  1. Double click on the **Lucent *CentreVu* Supervisor** Program Group.
  2. Double click on the ***CentreVu* Supervisor** icon .
- For *Windows* 95 and *Windows* NT 4.0:
  1. Select Start from the task bar.
  2. Select Programs from the Start menu.
  3. Select the **Lucent *CentreVu* Supervisor** program group.
  4. Select ***CentreVu* Supervisor** from the menu .

The Supervisor application opens and is running. The Controller (shown below) displays. Supervisor is now running, but you are not yet logged into the CMS server.

The Controller is the Supervisor main window. You will use the toolbar buttons and pull-down menus to access the CMS server. The following figure illustrates how the Controller appears before logging into the CMS server:



Note

See the "The Controller — Not Logged Into the CMS Server" and "The Controller — Logged Into the CMS Server" sections in this chapter for more information on using the Controller.

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*Windows is a registered trademark of Microsoft Corp.

Chapter 2

Logging Into the CMS Server

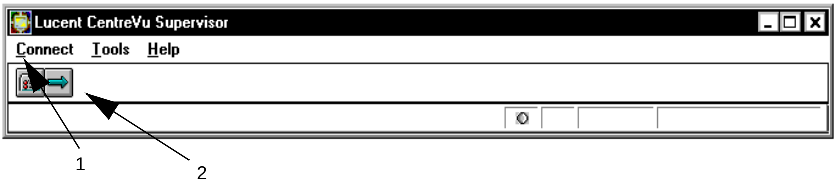
From the Supervisor Controller, you can connect to the CMS server in either of the following ways:

- **Automatically** — opens an input window in which you enter your login ID and password. Once you select OK, the connection to the CMS server is automatically started.

  Note If you use Automatic Login to connect to the CMS server and the connection is broken or dropped while you are logged into the server, Supervisor attempts to restore the connection.

- **Manually** — opens a login window that requires you to enter your login ID, your password, the terminal type, and then to manually log into CMS. Manual login is typically used for troubleshooting and for the CMS Services and CMS Administration login IDs.

You can use the **Connect** menu or the **Login** button to log into the CMS server.

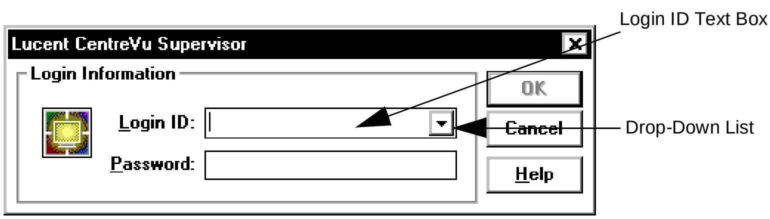


1. Connect Menu
2. Login Button

Automatic Login

To start the CMS server connection using the automatic login, do the following steps:

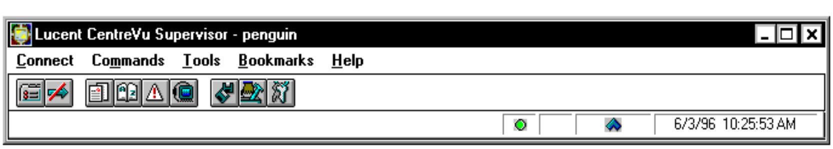
1. Select **Login** from the **Connect** menu, or click the Login button  on the toolbar.
2. The Login Information window appears:



3. Type your CMS login ID in the **Login ID:** text box, or select your login ID from the drop-down list.
4. Tab to the **Password:** text box.
5. Type your CMS password in the **Password:** text box.

   At this point, you may see the Confirm Password window. This window reports that your password has expired and must be changed. Follow the prompts and type in a new password.
6. Select OK.

   A message box indicates that Supervisor is connecting to the CMS server.
7. The Supervisor Controller displays. It now includes the **Commands** and **Bookmarks** menus and additional items, which relate to CMS, in the **Tools** menu.

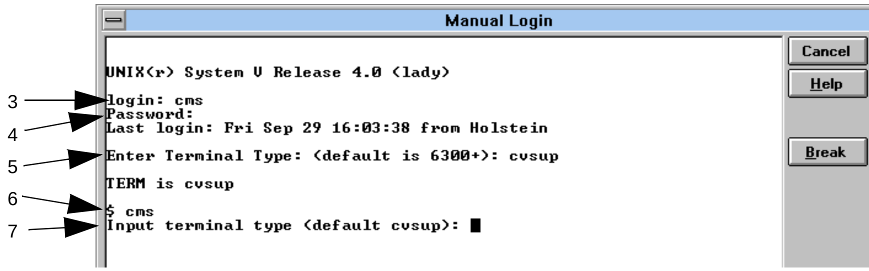


Note The buttons that appear on the toolbar and the menu items available in the **Commands** and **Tools** menus depend on how your CMS user permissions are set up.

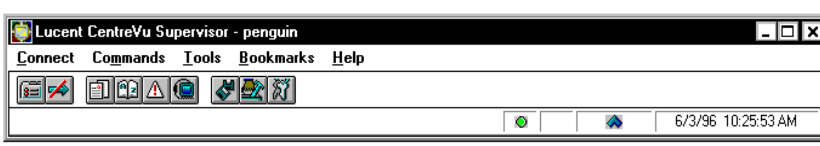
Manual Login

To start the CMS server connection using the manual login, do the following steps:

1. Select **Login** from the **Connect** menu, or click the Login button  on the toolbar.
2. The Manual Login window appears.



3. At the `login:` prompt, enter *your* CMS Login ID.
4. At the `Password:` prompt, enter your CMS password.
5. If the `Enter Terminal Type:` prompt displays, enter **`cvsup`**.
6. If the *UNIX** prompt displays, enter **`cms`**.
7. At the `Input Terminal Type:` prompt, confirm that the terminal type is **cvsup** and press Enter. If it does not default to **cvsup**, enter **cvsup**.
8. The Supervisor Controller displays. It now includes the **Connect**, **Commands**, **Tools**, **Bookmarks**, and **Help** menus.



Note The buttons that appear on the toolbar, and the menu items available in the **Commands** and **Tools** menus depend on how your CMS user permissions are set up.

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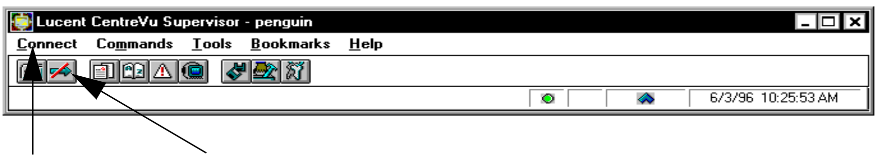
Logging Off of the CMS Server

To log off of the CMS server, do any of the following steps:

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



Connect Menu Logout Button

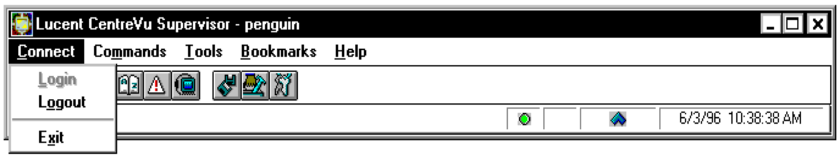
If you select the **Logout** button or select **Logout** from the **Connect** menu, the application responds with an “Are you sure you want to logout?” message. Select OK to log off of the CMS server, but keep the Supervisor application running.

If you select **Exit** from the **Connect** menu, the application responds with a “You are currently logged in. Are you sure you want to exit?” message. Select Yes to log off of the CMS server and to close the Supervisor application.

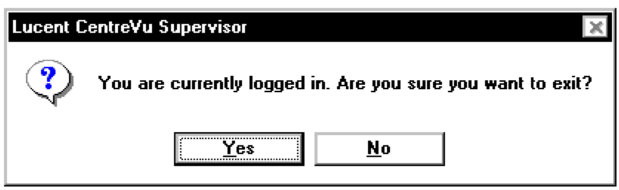
Exiting Supervisor

To exit from the Supervisor application, do the following steps:

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



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

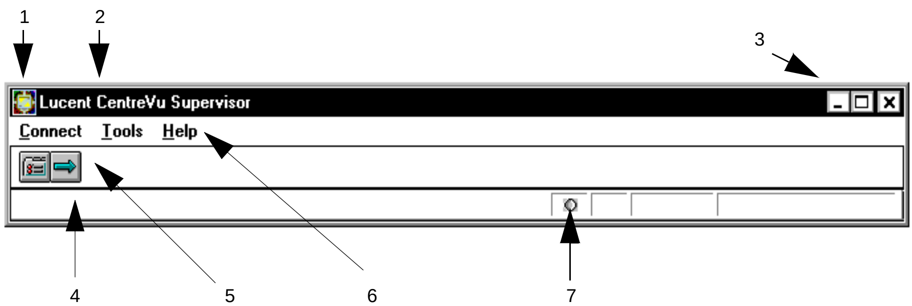


If you select Yes, Supervisor automatically logs you off of the CMS server and then exits from the application.

If you select No, you are returned to the Controller and remain logged into the CMS server.

The Controller — Not Logged Into the CMS Server

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



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

System Menu Box

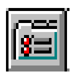
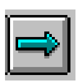
A common *Windows* convention. The system menu box allows you to perform common windows conventions, such as closing the current window or application.

Title Bar

A common *Windows* convention. The title bar shows the name of the application.

Toolbar

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

Button	Name	Command
	**Options**	Accesses the window needed to change your login options. See Chapter 10, “Options,” for more information.
	**Login**	Initiates a connection to the CMS server.

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

Maximize, Minimize, and Close Buttons

A common *Windows* convention. These buttons adjust the size of the window, or close the window.

Status Bar

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

Menu Bar

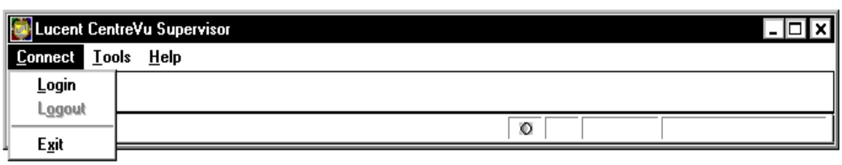
A common *Windows* convention. The menu bar lists the available drop-down menus. When you are not logged into the CMS server, the menu bar has the following menus available:

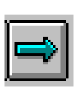
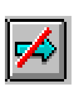
- **Connect**
- **Tools**
- **Help.**

The following sections outline the options available from each menu.

Connect

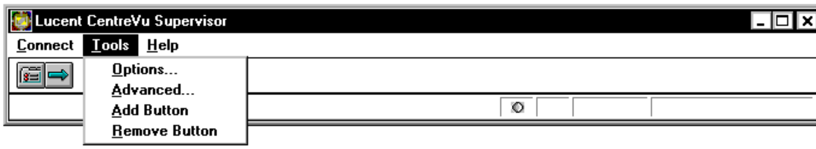
From this menu, you can initiate or discontinue a connection to the CMS server. The **Connect** menu, shown below has the following options:



Menu Item	Action
Login 	Selecting the **Login** from the **Connect** menu displays the Manual Login window if the Manual Login Option is set and displays item in the Automatic Login window if the Manual Login Option is not set.
Logout 	Selecting **Logout** from the **Connect** menu allows you to log out of the CMS server. This menu item is disabled because you are not currently logged into the CMS server.
Exit	Selecting **Exit** from the **Connect** menu closes the Supervisor application.

Tools

The **Tools** menu (shown below) has the following options:

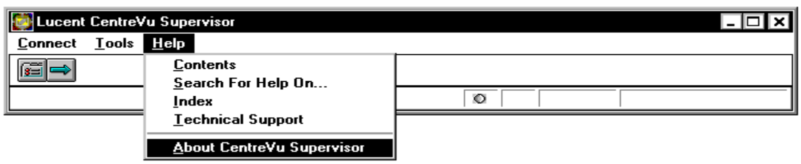


Menu Item	Action
Options... 	Selecting **Options** from the **Tools** menu or selecting the Options button on the toolbar, opens the **Options** window. When you are not logged into the CMS server, you can set standard Supervisor communications options in the Options window. The Communication and Modem tabs are available when you are not logged into the CMS server. For more information on the **Options** tool, see Chapter 12, "Options."
Advanced...	Selecting **Advanced...** from the **Tools** menu opens the Advanced window. This menu item is used for debugging purposes. Do not change the settings on the Advanced window unless you are instructed to do so by a Lucent Technologies associate.
Add Button...	Selecting the **Add Button** tool starts the Add Button wizard, which steps you through the process of creating a button and adding it to the toolbar. For more information on the **Add Button** tool, see Chapter 13, "Editing the Toolbar."
Remove Button...	Selecting the **Remove Button** tool displays a window that tells you how to remove a button from the toolbar.

Help

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

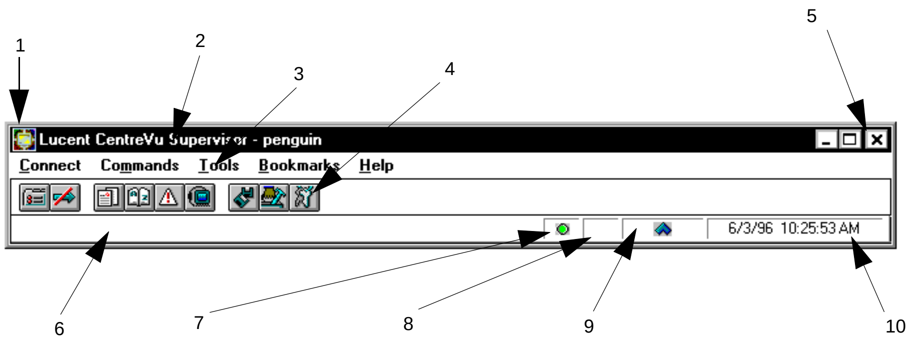
- **Pressing the F1 key** — displays help specific to the current window.
- **Selecting the Help button** (if available) — displays help specific to the current window.
- **Selecting Help from the menu bar** (shown below) — allows you to choose from the following options:



Menu Item	Action
Contents	Selecting **Contents** opens the Supervisor on-line help table of contents.
Search for Help On...	Selecting **Search** opens the Search window. Follow the instructions within this window to easily select specific help information on a given topic.
Index	Selecting **Index** opens a Supervisor help alphabetical index.
Technical Support	Selecting **Technical Support** opens a window that provides Technical Support information.
About...	Selecting **About** opens the Supervisor Help About window, which shows the software version number.

The Controller — Logged Into the CMS Server

This section details the Controller window as it appears when you are logged into to the CMS server. The following graphic shows the basic layout of the Supervisor Controller once you have logged into the CMS server.



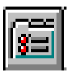
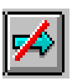
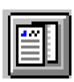
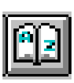
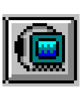
1. System Menu Box
2. Title Bar
3. Menu Bar
4. Toolbar
5. Maximize/Minimize Window Sizing Buttons
6. Status Bar
7. Login Status Indicator
8. Exception Count
9. ACD Status Indicators
10. Current CMS Date and Time

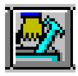
Note The System Menu Box, Title Bar, and Maximize / Minimize buttons are not defined below because they work the same when you are logged into the CMS server as they do when you are not logged into the server.

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

Toolbar

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

Button	Name	Command
	**Options**	Accesses the window needed to change your environment options. See Chapter 10, “Options,” for more information.
	**Logout**	Disconnects from the CMS server.
	**Reports**	Initiates the Reports command. See Chapter 5, “Reports,” for more information.
	**Dictionary**	Initiates the Dictionary command. See Chapter 6, “Dictionary,” for more information.
	**Exceptions**	Initiates the Exceptions command. See Chapter 8, “Exceptions.” for more information.
	**ACD Administration**	Initiates the ACD Administration command. See Chapter 9, “ACD Administration,” for more information.
	**CMS System Setup**	Initiates the CMS System Setup tool. See Chapter 12, “CMS System Setup,” for more information.

Button	Name	Command
	**Maintenance**	Initiates the Maintenance tool. See Chapter 13, “Maintenance,” for more information.
	**User Permissions**	Initiates the User Permissions tool. See Chapter 14, “User Permissions,” for more information.

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

Status Bar

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

- **Login Status Indicator** — shows a green light if you are connected to the CMS server, or shows a gray light if you are disconnected from the CMS server.
- **Exception Count** — gives you the current count of exceptions for all ACDs for which you have exception permissions. The exceptions count is cleared to zero at the beginning of the interval. For information on CMS exceptions, refer to the *CentreVu™ CMS Administration* (585-215-820) document.
- **ACD Status Indicators** — shows which ACDs are active/inactive. There can be up to four ACD icons showing, depending on how many ACDs this CMS supports. If the link to any one of the ACDs is down, the icon will be crossed out. If you place your mouse over the ACD Status Indicator, a tooltip will pop up and tell you the name of the current ACD.
- **Current Date and Time** — shows the current date and time of the CMS server you are logged into.

Menu Bar

A common *Windows* convention. The menu bar lists the available menus. When you are logged into the CMS server, there are four menus available on the menu bar:

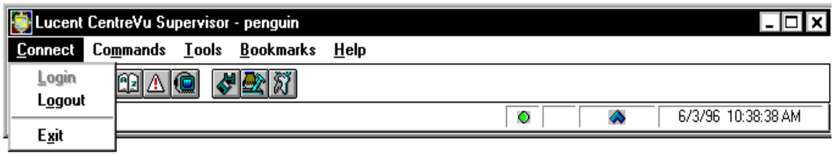
- **Connect**
- **Commands**
- **Tools**
- **Help**.

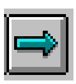
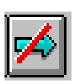
Note The **Commands** menu item is available only when you are logged into the CMS server. All of the options in the **Commands** menu are CMS-specific.

The following paragraphs outline the options available from each menu.

Connect

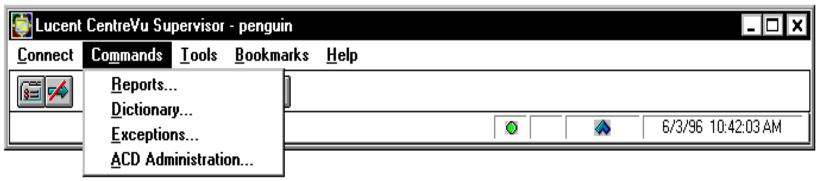
The **Connect** menu shown below has the following options:

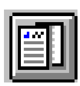


Menu Item	Action
Login 	When you select **Login** from the **Connect** menu, a login to the CMS server is started. This menu item is disabled when you are connected to the CMS server. This Login should not be confused with the login of any other application or network that you can perform on your PC.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

Commands

The **Commands** menu shown below gives you access to the Reports, Dictionary, Exceptions, and ACD Administration subsystems in CMS.



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

- Real-Time
- Historical
- Integrated.

Note Any Custom Reports you have created are ported to Supervisor. You can view and print the reports in Supervisor. To edit the reports, or create new ones, use the Terminal Emulator or a CMS terminal.

From the **Reports** command, you can view, print, and export data from all of the standard CMS reports, Custom CMS Reports, Supervisor Integrated and Graphical reports, and Report Designer reports.

Dictionary

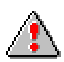
When you select **Dictionary** from the **Commands** menu or select the Dictionary button on the toolbar, the **Dictionary** selector window opens. You will see the following tabs to choose from:

- Operations
- Reports.

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

For more information on the **Dictionary** command, see Chapter 7, "Dictionary," in this book and refer to the *CentreVu™ CMS Administration* (585-215-820) document.

Exceptions



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

- Operations
- Reports.

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

For more information on the **Exceptions** command, see Chapter 8, "Exceptions," in this book and refer to the *CentreVu™ CMS Administration* (585-215-820) document.

ACD Administration

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

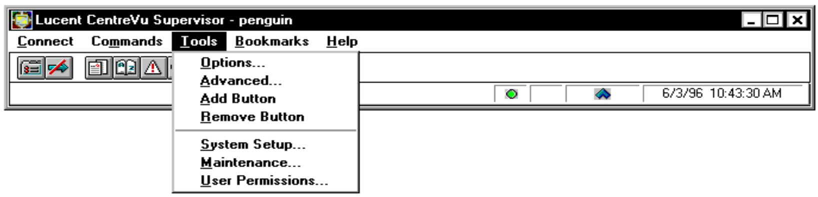
- Operations
- Reports.

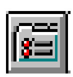
From the **ACD Administration** command, you can view, add, delete, or modify ACD-related parameters on the switch.

For more information on the **ACD Administration** command, see Chapter 9, “ACD Administration,” in this book and refer to the *CentreVu™ CMS Administration* (585-215-820) document.

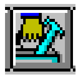
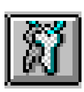
Tools

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



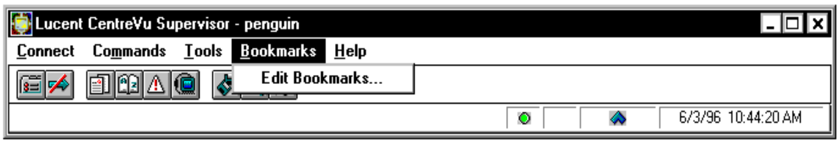
Menu Item	Action
Options... 	When you select **Options** from the **Tools** menu or select the Options button on the toolbar, the **Options** window opens. You can set standard Supervisor preferences in the Options window. You will see the following tabs to choose from: • General • Report Colors • Threshold Colors • Name Format. The Communications and Modems tabs are grayed-out because the Supervisor connection is already established. For more information on the **Options** tool, see Chapter 12, “Options.”
Advanced...	This menu item is used for debugging purposes. Do not change the settings on the Advanced window unless you are instructed to do so by a Lucent Technologies associate.

Menu Item	Action
Add Button...	Selecting the **Add Button...** tool starts the Add Button wizard, which steps you through the process of creating a button and adding it to the toolbar. For more information on the **Add Button...** tool, see Chapter 13, "Editing Your Toolbar."
Remove Button...	Selecting the **Remove Button** tool displays a window that tells you how to remove a button from the toolbar.
CMS System Setup 	When you select **CMS System Setup** from the **Tools** menu or select the CMS System Setup button on the toolbar, the **CMS System Setup** selector window opens. The only active tab in the **CMS System Setup** tool is the Operations tab. From **CMS System Setup** you can view and modify information relevant to how the CMS and switch were configured during installation. For more information on the **CMS System Setup** tool, see Chapter 12, "CMS System Setup," in this book and refer to the *CentreVu™ CMS Administration* (585-215-820) document.

Menu Item	Action
Maintenance 	When you select **Maintenance** from the **Tools** menu or select the Maintenance button on the toolbar, the **Maintenance** selector window opens. You will see the following tabs to choose from: • Operations • Reports. **Maintenance** is where you perform routine maintenance of the CMS, including backing up data, checking on the status of the connection to the switch, and scanning the error log. For more information on the **Maintenance** tool, see Chapter 10, "Maintenance," in this book and refer to the *CentreVu*™ *CMS Administration* (585-215-820) document.
User Permissions 	When you select **User Permissions** from the **Tools** menu or select the User Permissions button on the toolbar, the **User Permissions** selector window opens. The only active tab in the **User Permissions** tool is the Operations tab. **User Permissions** is where the CMS Administrator defines CMS user IDs and access capabilities each user will have. For more information on the **User Permissions** tool, see Chapter 11, "User Permissions," in this book and refer to the *CentreVu*™ *CMS Administration* (585-215-820) document.

Bookmarks

The **Bookmarks** menu gives you access to the **Edit Bookmarks** window and shortcuts to any operations or reports for which you have added bookmarks. The **Bookmarks** menu, prior to assigning any bookmarks, appears as follows:



Menu Item	Action
Edit Bookmarks	When you select **Edit Bookmarks** from the **Bookmarks** menu, the **Edit Bookmarks** window is opened. From the **Edit Bookmarks** window, you can view and rearrange the bookmarks you have assigned in Supervisor. For more information on **Bookmarks**, see Chapter 14, "Bookmarks.""
List of assigned bookmarks	When you select the Add Bookmark button on a selector window, the report or operation that was highlighted at the time is added to your list of available bookmarks. You can use the bookmarks list to bypass the selector window and go directly to the input window for the report or operation.

Help

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

Using the System Tray Icon

If you are running Supervisor with *Windows* 95 or *Windows* NT 4.0, the Supervisor icon resides in the system tray while the application is running.

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

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

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

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

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

You can control the sort order of the system tray icon menu and turn the feature on and off on the **Tools | Options** General tab. For more information, see Chapter 12, "Options."

Chapter 2

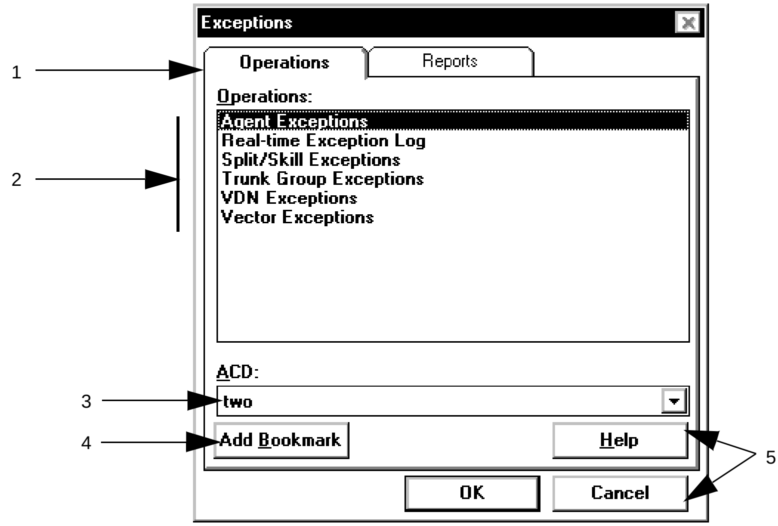
Using Supervisor Menus

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

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

Using Supervisor Selector Windows

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



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

Tab Folders

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

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

Available Windows

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

Current ACD

This text box shows the ACD that is currently selected.

Add Bookmarks Button

Bookmarks are tags you can use to easily access operations and reports you use often. To insert a bookmark on a report or operation, do the following steps:

1. Highlight the item in the selector box.
2. Select the Add Bookmark button.

For more information on using the Bookmarks feature of Supervisor, see Chapter 14, "Bookmarks."

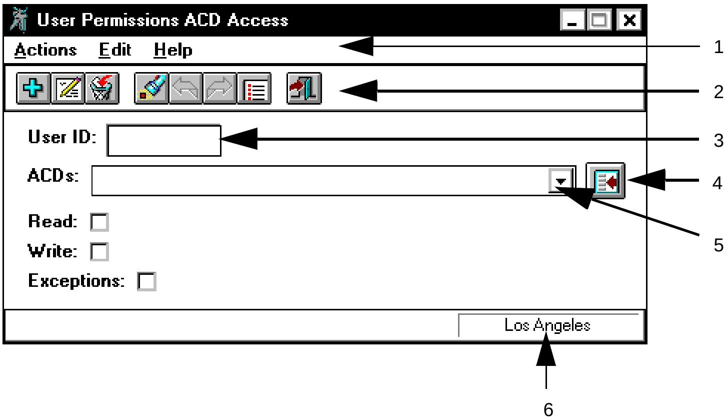
OK, Apply, Cancel, and Help Buttons

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

- **OK** — accepts the current input and continues to the next window.
- **Apply** — applies the current input, but does not continue to the next window.
- **Cancel** — cancels the current input and returns you to the previous window.
- **Help** — opens the help topic specific to this window.

Completing Input Windows

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



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

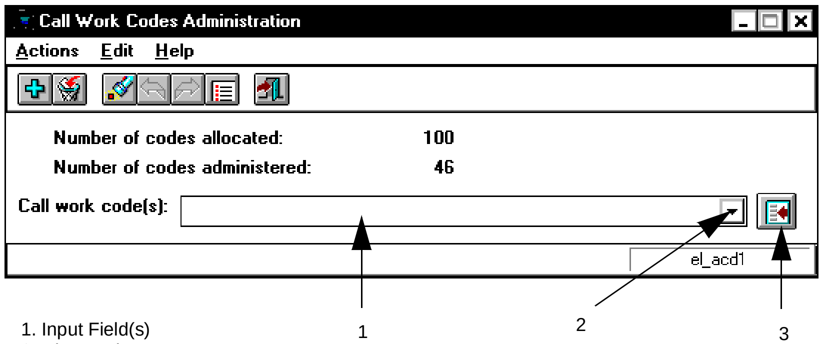
Chapter 2

Input windows have all or some of the following items:

- **Menu Bar** — includes menus for CMS **Actions** (Add, Delete, Find One, Next, Previous, List All, and Exit), **Edit** options (Cut, Copy, Paste, and Clear All), and Supervisor **Help**.
- **Toolbar Action Buttons** — let you perform CMS actions (Add, Delete, Find One, Next, Previous, List All, and Exit) by clicking on a button. See Chapter 3, "Operations Basics," for more information on the action buttons.
- **Input Fields** — text boxes where you type in the information needed to complete the CMS action.
- **History List** — displays a list of inputs you have previously used in the input field.
- **Browse Button** — lets you browse through all possible items for the input field. See the "Using the Browse Button" section in this chapter, and the "Selecting Report Run Dates" and "Selecting Report Run Times" sections in Chapter 4, "Reports Basics," for more information.
- **Current ACD** — displays the ACD on which you are working.

Completing Input Fields

Below is an example of an input window with the items related to completing input windows labeled.



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

You can complete an input field by doing one of the following actions:

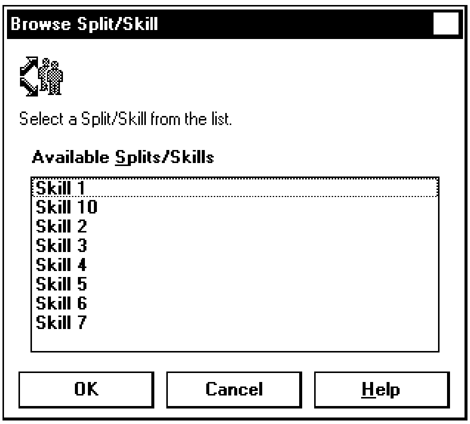
- **Type** in the information requested.
- Select the information from the **history list** of previously used items.

  During each CMS session, Supervisor recalls the items you have previously selected for each input field. If an input field has an associated history list, you can use the history list to select an item for the input field.
- Use the **Browse** button to view all available items for the input field, and then select an item(s) for the input field. See the “Using the Browse Button” section in this chapter, and the “Selecting Report Run Dates” and “Selecting Report Run Times” sections in Chapter 4, “Reports Basics,” for more information.

Using the Browse Button

When you select the Browse button, a window opens that lets you select items for the input field.

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

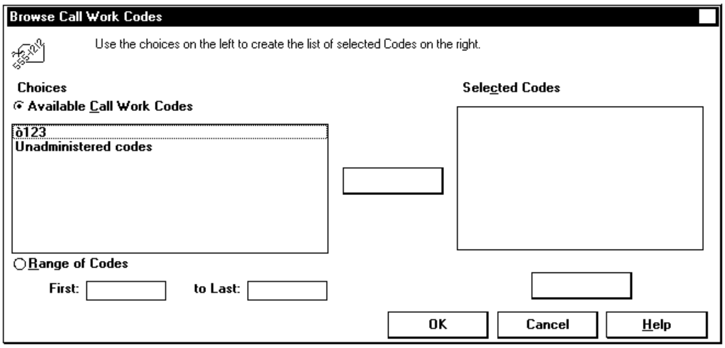


To use this window, do the following steps:

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

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

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



To use this window, do the following steps:

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

   You can select the entities individually or by selecting a range. To select a range, do the following steps:

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

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

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

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

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

2. Select **Add>>**.

Note You can use a combination of selecting entities from the Choices box and selecting a range of entity numbers.

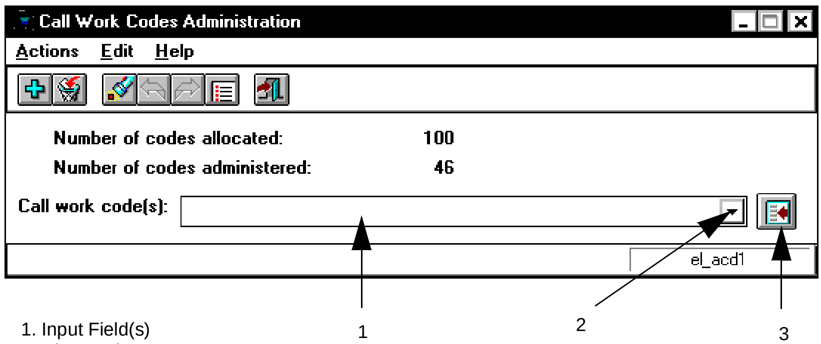
The entities that were highlighted in the Choices box are now listed in the Selected ... box.

3. Select OK.

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

Using the History List

To the left of each entity input field, there is a drop-down history list. The history list shows values you have previously entered in this field.



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

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

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

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

Closing Supervisor Windows

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

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

3

Operations Basics

Introduction

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

- **Commands | Dictionary**
- **Commands Exceptions**
- **Commands | ACD Administration**
- **Tools | CMS System Setup**
- **Tools | User Permissions**
- **Tools | Maintenance**.

Note

If information applies to a specific Operations tab (**Dictionary**, **Exceptions**, **ACD Administration**, **CMS System Setup**, **User Permissions**, or **Maintenance**), then that information is in the appropriate chapter. For instance, **ACD Administration** has several procedures specific to that command, so those procedures are located in the "ACD Administration" chapter.

No matter which command or tool you use to select an operation, how you perform the operation is the same. The information in this chapter teaches you about the menus and inputs you will find when performing CMS operations in Supervisor. The sections in the chapter are as follows:

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

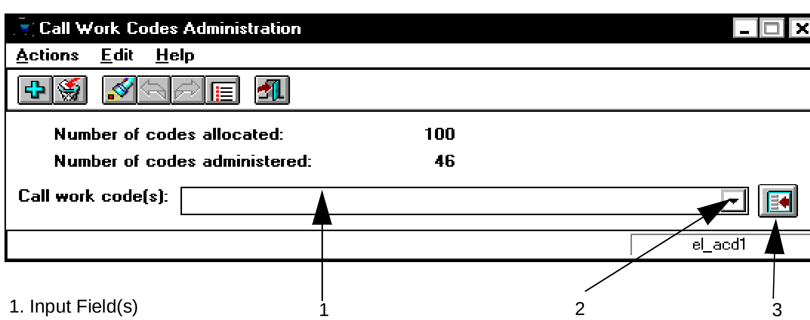
Running an Operation

To run an operation, do the following steps:

1. Select one of the following windows:
   - **Commands** | **Dictionary** Operations tab
   - **Commands** | **Exceptions** Operations tab
   - **Commands** | **ACD Administration** Operations tab
   - **Tools** | **CMS System Setup** Operations tab
   - **Tools** | **User Permissions** Operations tab
   - **Tools** | **Maintenance** Operations tab.
2. Select an operation from the Operations list box.
3. Select the ACD for which you want to perform the operation.
4. Select OK.

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

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



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

- Fill in the **input field**(s). Input fields are where you specify the information that you would like to view, add, modify, or delete.

  To complete the input fields, you can use any of the following methods:

  — Type in the name or number of the input requested.

  — Press the Browse button to view all of the available inputs.

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

- Ensure that the **correct ACD** is selected. The current ACD (selected on the Operations selector window) is displayed at the bottom of the input window.

  If you want to perform an operation for a different ACD than is currently selected, do the following steps:

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

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

  c. Change the ACD on the selector window.

  d. Select the operation you want to perform.

  e. Select OK.

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

6. Select OK.

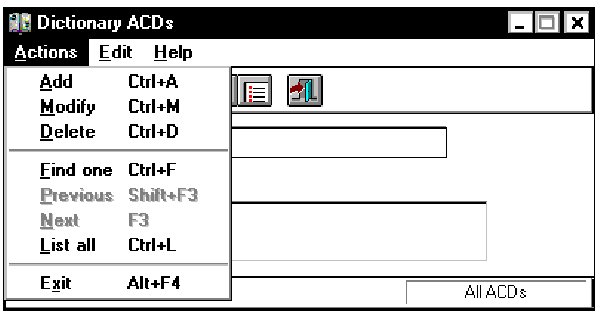
   The operation runs.

Operations Menus

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

Actions Menu

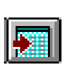
The **Actions** menu is found in the **Dictionary**, **Exceptions**, **Maintenance**, **CMS System Setup**, **User Permission**, and some **ACD Administration** operations windows. *Actions are used to perform CMS-related functions.* When the **Actions** menu item is available, the menu bar looks like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



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

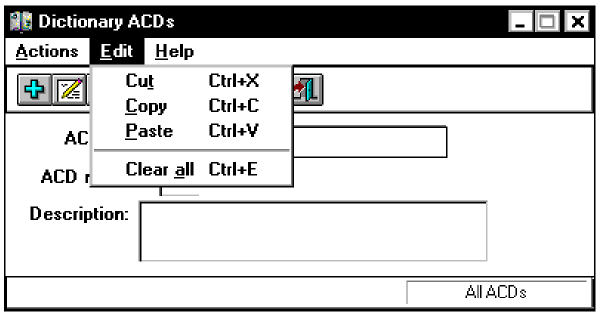
The following table lists the **Actions** menu items, their associated buttons, and a definition of each action. Not all of the actions will be available to you all of the time. If an action is not available in the current window, it is grayed-out on the **Actions** menu list and does not appear on the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

Chapter 3

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

Edit Menu

The **Edit** menu is found in the **Dictionary**, **Exceptions**, **Maintenance**, **CMS System Setup**, **User Permission**, and some **ACD Administration** operations windows. *Edit options are used to perform functions that are related to Microsoft[*] Windows*[†]. When the **Edit** menu item is available, the menu bar (and **Edit** menu) looks like this:



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

Menu Item	Shortcut	Action
Cut	Ctrl + X	A standard *Windows* feature that removes selected text and places it on the clipboard. This item is available on windows that have input fields.
Copy	Ctrl + C	A standard *Windows* feature that copies selected text to the clipboard. This item is available when text is selected in the window or the cell is selected in a List All window.

*Microsoft is a registered trademark of Microsoft Corporation.
†Windows is a registered trademark of Microsoft Corporation.

Menu Item	Shortcut	Action
Paste	Ctrl + V	A standard *Windows* feature that inserts a copy of the contents of the clipboard at the insertion point or replaces the selection (if any) with the text on the clipboard. This item is available only on windows that have input fields and when the clipboard is not empty.
Clear all	Ctrl + E	A feature that is available only on windows that have input fields. This menu item clears all of the values entered in the input fields. Option buttons are returned to the default value.

Adding Items to the CMS Database

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

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

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

Finding Items in the CMS Database

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

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

List All

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

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

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

   A list displays all of the items that exist on the CMS and match any criteria of the you entered on the input window displays.

Find one

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

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

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

   This is your find criteria.

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

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

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

Note For more information on List all and Find one, refer to the *CentreVu CMS Administration* (585-215-820) document.

Modifying Items in the CMS Database

Once you have selected an operation, an input window displays. You may want to modify the information for an item that already exists in the CMS (such as an agent group, a CMS user ID, or agent login IDs). To modify items from an operations input window, do the following steps:

1. Depending on the information you know about the entity to be modified, do one of the following actions:
   - If you know all or part of the specific information required for the input text boxes:
     a. Complete the text boxes for which you have information.
     b. Select **Find one** from the **Actions** menu, select the Find one button on the toolbar, or press Ctrl+F. The input window displays with the appropriate information.
   - If you do not know the specific information required for the input text boxes, do the following:
     a. Select **List all** from the **Actions** menu, select the List all button on the toolbar, or press Ctrl+L.
     b. Locate the information for the entity that you want to modify and note the relevant information.
     c. Close the List all window. The input window displays.
     d. Complete the text boxes for which you have information.
     e. Select **Find one** from the **Actions** menu, select the Find one button on the toolbar, or press Ctrl+F. The input window displays with the appropriate information.
2. Update the information in the text boxes.
3. Select **Modify** from the **Actions** menu, select the Modify button on the toolbar, or press Ctrl+M. If the **Modify** is successful, the status bar at the bottom of the window reads “Successful.” If you do not have the required write permissions to perform the **Modify** you attempted, the status bar reads “Failed” and an error message displays.

Deleting Items from the CMS Database

Once you have selected an operation from the Operations tab, an input window displays. You may want to delete an item that already exists in the CMS (such as an agent group, a CMS user ID, or agent login IDs). To delete items from an operations input window, do the following steps:

1. Depending on the information you know about the entity to be deleted, do one of the following:
   - If you know all or part of the specific information required for the input text boxes:
     a. Complete the text boxes for which you have information.
     b. Select **Find one** from the **Actions** menu, select the Find one button on the toolbar, or press Ctrl+F.

        The input window displays with the appropriate information.
   - If you do not know the specific information required for the input text boxes, do the following:
     a. Select **List all** from the **Actions** menu, select the List all button on the toolbar, or press Ctrl+L.
     b. Locate the information for the entity that you want to delete and note the relevant information.
     c. Close the List all window.

        The input window displays.
     d. Complete the text boxes for which you have information.
     e. Select **Find one** from the **Actions** menu, select the Find one button on the toolbar, or press Ctrl+F.

        The input window displays with the appropriate information.
2. Select **Delete** from the **Actions** menu, select the Delete button on the toolbar, or press Ctrl+D.

   Warning No warning message will display when you select Delete. The item you have specified for deletion from the CMS database will automatically be deleted.
3. If the delete is successfully completed, “Successful” displays in the status bar.

4

Reports Basics

Introduction

This chapter gives you general information about how to use Supervisor reports. You will find reports available under the following menus and tabs:

- **Commands** | **Reports** | Real-Time, Historical, or Integrated tab
- **Commands** | **Dictionary** | Reports tab
- **Commands** | **Exceptions** | Reports tab
- **Commands** | **ACD Administration** | Reports tab
- **Tools** | **Maintenance** | Reports tab.

Note Procedures that apply to reports that are located in a specific Command or Tool are located in the appropriate chapter. For instance, Threshold Highlights apply only to the **Reports** Real-Time and Integrated tabs, so the information regarding Threshold Highlights is located in Chapter 5, “Reports.” Likewise, **Exceptions** reports have specific procedures, which are located in Chapter 8, “Exceptions.”

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

No matter where you run a report from, the way you select, run, edit, and view a report is the same. The information in this chapter teaches you how to use all Supervisor reports. The sections are as follows:

- Running a Report
- Selecting Report Run Dates
- Selecting Report Run Times
- Report Menu Bar
- Report Layouts
- Formatting Grid Reports
- Formatting Chart Reports
- Minimizing Report Output Windows
- Right Mouse Button Pop-Up Menus
- Rotating a 3D Chart
- Exporting Reports
- Copying Chart Reports
- Resizing Report Windows
- Changing Column Widths
- Selecting a Printer
- Using Page Setup
- Exiting and Restarting Reports.

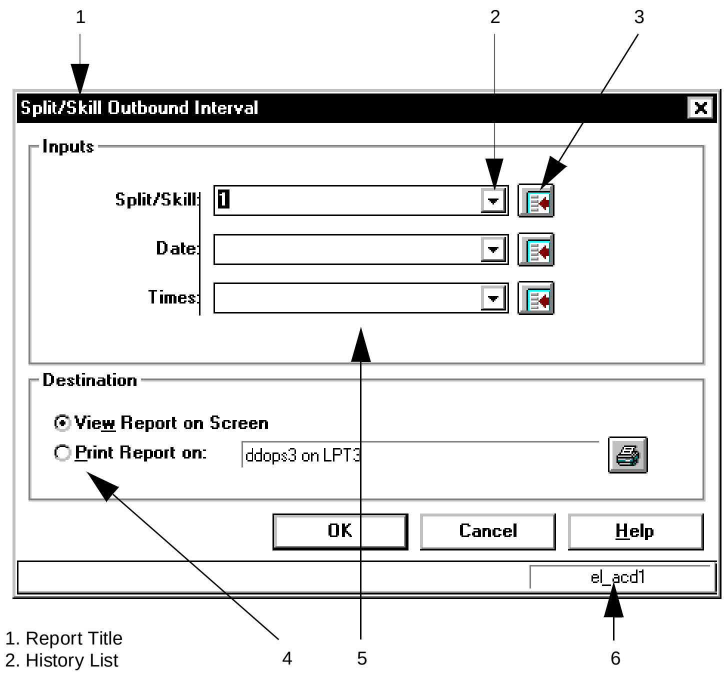
Running a Report

To run a CMS report, do the following steps:

1. Select one of the following windows:
   - **Commands** | **Reports** | Real-Time, Historical, or Integrated tab
   - **Commands** | **Dictionary** | Reports tab
   - **Commands** | **Exceptions** | Reports tab
   - **Commands** | **ACD Administration** | Reports tab
   - **Tools** | **Maintenance** | Reports tab
2. Select a report from the Reports list box.
3. Select the ACD for which you want to run the report.
4. Select OK.

   The report input window displays. The inputs required will vary, depending on which report you are running.
5. Complete the report input window.

The following example shows possible types of input that might be required to run a report.



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

- Fill in the **input field**(s). Input fields are where you specify the information you are running the report for.

  To complete the input fields, you can do any of the following steps:

  — Type in the name or number of the input requested.

  — Press the Browse button to view all of the available inputs.

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

- For all reports other than **Commands | Reports** Real-Time and Integrated tabs, select the **report destination**. Reports can be viewed on screen or printed to any printer your PC is connected to.

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

— Select the View Report on Screen destination

OR

— Select the Print Report on: destination and choose a printer (if you want to print on a printer other than the one displayed).

- Ensure that the **correct ACD** is selected. The current ACD (selected on the selector window) is displayed at the bottom of the input window.

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

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

  b. Go to the selector window you chose in step 1.

  c. Change the ACD on the selector window.

  d. Select the Report you want to run.

  e. Select OK.

6. Select OK.

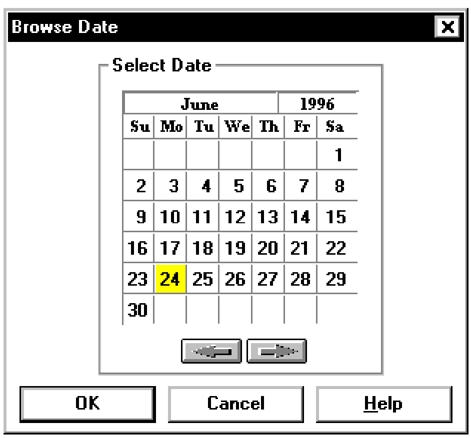
   The report runs.

Selecting Report Run Dates

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

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

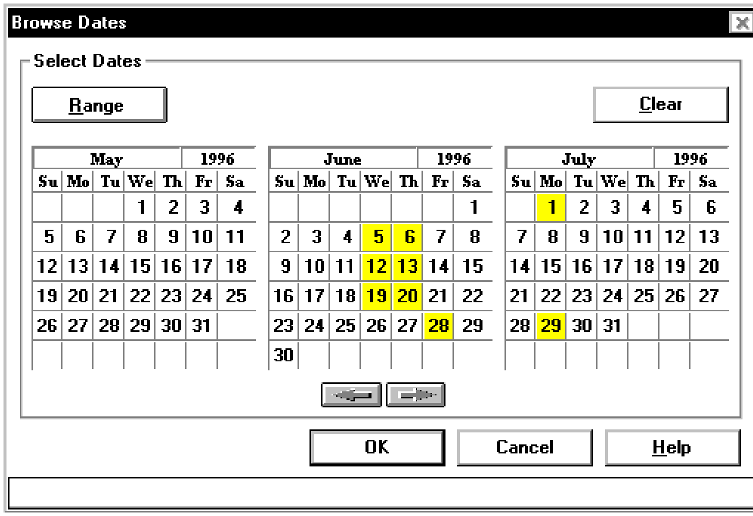
  — If you press the Browse button and the input needed is a single date, the following window displays:



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

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

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



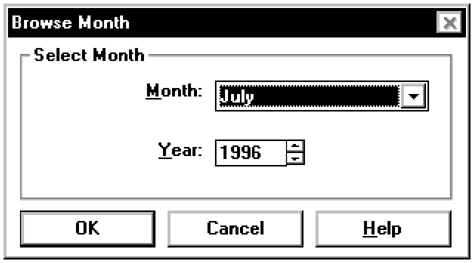
To select specific dates, use your mouse to point at a day and click. The day highlights. You can select as many days as you want.

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

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

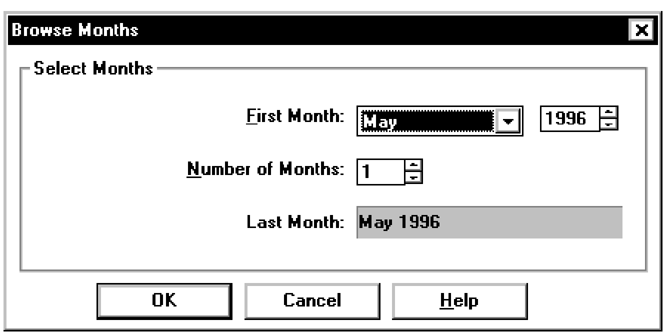
To clear your current selections, select Clear.

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



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

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



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

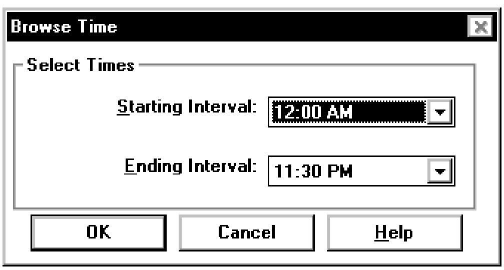
The months are in calendar order in the drop-down box, with the minimum date being January 1980 and the maximum date December 2055.

Selecting Report Run Times

When you run interval historical reports, you need to select the time period for which to run the report. To do this, do any of the following steps:

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

  If you select the browse button, the following window displays:



Complete the following fields:

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

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

Report Menu Bar

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

- Report
- Edit
- Format
- Tools
- Options
- Help.

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

Report

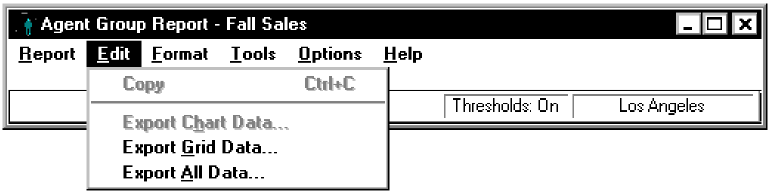
The **Report** menu has the following options that relate specifically to the report you are running.

Menu Item	Action
Restart	Closes the current report output window and displays the input window for the current report. This allows you to run the same report, changing inputs as needed. The **Restart** menu item will be grayed out if you are currently running a drill-down report.
Page Setup	Displays the Page Setup window. See the “Using Page Setup” section in this chapter for more information on Page Setup.
Print	Displays the Print window. See the “Selecting a Printer” section in this chapter for more information on the Print window. When you select **Print** from the **Report** menu, the report that is active will be printed according to the options you choose in the Print window. If the report is a real-time report, only one refresh of the report will be printed.

Menu Item	Action
Design	If you have purchased the Report Designer software and your CMS User ID is authorized to use the Report Designer, you can access the Report Designer Design Mode window from any report using this menu item. When you select Design from the Report menu, the report that is currently running remains visible, but you are placed in the Design Mode, where you can edit the report. For more information on the Design Mode, see the CentreVu Report Designer (585-215-831) book. The Design menu item will be grayed out if you are currently running a drill-down report.
Exit	Closes the active report output window. The location of the report output window is saved when the report is exited, and that is where the report will display the next time you run it.

Edit

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



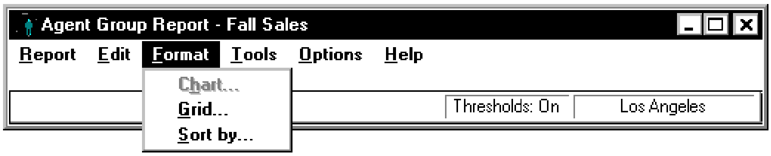
Menu Item	Action
Copy	The image of the currently selected chart is copied to the clipboard in *Windows* metafile format. This allows you to paste the chart picture into most *Windows* applications, such as a word processor. You can also access **Copy** from the right mouse button pop-up menu. See the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

*Microsoft is a registered trademark of Microsoft Corporation.
†Windows is a registered trademark of Microsoft Corporation.

Menu Item	Action
Export Grid Data	The Data Export Options window is shown to allow you to export the grid data. If the report is a real-time report, only one refresh of the data will be exported. You can also access the Data Export Options window from the right mouse button pop-up menu. If there is more than one grid on the report, this option will be grayed out until you select a grid. For more information on exporting data, see the “Exporting Reports” section in this chapter.
Export All Data	The Data Export Options window is shown to allow you to export all data in the report. You will also be allowed to include labels and headers in the data that are exported. If the report is a real-time report, only one refresh of the data will be exported. You can also access the Data Export Options window from the right mouse button pop-up menu. For more information on exporting data, see the “Exporting Reports” section in this chapter.

Format

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



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

Tools

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

Menu Item	Action
Available Drill-Down Reports	If you are running a report that allows you to access one or more drill-down reports, the available drill-down reports will be accessible from the **Tools** menu. See the “Drill-Down Reports” section in Chapter 5, “Reports,” for more information on drill-down reports.
Threshold Settings	Opens a window that allows you to view or modify threshold highlight settings. Threshold highlight settings apply only to some real-time data items in real-time and integrated reports. For information on setting threshold highlights, see the “Setting Threshold Highlights” section in Chapter 5, “Reports.”
Change Agent Splits/Skills	If the current ACD supports Expert Agent Selection (EAS), this menu item reads **Change Agent Skills**; otherwise, it reads **Change Agent Splits**. This menu item is enabled only when the selected grid cell in a report is an agent name or agent login ID; otherwise, it is disabled. If you do not have write permission for ACD Administration, then this menu item is not shown. This action opens the Change Agent Skills window (EAS) or Change Agent Split Assignments window (non-EAS) for the selected agent. You can then modify the split/skill assignments for the agent. See Chapter 8, “ACD Administration,” for more information.

Options

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

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

Report Layouts

There are two types of report layouts in Supervisor:

- **Grids** — the Supervisor presentation of standard CMS reports.
- **Charts** — the Supervisor presentation of Graphical reports.

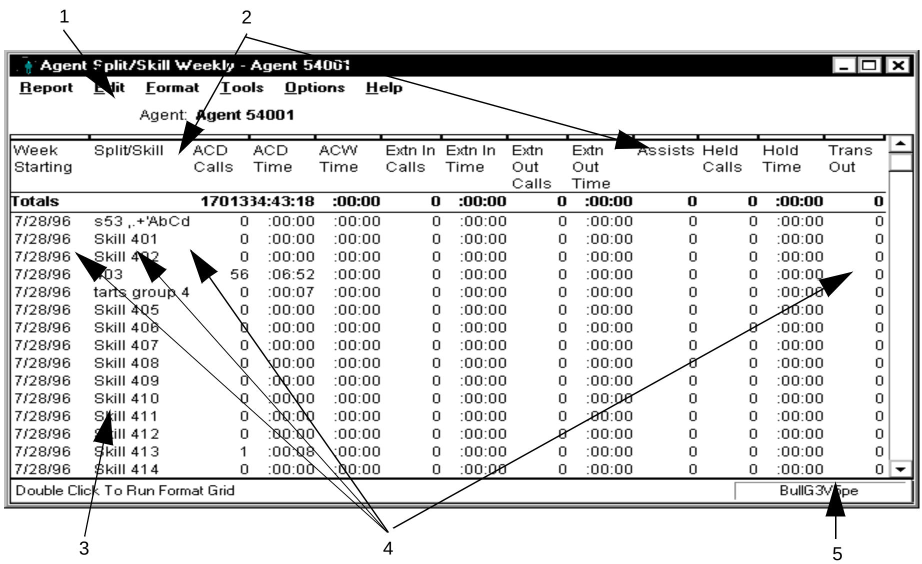
A report can consist of only a grid(s), only a chart(s), or a combination of grids and charts.

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

The following sections describe each type report layout.

Grids

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



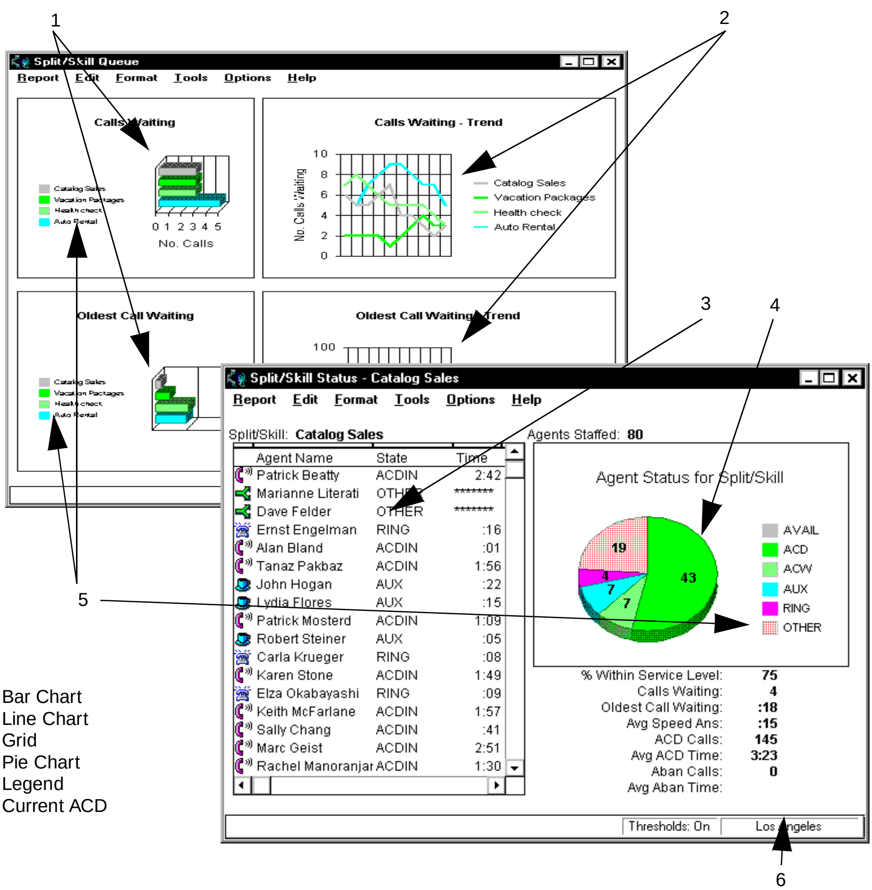
1. Menu Bar
2. Headings
3. Grid
4. Columns
5. Current ACD

Standard real-time reports can be sorted. See the “Formatting Grid Reports” section in this chapter.

Chapter 4

Charts

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



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

There are several options for formatting the appearance of the charts (graphical reports). See the “Formatting Chart Reports” section in this chapter for more information.

Formatting Grid Reports

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

If you are in a report containing a grid, you can format how the report is displayed. The formatting is done in the Grid Format Options window, which is accessed by either of the following steps:

- Double clicking on a column heading in the report

  OR

- Selecting **Format Grid** or **Sort by** from the **Format** menu or the right mouse button pop-up menu.

  Note If you select **Format Grid**, the Grid Format Options window displays with the General tab active.

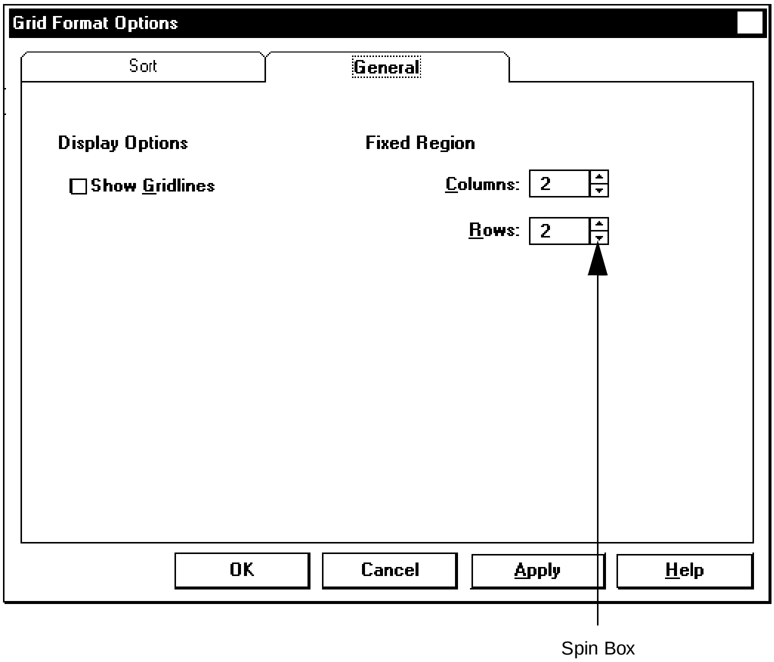
  If you select **Sort by**, the Grid Format Options window displays with the Sort tab active.

The Grid Format Options window allows you to make layout changes to a grid. All changes you make are saved as part of the report view when the report exits.

The following sections describe the General and Sort tabs.

General Tab

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

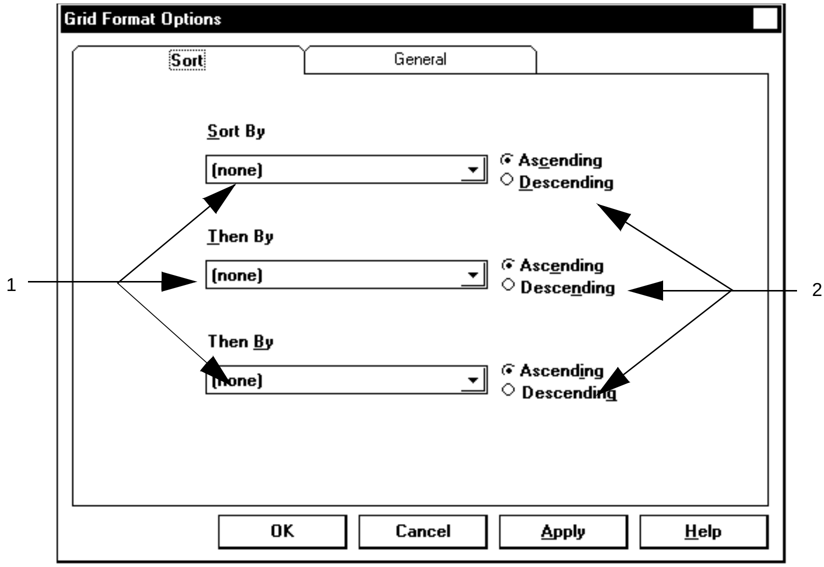


The following grid parameters can be changed:

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

Sort Tab

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



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

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

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

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

Formatting Chart Reports

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

Charts (found in Graphical reports) provide a graphical representation of data. Values or data points are displayed in formats such as bars, lines, filled areas, and pie charts. These data points are grouped into series that are identified with unique colors. In many chart types, one data point from each series is grouped together by category across an axis. A chart can also have a title and a legend. Categories are plotted along the x-axis, values are plotted along the y-axis. A two-dimensional chart shows series next to each other, while a three-dimensional chart plots series along the z-axis.

If you double click on a chart, the Chart Format window displays.

If you are in a Graphical (chart) report, you can format how the report is displayed. The formatting is done in the Chart Format Options window, which is accessed by the following steps:

- Double clicking on a chart in the report

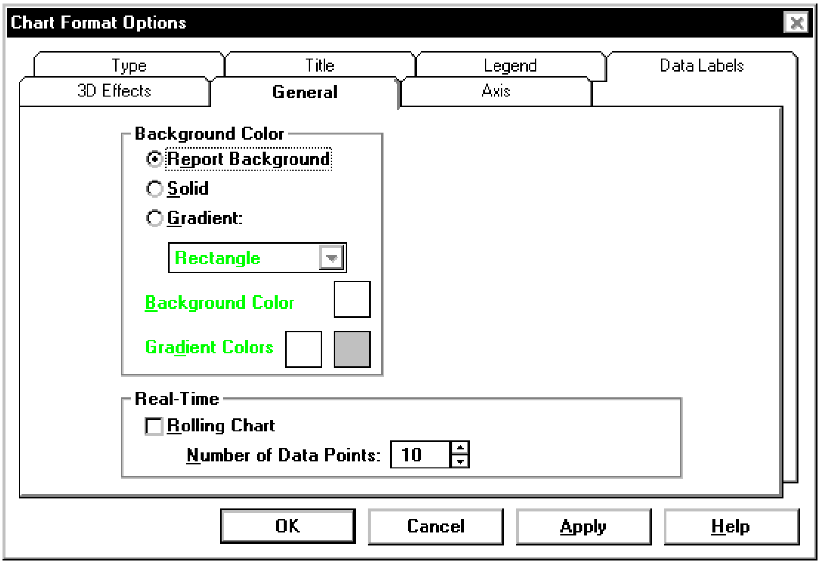
  OR

- Selecting **Format Chart** or **Sort by** from the **Format** menu list or the right mouse button pop-up menu.

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

General Tab

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

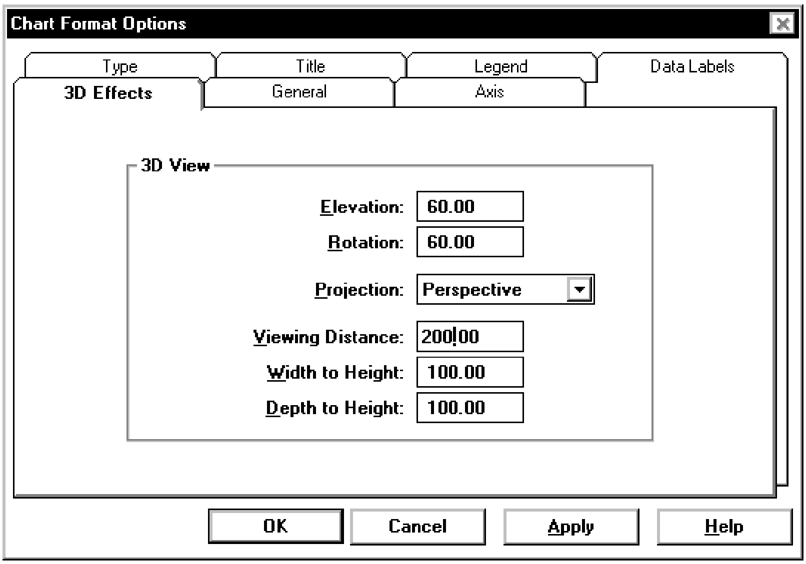


The following chart parameters can be changed:

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

3D Effects Tab

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



The following chart parameters can be changed:

- **Elevation** — a number from 0 through 90 degrees that describes the relative height from which a chart is viewed. An elevation of 90 looks directly down on the top of the chart, while an elevation of 0 looks directly at the side of the chart. The example charts throughout this document use an elevation of 30 degrees.
- **Rotation** — a number from -360 through 360 degrees that specifies the angle that the chart is turned relative to the viewing position. The example charts throughout this document use a rotation of 60 degrees. Rotation does not apply to 3D pie charts.
- **Projection** — selects one of three mathematical algorithms used to give a 3D appearance on a 2D sheet of paper or computer screen. You can choose the following values:
  - — **Oblique**: The chart has depth but the X-Y plane does not change when the chart is rotated or elevated.

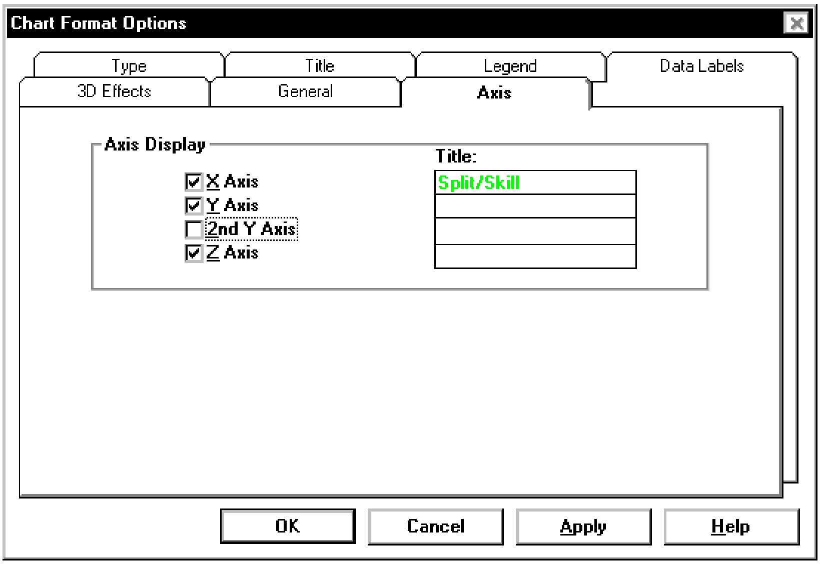
- **Orthogonal**: Perspective is not applied to the chart, resulting in less of a 3D effect. The advantage of using this type of projection is that vertical lines remain vertical, making some charts easier to read.
- **Perspective**: This provides the most realistic 3D appearance. Objects farther away from you converge toward a vanishing point.

- **Viewing Distance** — a number from 50 through 1000 that represents the distance from which the chart is viewed as a percentage of the depth of the chart.
- **Width to Height** — a number from 5 through 2000 that represents the percentage of the chart's height that is used to draw the chart's width.
- **Depth to Height** — a number from 5 through 2000 that represents the percentage of the chart's height that is used to draw the chart's depth.

See the "Rotating a 3D Chart" section in this chapter for an easy way to change the elevation and rotation of a chart using the mouse.

Axis Tab

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

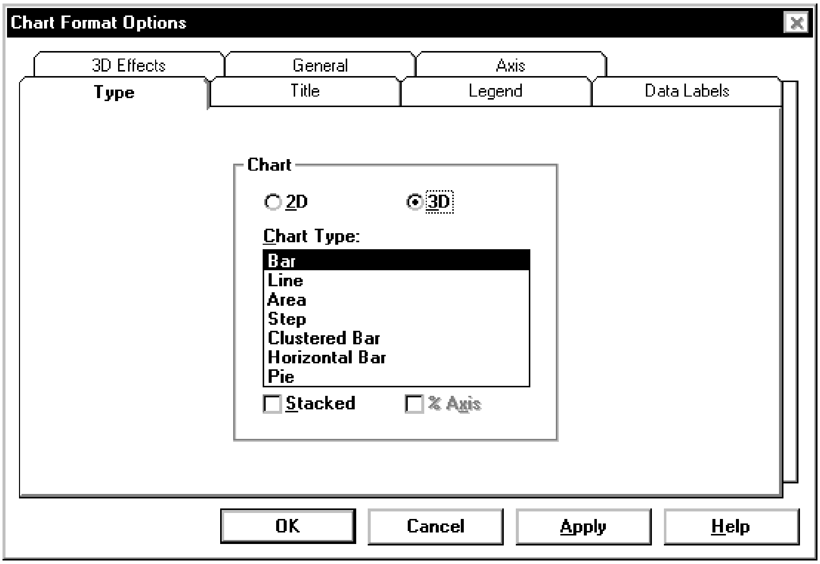


The following chart parameters can be changed:

- **Axis Display** — makes each of the axes visible or invisible. The choices are X Axis, Y Axis, 2nd Y Axis, and Z Axis.

Type Tab

The Type tab lets you change the chart type.



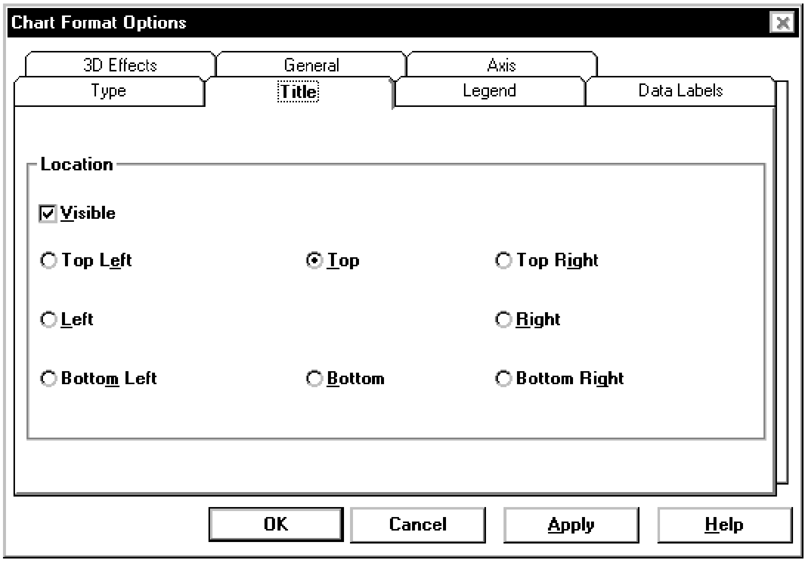
The available options on the Type tab are as follows:

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

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

Title Tab

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



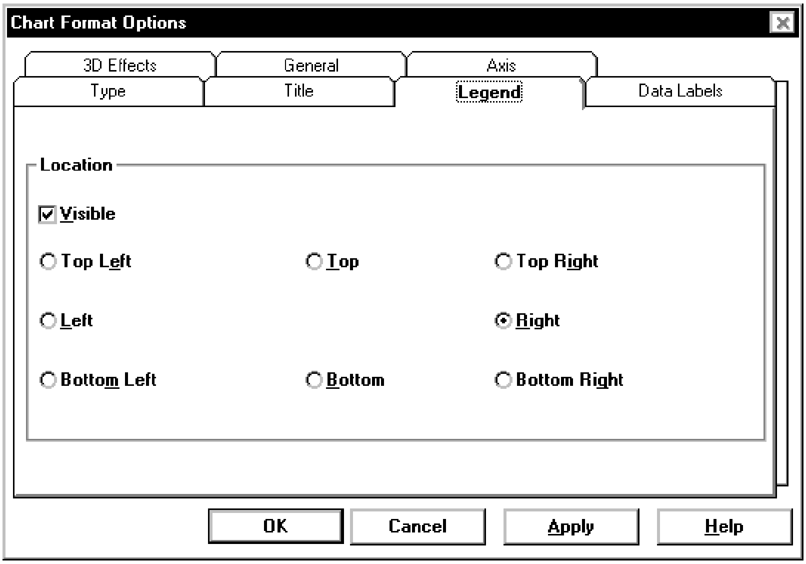
The available options on the Title tab are as follows:

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

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

Legend Tab

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



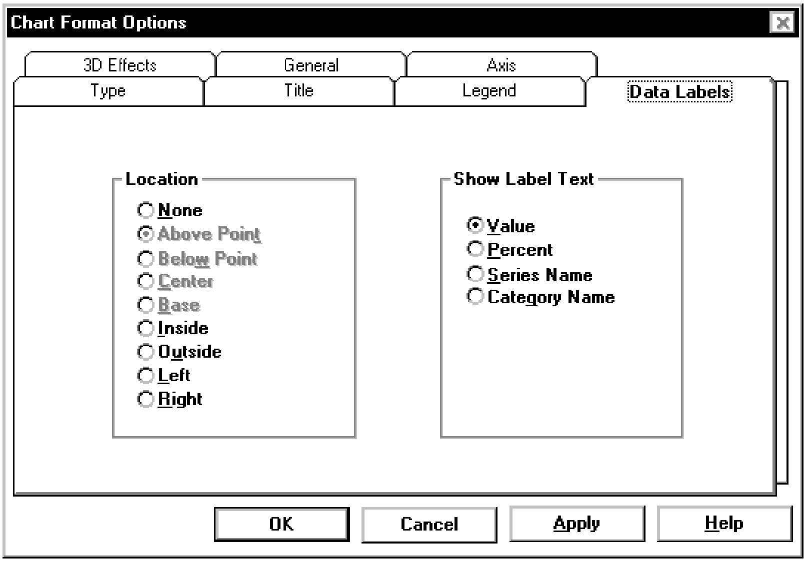
The available options on the Legend tab are as follows:

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

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

Data Labels Tab

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



The following parameters can be specified:

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

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

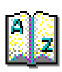
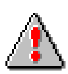
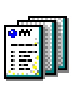
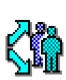
- **Value** — the value of the data point appears in the label.
- **Percent** — the value of the data point appears in the label as a percentage.
- **Series Name** — the series name is used to label the data point.
- **Category Name** — the category name is used to label the data point.

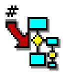
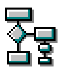
Note The position of data point labels can affect the readability of the chart. The label text may overlap in some situations, making it difficult or impossible to read the labels.

Minimizing Report Output Windows

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

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

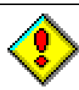
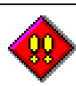
Icon	Report Type
	ACD Administration Reports
	Agent Real-Time, Historical, and Integrated Reports
	Dictionary Reports
	Exceptions Reports
	Maintenance Reports
	Other, Queue / Agent, and Custom Real-Time and Historical Reports
	Split / Skill Real-Time, Historical, and Integrated Reports
	Trunk / Trunk Group Real-Time and Historical Reports

Icon	Report Type
	VDN Real-Time, Historical, and Integrated Reports
	Vector Real-Time and Historical Reports

Minimized Report Thresholds

If Report Thresholds are enabled, real-time and integrated reports continue to update while they are minimized. The report threshold highlighting will work in one of the following ways, depending on the version of *Windows* you are running:

- ***Windows* 3.x or *Windows* NT 3.51** — if no Caution or Warning threshold conditions are currently being met, the report's normal icon displays, as shown on the previous table. If thresholds are currently being met, the Caution or Warning threshold symbol appears instead of the standard report icon. The threshold symbols are as follows:

Icon	Threshold Type
	Caution Threshold
	Warning Threshold

- ***Windows* 95 or *Windows* NT 4.0** — if no Caution or Warning threshold condition is currently being met, the report's normal icon, as shown on the previous table, displays on the toolbar and in the system tray. If thresholds are being met, the report's icon on the toolbar remains the same, but the Caution or Warning threshold symbol appears in the system tray.

  For more information on how the Supervisor icon in the system tray works, see Chapter 2, "Supervisor Basics."

Right Mouse Button Pop-Up Menus

The right mouse button pop-up menu is available only in running reports. When you click the right mouse button, a pop-up menu displays. The menu that displays is dependent on where your cursor is located. It can include options from the **Edit**, **Format**, and **Tools** menus on the Reports menu bar. The applicable menu items for the input field are enabled. If a report object is not selected, a menu is not displayed when you hold down the right mouse button.

Note To deselect a selected object, click anywhere else on the report.

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

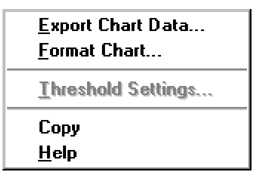
- **Select a cell in a grid and hold down the right mouse button —** a dotted border is drawn around the cell and the following menu displays:

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

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

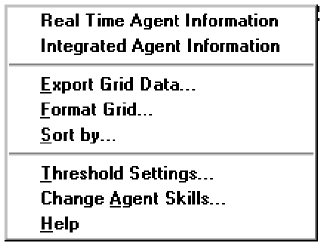
Note The **Threshold Settings** menu item is enabled if the highlighted field has related threshold settings. See the “Setting Report Threshold Highlights” section in Chapter 5, “Reports,” for information on setting report threshold highlights.

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



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

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



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

From this menu, you can access either the Real-Time or the Integrated Agent Graphical Information report. If you double click on the agent name and you are running a real-time report, the default drill-down report is the Real-Time Agent Graphical Information report. For descriptions of the reports, see Chapter 15, “Real-Time Reports,” and Chapter 17, “Integrated Reports.”

You can change an agent’s splits / skills while you are in a report using this method of selection. See the “Changing an Agent’s Splits / Skills While in a Report” section of Chapter 5, “Reports,” for more information.

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

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

From this menu, you can access the Real-Time Split / Skill Work State Report, which also displays when you double click on a work state in the report. For a description of the reports, see Chapter 15, "Real-Time Reports."

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

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

From this menu, you can access the Real-Time Split / Skill Top Agent Work State Report, which also displays when you double click on the work state in the report. For a description of the reports, see Chapter 15, "Real-Time Reports."

Rotating a 3D Chart

The rotation and elevation of any 3D chart can be changed interactively using the mouse. This is easier than using the 3D Effects tab of the Chart Format window (see the “Formatting Chart Reports” section in this chapter for information on using the 3D Effects tab). To change the rotation and elevation of a 3D chart, do the following steps:

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

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

Exporting Reports

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

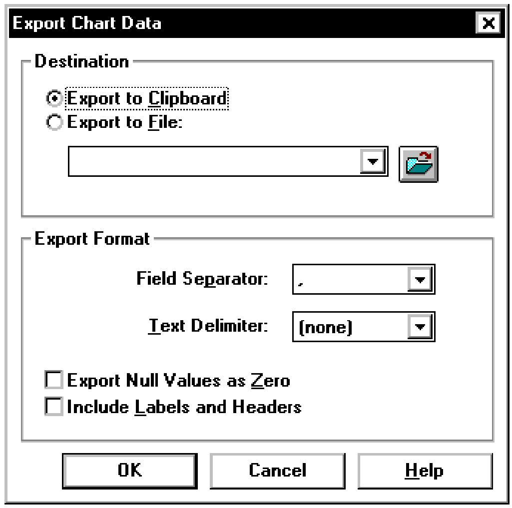
Note By default, only the data from the chart or grid is exported. You can select the Include Labels and Headers check box on the Export Data window to include that information in the export of data.

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

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

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

1. Click on the grid or chart within a report.
2. Select **Export Grid Data** or **Export Chart Data** or **Export All Data**, as appropriate, from the **Edit** menu or the right mouse button pop-up menu.
3. Fill out the Export Data window.



The Export Data window allows you to copy the data from a report to the clipboard or a file. The window displays when you choose to export data from within a report output window. The parts of the Export Data window that you must complete are as follows:

- **Destination selection box** — choose to export the report to the clipboard or to a file. If you are exporting the report to a file, you need to type in a name for the file.

  Note You can select the File button  to browse the files on your PC, or use the history list to select a file you previously used.

- **Export Format selection box** — define the export format of the report. The character you choose from the drop-down list in the Field Separator text box is what will be placed between each field in the report. The character you choose for the Text Delimiter determines what is used around text strings in the exported file. If a text delimiter is specified, no special checks are done to ensure that the data does not contain that character and the data is written unmodified.

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

- **Export Null Values as Zero** — select this check box to include data that is null as a zero in the export of information. This is helpful if you are exporting a grid report because a null value that is not included in the export of the data could disrupt the order of the rows/columns in the data.
- **Include Labels and Headers check box** — select this check box to include the text information (such as column headers in grid reports) in the export of the report's data.

Copying Chart Reports

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

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

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

   The chart you selected is copied to the clipboard.

Resizing Report Windows

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

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

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

Standard CMS Reports

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

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

Graphical Reports

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

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

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

Changing Column Widths

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

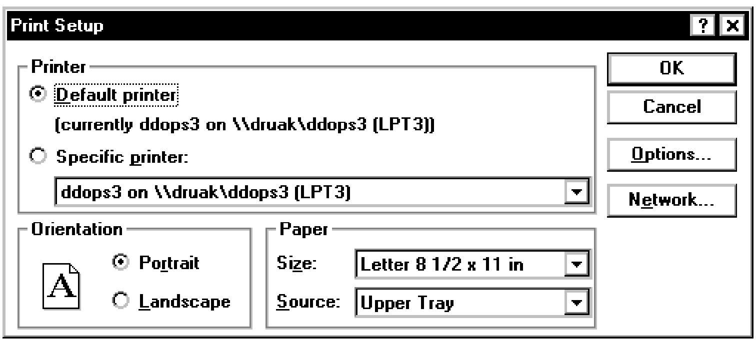
Selecting a Printer

The Print Setup window is a standard *Windows* print window.

To access the Print Setup window, do the following steps:

1. Select a report (from Reports, Dictionary, Exceptions, ACD Administration, or Maintenance).
2. On the report input window, select the Print Setup button  .

   The Print Setup window displays.



The following options are available in the Print Setup window:

- **Default Printer** — the default printer assigned by you in the *Windows* Control Panel will be used.
- **Specific Printer** — you can choose any printer that has been installed in the *Windows* Control Panel. All installed printers are included in the drop-down list. Depending on what printers are installed, non-printer devices such as files and fax may appear here.

Other entries in this window will vary depending on the capabilities of the chosen printer. The *Windows* system software determines what is available here and what happens if the **Options** button is selected. These variations are not described here since *Windows* is in control of this.

Using Page Setup

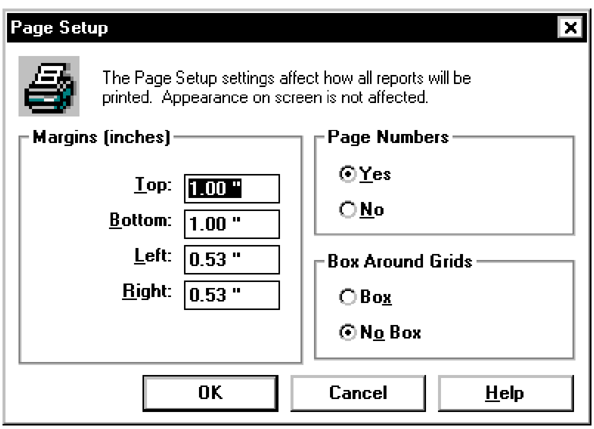
The Page Setup window allows you to specify how each page of a report is positioned when printed. The changes you make in this window apply only to printed reports and do not affect reports displayed on-screen.

The Page Setup window is a standard *Windows* print window.

To access the Page Setup window, do the following steps:

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

   The Page Setup window displays.



The following options are available in the Page Setup window:

- **Margins** — allows you to define the spaces at the edges of the page where nothing will be printed. The margin settings behave as follows:
  - **Top** — the margin is measured from the top of the page. The report is offset by this amount at the top of each page.

— **Bottom** — the margin is measured from the bottom of the page. When a printed grid reaches the bottom of the page, it will continue printing at the top of the next page, with the grid titles repeated. If a chart would overlap the bottom margin, it will be scaled smaller so that it fits within the margin. Text that reaches the bottom of the page will be printed on the next page.

— **Left** — the margin is measured from the left of the page. The report is offset by this amount on the left of each page.

— **Right** — the margin is measured from the right of the page. Grids and text that are too wide to fit on the printed page are truncated at the right margin. Charts that would overlap the right margin are scaled smaller to fit within the margin.

- **Page Numbers** — allows you to choose whether or not to display page numbers. The following settings are valid:

— **Yes** — page numbers will be displayed.

— **No** — no page numbers will be displayed. This is equivalent to the way CMS currently prints reports.

- **Box Around Grids** — allows you to choose whether or not to display a box around report grids when printed. The following settings are valid:

— **Box** — boxes will be displayed.

— **No Box** — boxes will not be displayed.

Exiting and Restarting Reports

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

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

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

To restart a report (return to the report input window), do the following step:

- Select **Restart** from the **Report** menu.

Note Work State drill-down reports cannot be restarted.

5

Reports...

Introduction

This chapter teaches you to run real-time, historical and integrated reports from the **Reports** command. It also teaches you how to perform operations that are specific to the **Reports** command.

This chapter includes the following sections:

- About **Reports**
- Starting **Reports**
- Report Selector Window and Report Manager
- **Reports** Real-Time Tab
- Running a Real-Time Report
- **Reports** Historical Tab
- Running a Historical Report
- **Reports** Integrated Tab
- Running an Integrated Report
- Drill-Down Reports
- Changing Agent Splits/Skills While in a Report
- Setting Report Threshold Highlights.

About Reports

Use the reports you run from the **Reports** command to help you do the following actions:

- Determine how many agents are currently needed to handle incoming calls.
- Manage call volume fluctuations.
- Configure the software to make changes automatically and to meet unexpected demands.
- Change, add, or delete such measured entities as trunks, VDNs, vectors, agents, and splits without downtime in the link between the CMS and the Enterprise Communications Server (ECS) or switch.
- Initiate agent audit trails.

The table on the following page lists the real-time, historical, and integrated reports that are available through the Supervisor application. This table lists all possible reports that might be available through the Supervisor application. The reports that actually display on your Reports selector window will vary, depending on the switch type and your CMS User Permissions.

For information on the standard CMS reports, please refer to the *CentreVu™ CMS Real-Time and Historical Reports* (585-215-821) document. For information on the graphical and integrated report, see the appropriate chapters of this book.

Note Reports are also available in the following Supervisor commands and tools:

- Commands | Dictionary
- Commands | Exceptions
- Commands | ACD Administration
- Tools | Maintenance.

Please see the appropriate chapter for information on reports that are run from other **Commands** and **Tools**.

If you have accessed CMS using the terminal interface, you will find that the Supervisor Graphical reports provide information similar to the graph reports that are available with the optional graphics feature of CMS.

Category	Report Name	Real-Time	Historical	Integrated
Agent	Agent Group Report	❑		
	Agent Report	❑		
	Attendance		❑	
	AUX		❑	
	Event Count		❑	
	Graphical Information	❑		❑
	Graphical Time Spent Daily		❑	
	Group Attendance		❑	
	Group AUX		❑	
	Group Summary		❑	
	In/Outbound		❑	
	Information	❑		❑
	Login/Logout (Split/Skill)		❑	
	Split/Skill		❑	
	Summary		❑	
	Trace		❑	
Other	Call Records		❑	
	Call Work Code		❑	
	Event Count Summary	❑		
	Multi-ACD Report	❑		
	Multi-ACD Top Agent	❑		
Queue/Agent	Queue/Top Agent Status	❑		
	Status	❑		
	Summary	❑		

Chapter 5

Category	Report Name	Real-Time	Historical	Integrated
Split/Skill	Call Profile	❏	❏	❏
	Comparison			❏
	Graphical ASA		❏	
	Graphical AUX Agents	❏		
	Graphical AUX Top Agents	❏		
	Graphical Call Profile	❏		
	Graphical Call Profile Daily		❏	
	Graphical EWT	❏		
	Graphical Queue	❏		
	Graphical Service Level Interval		❏	
	Graphical Skill Time Spent Daily		❏	
	Graphical Split/Skill View			❏
	Graphical Status	❏		
	Graphical Top Skill Status	❏		
	Outbound		❏	
	Report		❏	
	Skill AUX Report	❏		
	Skill Top Agent	❏		
	Split/Skill Status	❏		
	Split/Skill Report	❏		
	Top Agent Status	❏		
	Summary		❏	
System	Multi-ACD		❏	
	Multi-ACD by Split/Skill		❏	
	System		❏	

Category	Report Name	Real-Time	Historical	Integrated
Trunk/Trunk Group	Busy Hour		❑	
	Trunk		❑	
	Trunk Group	❑	❑	
	Trunk Group Summary		❑	
VDN	Busy Hour		❑	
	Call Profile	❑	❑	
	Graphical Call Handling			❑
	Graphical Call Profile	❑		
	Graphical Call Profile Daily		❑	
	Graphical Service Level Interval		❑	
	Multi-ACD Flow		❑	
	Report		❑	
	Skill Preference	❑	❑	
	VDN Report	❑		
Vector	Vector	❑	❑	

Note Some reports may not be available if they are not valid for your switch type or the features you purchased.

About Real-Time Reports

Real-Time **Reports** have the following characteristics:

- Show the current status of ACD activity. The types of data for reports are status, cumulative, and administrative. (See Appendix A, “Database Items and Calculations” in the *CentreVu™ CMS Real-Time and Historical Reports* document (585-215-821) for a description of the data types and database items used in reports.)

  Note All database items and calculations that are used for real-time reports are taken from the current interval tables.

- Display data for the current interval for agent, split/skill, trunk/trunk group, vector, and VDN activities, such as number of ACD calls, abandoned calls, average talk time, and so on.

Cumulative real-time report data are based on the current interval (15, 30, or 60 minutes). The length of the current interval can be changed in the CMS System Setup — Storage Intervals window by a CMS Administrator.

The real-time reports that are available in the Supervisor application include the standard CMS reports and a variety of Supervisor Graphical reports. For definitions of the standard CMS reports, see the *CentreVu CMS Real-Time and Historical Reports* (585-215-821) document. For definitions of the Supervisor Graphical reports, see Chapter 15, “Real-Time Reports.”

About Historical Reports

Historical **Reports** display, report, and summarize the past performance of any measured subset of the ACD. Historical reports display past data for various agent, split/skill, trunk/trunk groups, VDN, and vector activities, such as number of ACD calls, abandoned calls, average talk time, and average speed of answer.

The information in historical reports will give you a sound basis for the following types of decisions:

- Mix of trunk facilities
- Split or skill size
- Agent assignments
- Consistent and objective performance standards
- Performance evaluations.

Historical reports are available in interval, daily, weekly, and monthly formats. All four types are not available for each report. The Select a Report window lists reports based on which types are available (for example: Call Profile Daily, Call Profile Weekly, Call Profile Monthly).

The historical reports that are available in the Supervisor application include the standard CMS reports and a variety of Supervisor Graphical reports. For definitions of the standard CMS reports, see the *CentreVu CMS Real-Time and Historical Reports* (585-215-821) document. For definitions of the Supervisor Graphical reports, see Chapter 16, “Historical Reports.”

About Integrated Reports

Integrated **Reports** show the current status and accumulated data for up to the past 24 hours of ACD, agent, split/skill, trunk/trunk group, vector, and VDN activities.

The integrated reports that are available in the Supervisor application are specific to the Supervisor application and cannot be accessed through a terminal interface to the CMS. For definitions of the Supervisor Integrated reports, see Chapter 17, "Integrated Reports."

About Designer Reports

The Report Designer feature can be purchased with the *CentreVu*™ Supervisor software. The Report Designer allows you to create reports that are tailored to your call center's needs. Using the Report Designer, you can create new reports, edit standard CMS and Supervisor reports, and copy items from one report to another report. The reports you create using the Report Designer can be run from the Supervisor application.

For instructions on using the Report Designer, see the *CentreVu Report Designer User's Guide* (585-215-831).

About CMS Custom Reports

Any Custom Reports you have created are ported to Supervisor. You can view, print, and export the reports in Supervisor. To edit the reports, or create new ones, use the Terminal Emulator or a CMS terminal.

For information on creating and editing Custom Reports, see the *CentreVu*™ *CMS Custom Reports* (585-215-822) document.

Starting Reports

To start **Reports** do the following steps:

1. Select **Reports** from the **Commands** menu.

   OR

   Select the Reports button  on the toolbar.

2. The **Reports** window appears. You will see the following tabs to choose from:
   - Real-Time
   - Historical
   - Integrated.

3. Select the ACD you want to run reports for from the **Run Report for ACD** text box.

4. Select the type of report you want to run from the **Category** box.

5. Select the specific report from the **Report** list box.

6. Select OK.

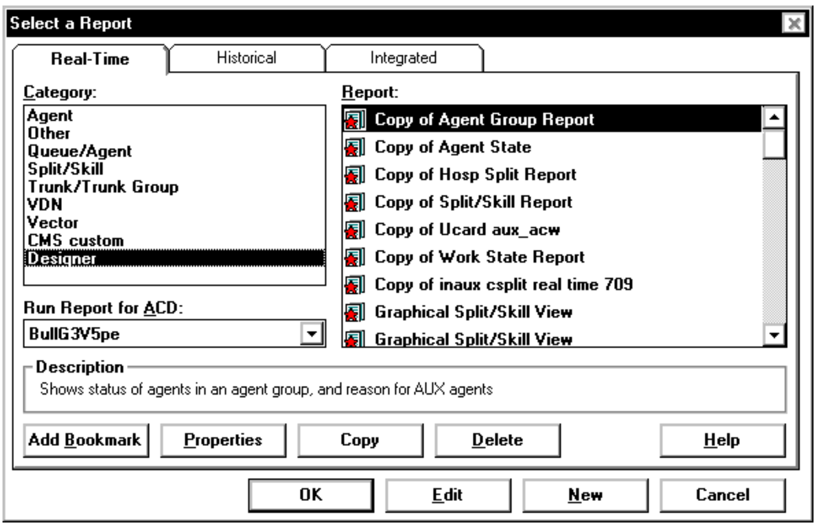
   The report input window displays.

   See the following sections for specific information on real-time, historical, and integrated reports and their associated input windows.

Report Selector Window and Report Manager

The report manager is the feature of the Supervisor application that allows you to view report properties, copy reports, and access the Report Designer to edit reports or create new reports.

The report manager is incorporated into the Reports selector window, as shown below:



You can use the **Properties**, **Copy**, and **Edit** buttons on the Report selector window to manage the standard CMS and Supervisor reports and to copy reports to the Designer category for editing. You can use the **New** button to create a new Designer report. You can use the **Delete** button to delete reports from the Designer category.

Note

For information on using the **Add Bookmark** button, see Chapter 14, "Bookmarks."
For information on using the **Copy**, **Delete**, **Edit**, and **New** buttons, please see the "Using the Report Manager" chapter in the *CentreVu Report Designer* (585-215-831) book.

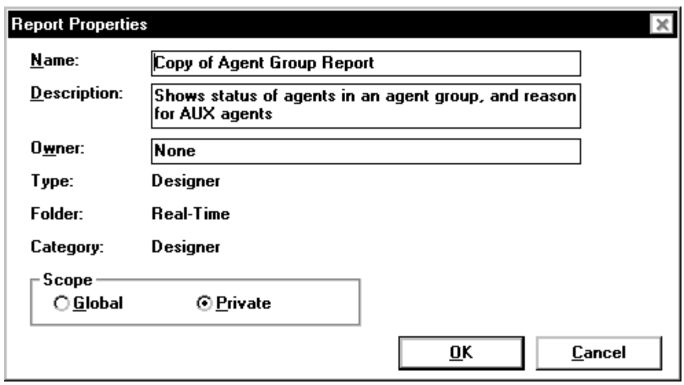
Using the Properties Button

The Report Manager gives you the ability to view report properties, such as the report name, type (global or private), and the folder the report is stored in.

To view a report's properties, do the following steps:

1. Open the Report Selector window.
2. Select the report for which you want to view properties.
3. Click the **Properties** button.

   The Properties window for the report displays:

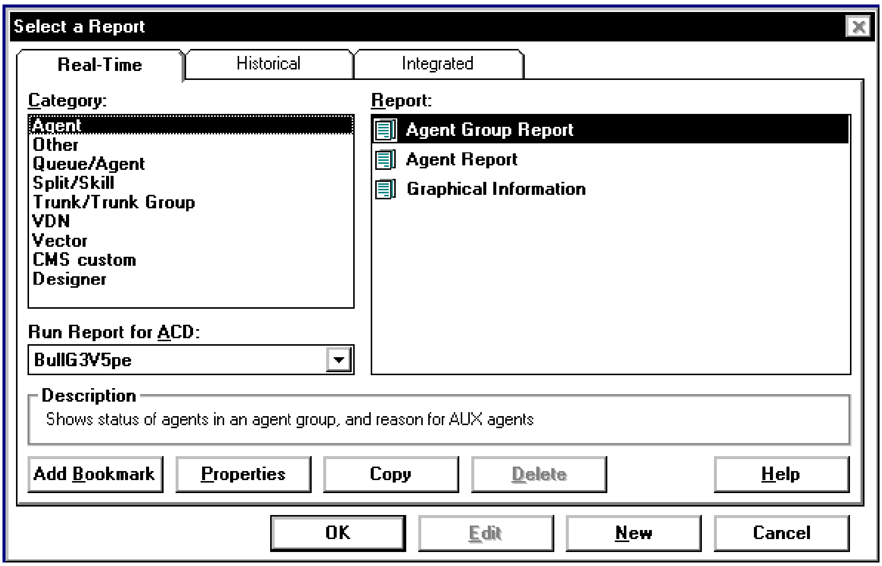


From the Properties window, you can change the **Name**, **Description**, **Owner** or **Scope** scope of a report.

To change the **Name**, **Description**, or **Owner** of a report, place the cursor in the appropriate field and make your edits. To change the **Scope** of a report, select either the **Global** or **Private** radio button. When you are done making your changes, select the **OK** button to save the changes. Permissions will be checked and changes will be saved if the requested modifications are permitted for the user.

Reports Real-Time Tab

The **Reports** Real-Time tab is where you select reports that refresh in real-time. The following graphic shows the Real-Time tab.



Note The options available in the Real-Time tab vary depending on what switch and switch options you have.

From the Real-Time tab, you can select the items that are listed on the following table:

Note For more detail on the following reports, refer to the *CentreVu CMS Real-Time and Historical Reports* (585-215-821) document and Chapter 15, “Real-Time Reports,” in this book.

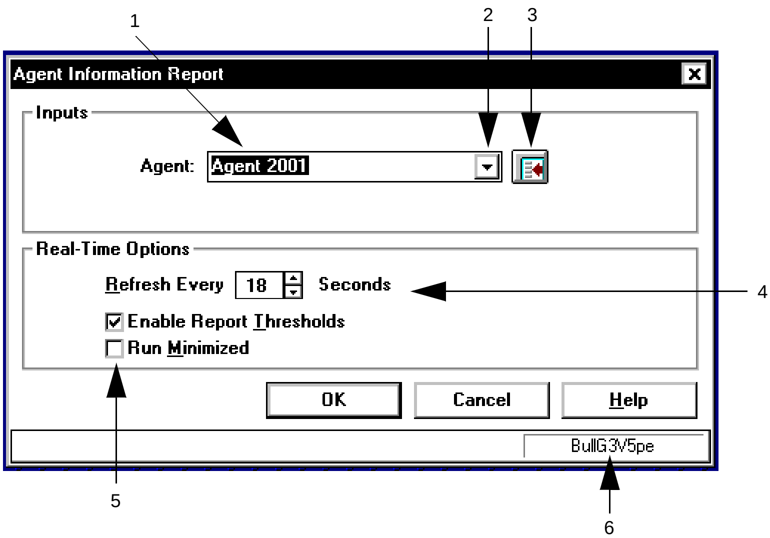
Category	Report Name	Description
Agent	**Agent Group Report**	Shows the status of agents in an agent group and the reason codes for AUX agents.
	Agent Report	Shows the status of agents in a selected split/skill and the reason codes for AUX agents.
	Graphical Information	Graphically shows information and statistics for the specified agent.
	Information	Shows information and statistics for the specified agent.
Other	**Event Count Summary**	Shows the number of times during the current interval that an agent in a split/skill pressed any of the Event Count (Stroke Count) keys while on an ACD call or in ACW.
	Multi-ACD Report	Shows call-handling information on up to six splits/skills and up to four ACDs.
	Multi-ACD Top Agent	Shows call-handling information for the top agents in up to six splits/ skills on up to four ACDs.
Queue/ Agent	**Queue/Top Agent Status**	Summarizes the status of a split/skill and the top agents in that split/skill.
	Status	Shows skill status for a selected skill and agent status with reason codes for AUX agents.
	Summary	Summarizes the status of a split/skill and the agents in that split/skill.

Category	Report Name	Description
Split/Skill	**Call Profile**	Shows the wait times for incoming calls handled and abandoned in a split/skill during the current interval.
	Graphical AUX Agents Report	Graphically shows all agents with this skill who are in AUX, the reason, and the time in AUX. Available with the ECS only.
	Graphical AUX Top Agents Report	Graphically shows all top agents with this skill who are in AUX, the reason, and the time in AUX. Available with the ECS only.
	Graphical Call Profile	Graphically shows how well the split/skill you specify is performing compared to your predefined Acceptable Service Level.
	Graphical EWT	Graphically shows the current EWT for the splits/skills you specify.
	Graphical Queue	Graphically shows the number of calls waiting in the queue and the amount of time the oldest call in queue has waited for the splits/skills you specify.
	Graphical Status	Graphically shows the status of a single split/skill and the status of individual agents in that split/skill in both graphical and grid formats.
	Graphical Top Skill Status	Graphically shows the work state of top agents, status of top agents, and reason codes for top agents who are in AUX. Available with the ECS only.

Category	Report Name	Description
	Skill AUX Report	Shows the number of agents in AUX for each reason code for the selected skills.
	Skill Status	Shows the status of one skill.
	Skill Top Agent	Shows the number of top agents in each work mode and skill status for each of the selected skills.
	Split/Skill Report	Shows the status of up to six splits/skills.
	Split Status	Shows the status of one split.
	Top Agent Status	Shows all of the agents with the selected top skill and their skill status.
Trunk/Trunk Group	**Trunk Group Report**	Shows the status of each trunk in a selected trunk group.
VDN	**Call Profile**	Shows the numbers of answered/connected and abandoned calls to the specified VDN within the current interval.
	Graphical Call Profile	Graphically shows the numbers of answered/connected and abandoned calls to the specified VDN within the current interval.
	Skill Preference	Shows information about the call handling for the VDN as a whole.
	VDN Report	Shows information about how calls to the specified VDNs have been handled.
Vector	**Vector Report**	Shows information about how calls to the specified vectors have been handled.

Reports Real-Time Input Windows

When you select a report to run from the Real-Time tab an input window displays. The real-time report input windows vary, based on the type of report you are running. Below is an example of the input windows you will see.



1. Input Field(s)
2. History List
3. Browse Button
4. Refresh Rate
5. Check-Boxes
6. Current ACD

To run the real-time report do the following steps:

1. Fill in the **input field**(s).

   Input fields are where you specify the information you are running the report for. Most real-time reports have one input field. The input field can ask for split/skill, agent group, trunk group, VDN, or vector. You must complete the input field(s) in order to run the report.

   To complete the input field, do any of the following steps:

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

- Press the Browse button to view all of the available inputs for which you have permissions.
- Use the history list to select an input that you have previously used.

2. Select a **Refresh Rate**.

   The refresh rate determines how often the report is updated to display new data.

   Note The processor speed of and the amount of RAM on your PC can affect refresh rates. Slower PCs or ones with little RAM may require that you use a slower refresh rate. The processor speed of the CMS server can also affect refresh rates.

   Your fastest allowable refresh rate is defined in the User Permissions — User Data window. For any user, the fastest rate that may be defined is every 3 seconds. The actual speed at which a report refreshes may be slower than the defined speed, since the number of active terminals, the number of active windows, and the number of real-time reports can have an impact on refresh rates.

   The default refresh rate when you bring up the report input window is your minimum refresh rate **plus** 15 seconds. You can change the default refresh rate on the report input window. To modify your minimum refresh rate, contact your CMS administrator.

   To change the refresh rate, you can do either of the following steps:

   - Type in the number of seconds you want to pass between updates.
   - Use the up / down arrows to select a number of seconds.

3. Enable / Disable the **check boxes**.

   - **Enable Report Thresholds** — lets you display specific thresholds for items displayed on reports. See the “Setting Report Threshold Highlights” section in this chapter for more information on setting and using report threshold highlights.
   - **Run Minimized** — starts the report minimized, if checked. To open a minimized report, double click on the report icon.

4. Ensure that the **correct ACD** is selected.

The current ACD (selected on the **Reports** selector window) is displayed at the bottom of the input window.

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

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

b. Select **Reports** from the **Commands** menu.

c. Change the ACD on the **Reports** selector window.

d. Select the Category of report you want to run.

e. Select the Report you want to run.

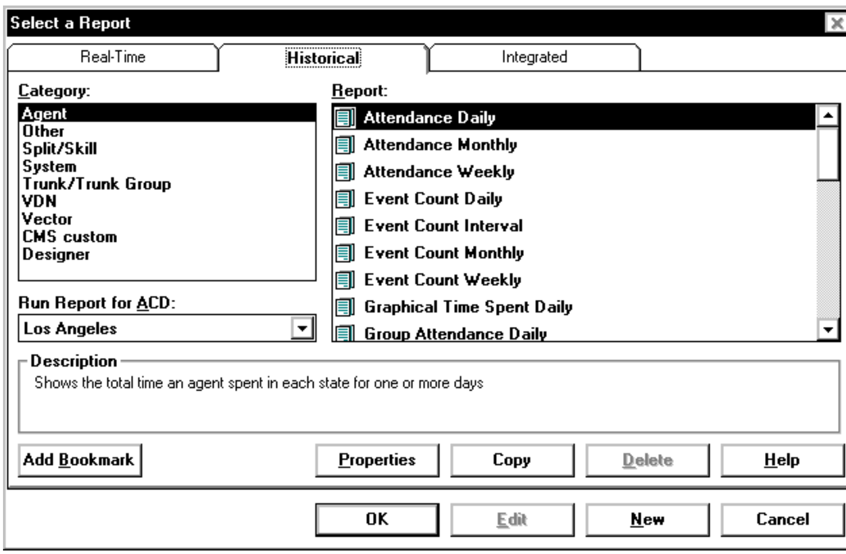
f. Select OK.

5. Select OK.

The report runs.

Reports Historical Tab

The **Reports** Historical tab is where you select and run reports that will give you information tabulated over a period of time. The following graphic shows the Historical tab.



Note The options available in the Historical tab vary depending on what ECS or switch and what ECS/switch options you have.

From the Historical tab, you can select the items that are listed in the following table:

Note For more detail on the following reports, please refer to the *CentreVu™ CMS Real-Time and Historical Reports* (585-215-821) document and Chapter 16, “Historical Reports,” in this book.

Category	Report Name	Description
Agent	**Attendance**	Shows the staffed time, ACD time, ACW time, AUX time, time in RING, EXTN time, AVAIL time, and number of calls handled by an agent for a specified time period for all split/skills to which the agent belongs. (Daily, Monthly, Weekly)
	AUX	Shows time that an agent spent in each AUX reason code. (Daily, Interval, Monthly, Weekly)
	Event Count	Shows the total number of times that an agent has pressed an Event Count (Stroke Count) key for all splits/skills. (Daily, Interval, Monthly, Weekly)
	Graphical Time Spent Daily	Graphically shows the time spent by an agent in each work state and in each AUX reason for the specified day.
	Group Attendance	Shows the staffed time, ACD time, ACW time, AUX time, time in RING, EXTN time, AVAIL time, and number of calls handled for each agent in an agent group for a specified time period for all split/skills to which the agent belongs. (Daily, Monthly, Weekly)
	Group AUX	Shows, for all agents in a group, time in each AUX reason code.
	Group Summary	Summarizes the daily activities of every agent within a specific agent group. (Daily, Monthly, Weekly)
	In/Outbound	Shows a detailed breakdown of the inbound and outbound calls handled by an agent. (Daily, Interval, Monthly, Weekly)

Category	Report Name	Description
	Login/Logout (Skill)	Shows the agent login and logout times for agents in a skill on a specified day.
	Login/Logout (Split)	Shows the agent login and logout times for agents in a specified split on a specified day.
	Split/Skill	Shows an individual agent's performance by split/skill. (Daily, Interval, Monthly, Weekly)
	Summary	Shows the activities and performance of an individual agent for all splits/skills in which the agent is a member. (Daily, Interval, Monthly, Weekly)
	Trace	Lists each agent activity and the time it occurred.
Other	**Call Records**	Shows information about a specific call.
	Call Work Code	Reports on the call work codes that agents entered. (Daily, Monthly, Weekly)
Split/Skill	**Call Profile**	Shows the number of calls answered and abandoned in time increments you administer. (Daily, Monthly, Weekly)
	Graphical ASA	Shows the average speed of answer for ACD calls answered in the specified splits/skills.
	Graphical Call Profile Daily	Graphically shows how well the split/skill you specify performed compared to your predefined service levels.

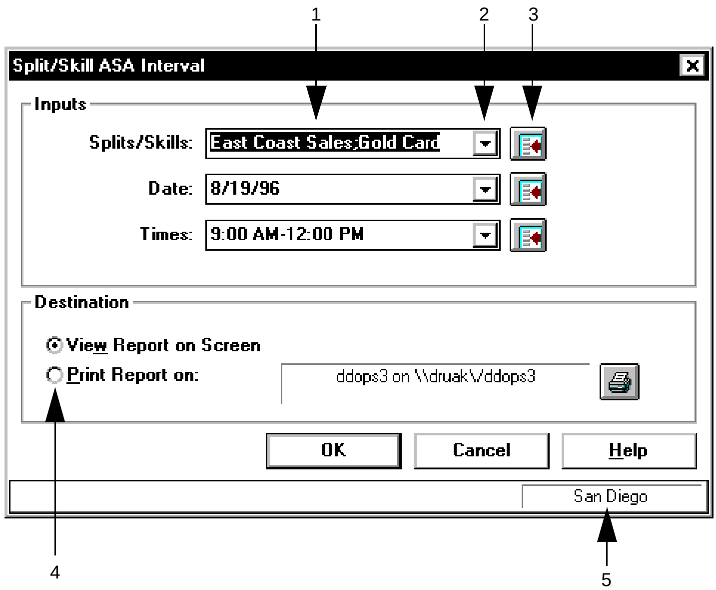
Category	Report Name	Description
	Graphical Service Level Interval	Graphically shows the percentage of ACD calls answered within the predefined acceptable service levels and the percentage of abandoned ACD calls.
	Graphical Skill Time Spent Daily	Graphically shows the amount of time agents spent in each work state and in each AUX reason for the specified skill on the specified day.
	Outbound	Shows the numbers and average talk times for each type of outbound call for a spit/skill. (Daily, Interval, Monthly, Weekly)
	Report	Shows the calls handled, agent time and assists, and transfers and holds for each agent in a split/skill. (Daily, Monthly, Weekly)
	Summary	Summarizes the activity for an entire split/skill by time. (Daily, Interval, Monthly, Weekly)
System	**Multi-ACD**	Summarizes data over all splits/skills in the ACD for each ACD requested. (Daily, Monthly, Weekly)
	Multi-ACD by Split/Skill	Summarizes call-handling information for different splits/skills and different ACDs. (Daily, Monthly, Weekly)
	System	Summarizes the activity for a set of split/skills for the same ACD. (Daily, Monthly, Weekly)
Trunk/ Trunk Group	**Busy Hour**	Shows the busiest hour of the day for each trunk group you select.

Category	Report Name	Description
	Trunk	Shows call traffic data for a single trunk. (Daily, Interval, Monthly, Weekly)
	Trunk Group	Summarizes the incoming and outgoing traffic of every trunk in a trunk group for the specified time period. (Daily, Monthly, Weekly)
	Trunk Group Summary	Shows the level of incoming and outgoing call traffic for an individual trunk group. (Daily, Interval, Monthly, Weekly)
VDN	**Busy Hour**	Shows call handling data for the busiest hour in the selected day for each selected VDN.
	Call Profile	Shows, in segments of progressively longer wait time, the numbers of answered/connected and abandoned calls that are processed by the VDN in the selected time period. (Daily, Monthly, Weekly)
	Graphical Call Profile Daily	Graphically shows how calls to the specified VDN are being handled compared to the predefined acceptable service level.
	Graphical Service Level Interval	Graphically shows the percentage of ACD calls answered within the predefined acceptable service level and the percentage of abandoned ACD calls.
	Multi-ACD Flow	Shows call-handling data for the VDNs and the ACDs you select. (Daily, Monthly, Weekly)

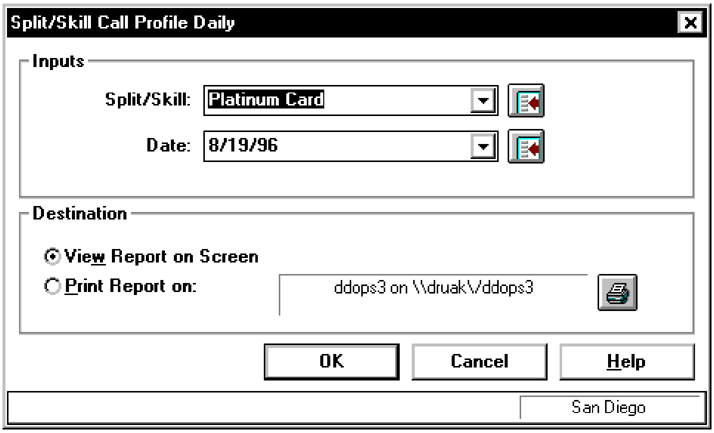
Category	Report Name	Description
	Report	Shows historical information for a specified VDN and time frame. (Daily, Interval, Monthly, Weekly)
	Skill Preference	Shows the number of calls answered, average talk time, and average after call time for calls, by skill preference, to the specified VDN. (Daily, Interval, Monthly, Weekly)
Vector	**Vector**	Shows, for one vector, how well calls on that vector have been handled. (Daily, Interval, Monthly, Weekly)

Reports Historical Input Windows

When you select a report to run from the Historical tab, an input window displays. The historical report input windows vary, based on which category (agent, split/skill, trunk/trunk group, VDN, vector, or other) and type (interval, daily, weekly, monthly) of report you are running. Below is an example of each type of input window you will see.



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



Note The input windows for Weekly and Monthly reports is similar to the Daily input window shown above.

To run the historical report, do the following steps:

1. Fill in the **input field**(s).
2. Input fields are where you specify the information you are running the report for.
   - **Interval** historical reports usually have the following input fields:
     — One for the kind of information on the report (split/skill, agent, trunk, trunk group, vector, or VDN)
     — One for the date for which the report will be run
     — One for the time intervals to be included in the report.
   - **Daily** historical reports usually have the following input fields:
     — One for the kind of information on the report (split/skill, agent, trunk, trunk group, vector, or VDN)
     — One for the date for which the report will be run.

- **Weekly** and **Monthly** historical reports usually have the following input fields:

  — One for the kind of information on the report (split/skill, agent, trunk, trunk group, vector, or VDN)

  — One for the start date for which the report will be run.

  To complete the input fields, do any of the following steps:

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

3. Select the **report destination**.

   Historical reports can be viewed on screen or printed to any printer your PC is connected to, or any PC on your LAN. You can specify the destination for individual reports on the report input window. If you want to view the report on screen, select the View Report On Screen option. If you want to print the report, select the Print Report On: option. If you want to print the report on a printer other than the one shown in the Print Report On: field, select the Print Setup button  and select a different printer.

Note Supervisor Print Setup works the same as the Print Setup in other *Microsoft** *Windows*† applications.

*Microsoft is a registered trademark of Microsoft Corporation.
†Windows is a registered trademark of Microsoft Corporation.

4. Ensure that the **correct ACD** is selected.

   The current ACD (selected on the **Reports** selector window) is displayed at the bottom of the input window.

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

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

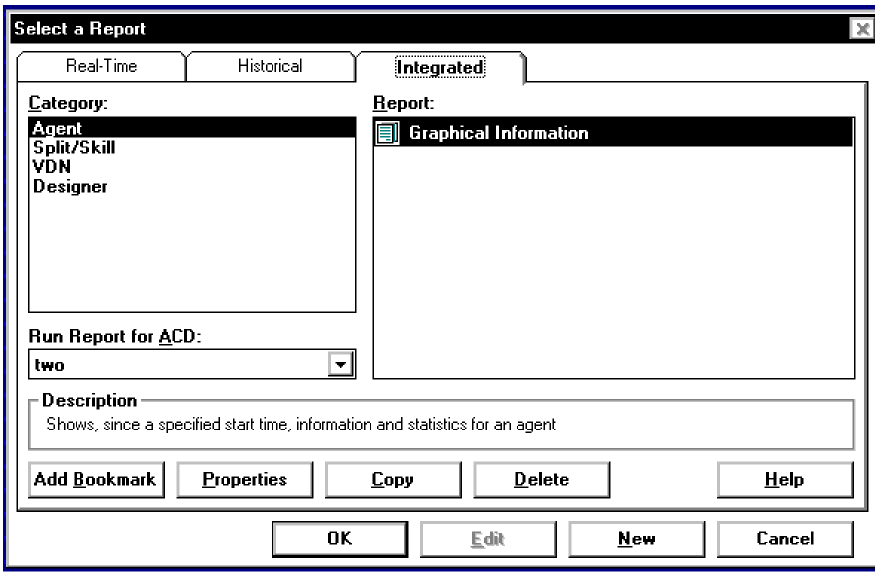
b. Select **Reports** from the **Commands** menu.
c. Change the ACD on the **Reports** selector window.
d. Select the Category of report you want to run.
e. Select the Report you want to run.
f. Select OK.

5. Select OK.

The report runs.

Reports Integrated Tab

The **Reports** Integrated tab is where you select reports that refresh in real-time and show information that is accumulated from any point in time in the past 24 hours. The following graphic shows the Integrated tab.



Chapter 5

Note The options available in the Integrated tab vary depending on what ECS or switch and what ECS/switch options you have.

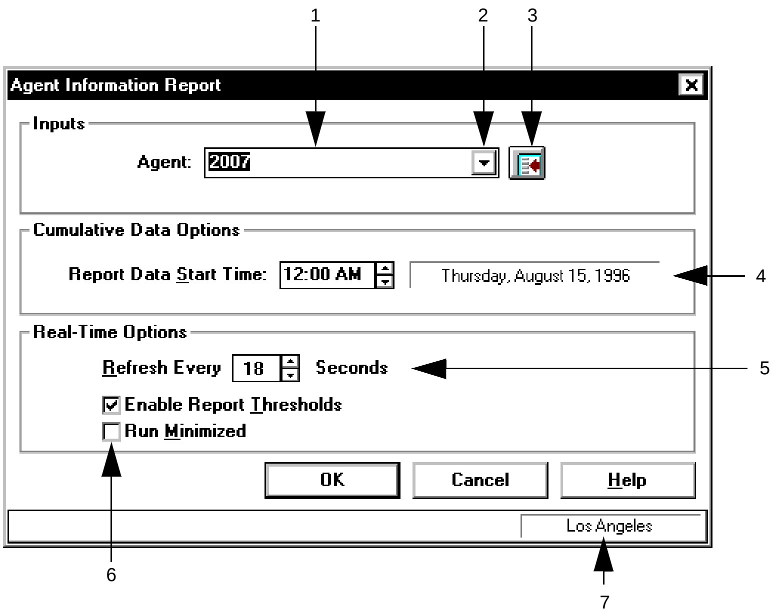
From the Integrated tab, you can select the items that are listed on the following table:

Note For more detail on the following reports, refer to Chapter 17, “Integrated Reports,” in this book.

Category	Report Name	Description
Agent	**Graphical Information**	Graphically shows information and statistics for an agent since a specified start time.
	Information	Shows information and statistics for an agent since a specified start time. This report is not available with the EAS feature.
Split/Skill	**Comparison Report**	Shows the current status and cumulative data for one or splits or skills.
	Graphical Split/Skill View	Graphically shows the status of agents in the split/skill, and cumulative split/skill statistics.
VDN	**Graphical Call Handling**	Graphically shows, for each VDN, the cumulative number of calls that are answered, abandoned, considered outflow calls, and includes ASA.

Reports Integrated Input Windows

When you select a report to run from the Integrated tab, an input window displays. The integrated report input windows vary, based on which type of report you are running. Below is an example of an integrated report input window.



1. Input Field(s)
2. History List
3. Browse Button
4. Start Time
5. Refresh Rate
6. Check-Boxes
7. Current ACD

To run the integrated report, do the following steps:

1. Fill in the **input field**(s).

   Input fields are where you specify the information you are running the report for. Most integrated reports have one input field. The input field can ask for split/skill, agent group, trunk group, VDN, or vector. You must complete the input field(s) to run the report.

You can use any of the following methods to complete the input field:

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

2. Select the **Report Start Time**, which is the time of day, within the past 24 hours, from which you want the report to begin accumulating data.
3. Select a **Refresh Rate**.

The refresh rate determines how often the report is updated to display new data.

Note The processor speed of and the amount of RAM on your PC can affect refresh rates. Slower PCs or ones with little RAM may require that you use a slower refresh rate. The processor speed of the CMS server can also affect refresh rates.

Your fastest allowable refresh rate is defined in the User Permissions — User Data window. For any user, the fastest rate that may be defined is every 3 seconds. The actual speed at which a report refreshes may be slower than the defined speed, since the number of active terminals, the number of active windows, and the number of real-time reports can have an impact on refresh rates.

The default refresh rate when you bring up the report input window is your minimum refresh rate **plus** 15 seconds. You can change the default refresh rate on the report input window. To modify your minimum refresh rate, contact your CMS administrator.

To change the refresh rate, you can do either of the following steps:

- Type in the number of seconds you want to pass between updates.
- Use the up / down arrows to select a number of seconds.

4. Enable / Disable the **check boxes**.

- **Enable Report Thresholds** — lets you display specific thresholds for items displayed on reports. See the “Setting Report Threshold

Highlights" section in this chapter for more information on setting and using report threshold highlights.

- **Run Minimized** — starts the report minimized, if checked. To open a minimized report, double click on the report icon.

5. Ensure that the **correct ACD** is selected.

   The current ACD (selected on the **Reports** selector window) is displayed at the bottom of the input window.

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

   a. If you are in a report input window, select Cancel to exit the report input window.
   b. Select **Reports** from the **Commands** menu.
   c. Change the ACD on the **Reports** selector window.
   d. Select the Category of report you want to run.
   e. Select the Report you want to run.
   f. Select OK.

6. Select OK.

The report runs.

Note Because Integrated reports require that information be collected from the historical database tables, they may be slower to initialize than are real-time reports.

Drill-Down Reports

Supervisor reports allow you to “drill-down” to very detailed information from a variety of places. A “drill-down” report is a report that gives you very specific information on an agent or a work state in a split/skill.

You can access drill-down reports in the following ways:

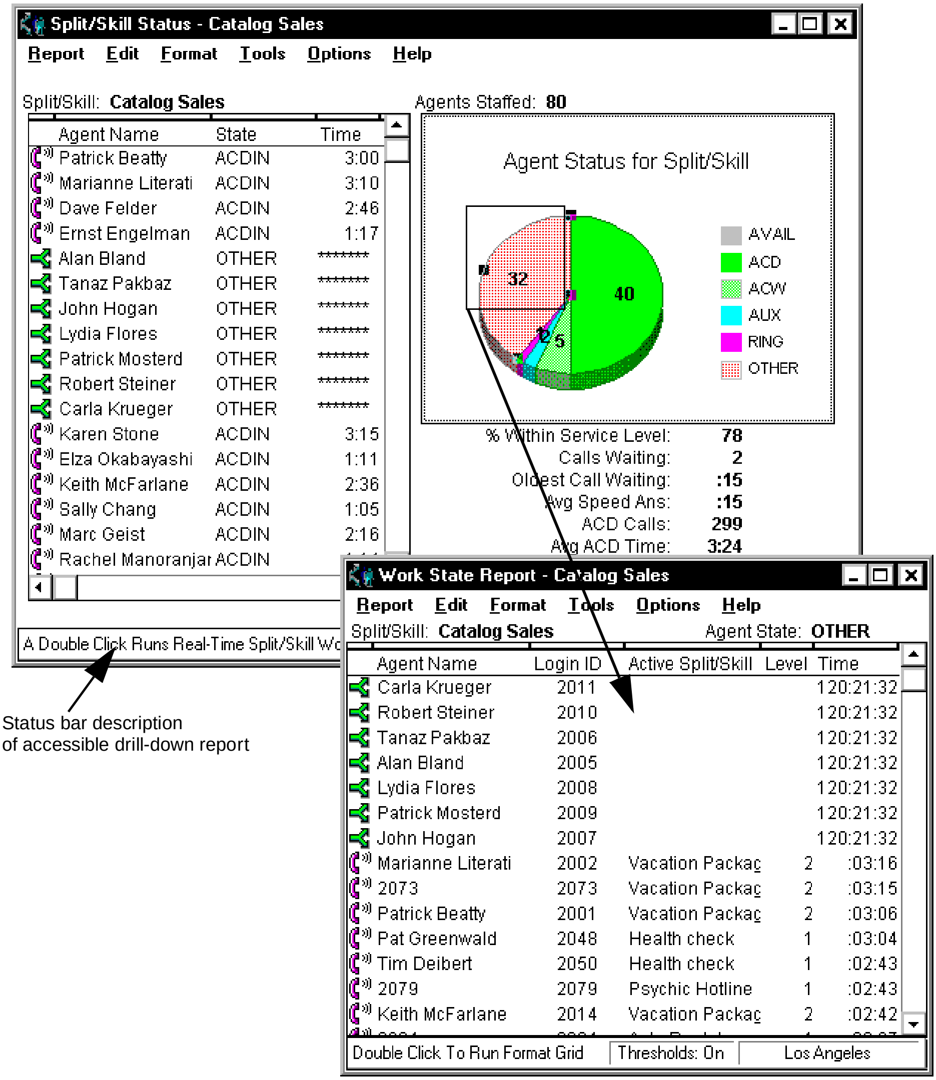
- Double click on an element in a report that allows you to access a drill-down report
- Single click on an element in a report that allows you to access a drill-down report and then using the right mouse button menu to select a specific drill-down report
- Use the **Tools** menu to select any of the drill-down reports that are accessible from the currently running report.

You can tell if the report you are currently running accesses a drill-down report(s) (and which drill-down reports are available) by moving the mouse cursor over information on the report and reading the status bar at the bottom left-hand side of the report window. The following two graphics give examples of the types of report elements you can use to access drill-down reports and the drill-down reports that will display.

There are two basic elements on reports that you can double click or single click on and use the right mouse button menu to access drill-down reports:

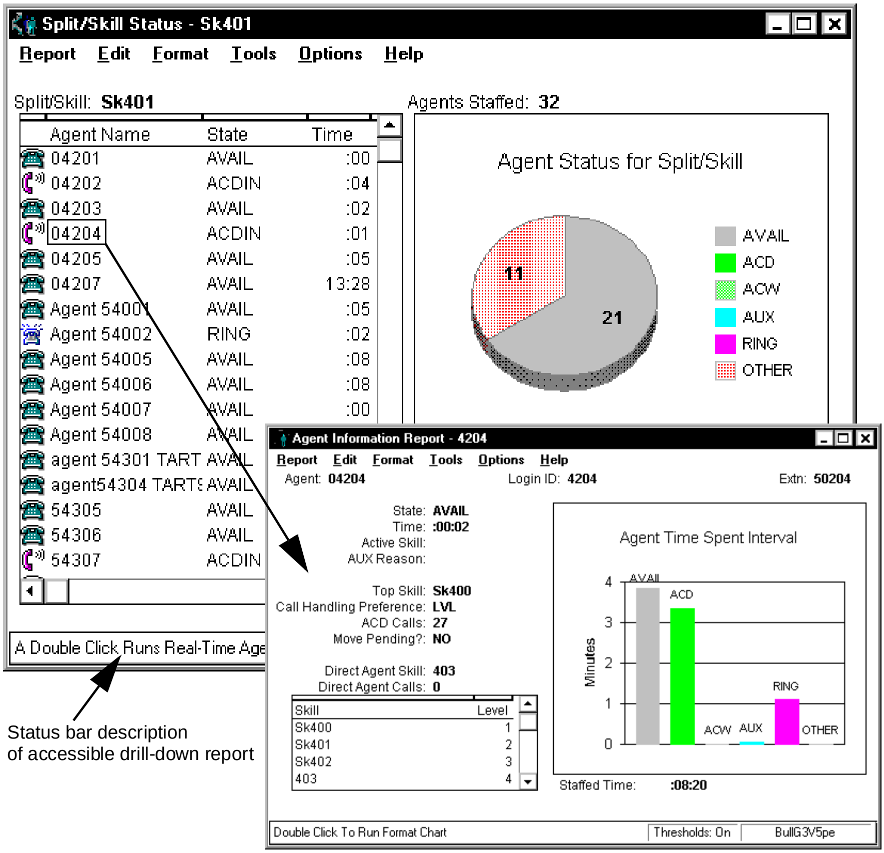
- **Agent names or Login IDs** — drill-down to agent-specific information reports
- **Work states** (AUX, Avail, ACD, ACW, Ring, Other) — drill-down to work state reports or AUX Agents reports (ECS only).

See the following paragraphs for information on which drill-down reports are accessible from specific reports.



Status bar description
of accessible drill-down report

Chapter 5



Many reports allow you to access more than one drill-down report. You can use the **Tools** menu or the right mouse button menu to see all of the drill-down reports that are available for the current report.

The type of drill-down report that you access depends on what kind of report you are currently running and where on the report you double click to access the drill-down report.

Drill-Down Reports Descriptions

The following table gives a brief description of each of the reports you can access using the drill-down procedures. Note that the Agent Work State and Top Agent Work State Real-Time reports are not available from the Reports selector window. They can be accessed only through other reports.

Real-Time Drill-Down Reports		
Category	**Report Name**	**Description**
Agent	**Graphical Information**	Shows graphical information and statistics for the specified agent.
	Information	Shows information and statistics for the specified agent.
Split/Skill	**Graphical AUX Agents**	Shows all agents with the specified skill who are in AUX, the reason for being in AUX, and the time in AUX.
	Graphical AUX Top Agents	Shows all top agents with the specified skill who are in AUX, the reason for being in AUX, and the time in AUX.
	Work State	Shows all of the agents who are in the specified work state and the time in that state.
	Top Agent Work State	Shows top agents who are in the specified work state and the time in the state. Also shows all of the agents who are staffed even if they are not in a particular state for the specified split/skill.
Integrated Drill-Down Report		
Agent	**Graphical Information**	Shows, since a specified start time, information and statistics for an agent.

Real-Time Reports Drill-Down Information

The following table gives you information about which drill-down reports are accessible from specific Real-Time reports.

This Real-Time report:		Drills-down to this report:
Agent	**Agent Group Report**	• Real-Time Agent Information • Integrated Agent Information
	Agent Report	• Real-Time Agent Information • Integrated Agent Information • Real-Time Agent Work State • Real-Time Split/Skill Graphical AUX Agents (ECS with EAS only)
Split/Skill	**Graphical AUX Agents Report**	• Real-Time Agent Information • Integrated Agent Information
	Graphical AUX Top Agents Report	• Real-Time Agent Information • Integrated Agent Information
	Graphical Status	• Real-Time Agent Information • Integrated Agent Information • Real-Time Agent Work State • Real-Time Split/Skill Graphical AUX Agents (ECS with EAS only)
	Graphical Top Skill Status	• Real-Time Agent Information • Integrated Agent Information • Real-Time Agent Top Work State • Real-Time Split/Skill Graphical AUX Top Agents (ECS with EAS only)
	Skill AUX Report	• Real-Time Split/Skill Graphical AUX Agents (ECS with EAS only)
	Skill Status	• Real-Time Agent Information • Integrated Agent Information • Real-Time Agent Top Work State • Real-Time Split/Skill Graphical AUX Top Agents (ECS with EAS only)

This Real-Time report:		Drills-down to this report:
	Skill Top Agent	• Real-Time Agent Top Work State • Real-Time Split/Skill Graphical AUX Top Agents (ECS with EAS only)
	Split Status	• Real-Time Agent Information • Integrated Agent Information • Real-Time Agent Work State
	Split/Skill Report	• Real-Time Agent Work State • Real-Time Split/Skill Graphical AUX Agents (ECS with EAS only)
	Top Agent Status	• Real-Time Agent Information • Integrated Agent Information • Real-Time Agent Top Work State • Real-Time Split/Skill Graphical AUX Top Agents (ECS with EAS only)
Other	**Event Count Summary**	• Real-Time Agent Information • Integrated Agent Information
	Multi-ACD Report	• Real-Time Agent Work State • Real-Time Split/Skill Graphical AUX Agents (ECS with EAS only)
	Multi-ACD by Top Agent Report	• Real-Time Agent Top Work State • Real-Time Split/Skill Graphical AUX Top Agents (ECS with EAS only)

Chapter 5

This Real-Time report:		Drills-down to this report:
Queue/ Agent	**Queue/Top Agent Status**	• Real-Time Agent Top Work State • Real-Time Split/Skill Graphical AUX Top Agents (ECS with EAS only) • Real-Time Agent Work State • Real-Time Agent Information • Integrated Agent Information
	Status	• Real-Time Agent Work State • Real-Time Split/Skill Graphical AUX Agents (ECS with EAS only) • Real-Time Agent Information • Integrated Agent Information
	Summary	• Real-Time Agent Work State

Historical Reports Drill-Down Information

The following table gives you information about which drill-down reports are accessible from specific Historical reports.

This Historical report:		Drills-down to this report:
Agent	**Group AUX (Daily, Weekly, Monthly)**	• Real-Time Agent Information • Integrated Agent Information
	Group Attendance (Daily, Weekly, Monthly)	• Real-Time Agent Information • Integrated Agent Information
	Group Summary (Daily, Weekly, Monthly)	• Real-Time Agent Information • Integrated Agent Information
	Login/Logout	• Real-Time Agent Information • Integrated Agent Information
Split/Skill	**Report (Daily, Weekly, Monthly)**	• Real-Time Agent Information • Integrated Agent Information

Integrated Reports Drill-Down Information

The following table gives you information about which drill-down reports are accessible from specific Historical reports.

This Integrated report:		Drills-down to this report:
Split/Skill	**Graphical Split/Skill View**	• Real-Time Agent Work State • Real-Time Split/Skill Graphical AUX Agent

Changing Agent Splits/Skills While in a Report

You can change an agent's splits (non-EAS) or skills (EAS) from a running report while the agent is logged in by selecting the agent's name and doing one of the following actions:

- Selecting Change Agent Skills from the **Tools** menu
- Selecting Change Agent Skills from the right mouse button menu.

Note If you have the ECS or a G3V4 switch, the changes to agent skills will take place without the agent logging out. If you have any other switch that allows you to change agent splits/skills, the changes are not made until the agent logs out and logs back in.

Refer to the Supervisor on-line help for definitions of the agent state icons you see on some reports.

Setting Report Threshold Highlights

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

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

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

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

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

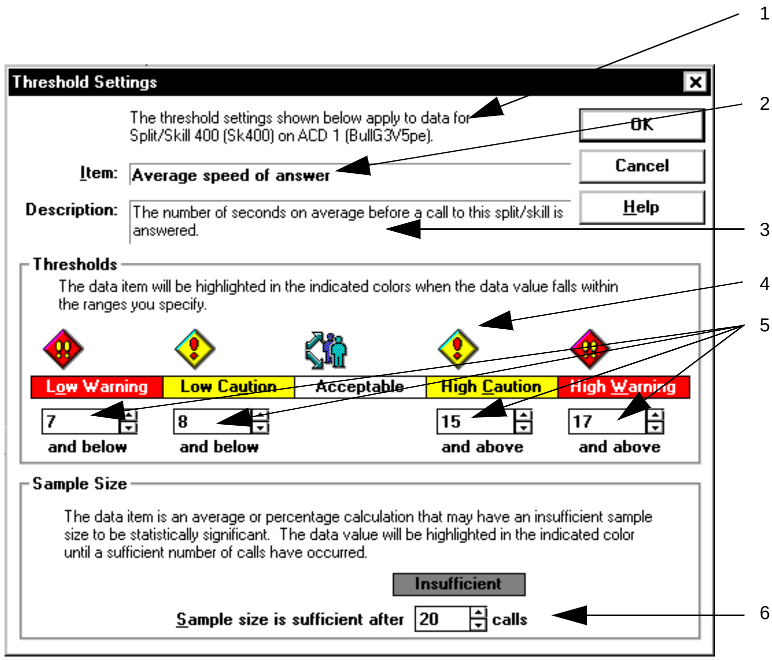
An example of setting report threshold highlights is to set thresholds for Time on ACD Calls in the skill named Sales. You might set the High Caution threshold to 50 seconds and the High Warning threshold to 60 seconds. If an agent spends more than 50 seconds, but less than 60 seconds, on an ACD call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

To set report threshold highlights do the following steps:

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

> **Note** When a data item(s) for which threshold highlights can be set is selected, the **Threshold Settings** menu item is enabled. When the data item that is selected does not allow thresholds, an error message will display. See the tables later in this section for a list of the report outputs that allow threshold highlighting.

3. Select **Threshold Settings** from the right mouse button or from the **Tools** menu.
4. Complete the Threshold Settings window:



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

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

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

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

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

of items that must be currently tracked before the threshold highlighting is enabled.

5. Select OK.

Tips for Setting Report Threshold Highlights

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

- Before you can administer threshold highlights for a data item, you must first click on the data item in the report to select it. When a data item is highlighted in a grid (standard) report, it is outlined with a dotted line. When a data item is highlighted in a chart (Graphical) report, it has “pull-bars” around the perimeter.
- See the “Available Agent Threshold Settings,” “Available Split/Skill Threshold Settings,” and “Available VDN Threshold Settings” sections in this chapter for more information on the real-time data items in reports for which you can set threshold highlights.
- In standard reports, you can select items from the grid or from the output information at the top of the report.
- In chart reports, you can select items from the pie charts, bar charts, graphical reports, or grids.
- When you set threshold highlights for an entity (split/skill, agent, agent group, or VDN), that set of threshold highlights applies to every report that is run specifically for that entity.
- The report threshold highlights are updated with each refresh of the report, but not between report refreshes.
- The numbers you define for the threshold highlights must increase from left to right (the number you use for Low Warning must be less than the number you use for High Warning).

- You can set the label colors by choosing **Options** from the **Tools** menu on the Controller. Depending on how you define the colors, the sample size threshold can behave in the following ways:
  - — If you want to be alerted to the fact that a particular calculation is not statistically significant, set the **Insufficient** color to a different color than any other threshold condition. This causes data with insufficient sample size to be highlighted in a special color.
  - — If you want to ignore values with insufficient sample sizes, set the **Insufficient** color to be black text on a gray background. This causes the value with insufficient sample size to not be highlighted.
- Setting report threshold highlights affects how report data is displayed in the following ways:
  - — If the data calculation contains a non-zero Sample Size threshold, the denominator of the specified calculation is compared to the Sample Size threshold. If the denominator is less than the Sample Size threshold, the value displays in the “Insufficient” color, indicating that the sample size is insufficient for the value to be significant.
  - — If the sample size is sufficient or if there is no sample size associated with the data, then the data value is compared to the Low Warning, Low Caution, High Caution, and High Warning threshold values to determine which band applies. The value is displayed in the color associated with the appropriate threshold.

Available Agent Threshold Settings

All of the data that Supervisor uses for agent threshold highlights are retrieved from the **cagent** (current interval agent) database table. See Appendix A of the *CentreVu™ CMS Real-Time and Historical Reports* (585-215-821) document for more information on the database tables. The agent threshold highlights you can set are as follows:

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

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

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

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

*Sample Size thresholds apply.

Available Split/Skill Threshold Settings

All of the data that Supervisor uses for split/skill threshold highlights are retrieved from the **csplit** (current interval split) database table. See Appendix A of the *CentreVu™ CMS Real-Time and Historical Reports* (585-215-821) document for more information on the database tables. The split/skill threshold highlights you can set are as follows:

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

Chapter 5

Threshold	Description/Database Item or Calculation
Average time to abandon*	*Description* — Average length of time callers waited before abandoning calls to the split/skill. *Measures* — AVG_ABANDON_TIME
Number of calls forced busy	*Description* — Number of calls to the split/skill that were given a busy signal by the switch. *Measures* — BUSYCALLS
Number of calls disconnected	*Description* — Number of calls to the split/skill that were disconnected by the switch. *Measures* — DISCCALLS
Percent of calls answered in service level*	*Description* — Percentage of ACD calls to the split/skill that were answered within the service level. *Measures* — PERCENT_SERV_LVL_SPL
Percent of calls abandoned*	*Description* — Percentage of ACD calls to the split/skill that were abandoned. *Measures* — PERCENT_CALL_ABAN
Number of agents staffed	*Description* — Number of agents logged into the split/skill. *Measures* — STAFFED
Percent of calls answered*	*Description* — Percent of ACD calls offered to the split/skill that were answered. *Measures* — PERCENT_CALL_ANS
Call Profile Abandon per service level increment	*Description* — Number of abandoned calls to the split/skill for any service level increment. A single report threshold applies to all of the values. If the number of abandoned calls for the split/skill reaches the threshold for any of the service level increments, the value for that service level increment is highlighted. *Measures* — ABNCALLS1 through ABNCALLS10

Threshold	Description/Database Item or Calculation
Rolling Average Speed of Answer	*Description* — Switch-based Rolling Average Speed of Answer for this split/skill. The Rolling Average Speed of Answer is the average speed of answer across intervals. *Measures* — ASA
Expected Wait Time (Low)	*Description* — Expected Wait Time for a call queued to this split/skill at a low priority level. *Measures* — EWTLOW
Expected Wait Time (Medium)	*Description* — Expected Wait Time for a call queued to this split/skill at medium priority level. *Measures* — EWTMEDIUM
Expected Wait Time (High)	*Description* — Expected Wait Time for a call queued to this split/skill at high priority level. *Measures* — EWTHIGH
Expected Wait Time (Top)	*Description* — Expected Wait Time for a call queued to this split/skill at top priority level. *Measures* — EWTTOP

*Sample Size thresholds apply

Available VDN Threshold Settings

All of the data that Supervisor uses for VDN threshold highlights are retrieved from the **cvdn** (current interval VDN) database table. See Appendix A of the *CentreVu™ CMS Real-Time and Historical Reports* (585-215-821) document for more information on the database tables. The VDN threshold highlights you can set are as follows:

Threshold	Description/Database Item or Calculation
Number of calls abandoned during the interval	*Description* — Number of calls that were queued to this VDN and then abandoned. *Measures* — ABNCALLS
Number of calls forced busy during the interval	*Description* — Number of calls to the VDN that were given a busy signal by the switch. *Measures* — BUSYCALLS
Number of calls disconnected during the interval	*Description* — Number of calls to the VDN that were disconnected by the switch via the vector "disconnect" command. *Measures* — DISCCALLS
Oldest call waiting	*Description* — Number of seconds the oldest call has waited in this VDN. *Measures* — OLDESTCALL
Number of calls waiting	*Description* — Number of calls queued to this VDN that have not been answered by an agent. *Measures* — INPROGRESS - ATAGENT
Percent of calls answered in service level*	*Description* — Percentage of ACD calls to the VDN that were answered within the service level. *Measures* — 100*(ACCEPTABLE / INCALLS)
Percent of calls abandoned*	*Description* — Percentage of ACD calls to the VDN that were abandoned. *Measures* — 100*(ABNCALLS / INCALLS)
Percent of calls answered*	*Description* — Percentage of ACD calls offered to the VDN that were answered. *Measures* — 100*[(ACDCALLS + CONNECTCALLS) / INCALLS]

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

*Sample Size thresholds apply

Chapter 5

6

Dictionary...

Introduction

This chapter teaches you how to use the Operations and Reports tabs in the **Dictionary** command. It also gives you information on performing tasks that are specific to the **Dictionary** command.

The sections in this chapter are as follows:

- About **Dictionary**
- Starting **Dictionary**
- **Dictionary** Operations Tab
- **Dictionary** Operations Input Windows
- **Dictionary** Reports Tab
- **Dictionary** Report Input Windows
- Assigning Names Using **Dictionary**
- Creating Agent Groups
- Deleting Agents from an Agent Group.

How **Dictionary** works in CMS is not described in detail in this chapter. For more information on **Dictionary** operations and reports, please refer to the "Dictionary" chapter in the *CentreVu™ CMS R3V5 Administration* (585-215-820) document.

About Dictionary

From the **Dictionary** command, you can perform the following functions:

- Enter *CentreVu* CMS login IDs and corresponding agent names.
- Assign names to splits/skills, trunk groups, call work codes, ACDs, AUX reason codes, logout reason codes, VDNs, and vectors.
- Create agent groups.
- Modify agent, split/skill, and trunk string values.
- View standard *CentreVu* CMS database items and calculations.
- Define your own calculations, constants, and custom database items.
- Globally search for anything in the **Dictionary** subsystem and search for patterns from any data entry field.
- Obtain a report on most parts of the **Dictionary** subsystem.

Note Items that are not administered in **Dictionary** do not show up as global search items.

Starting Dictionary

To select any **Dictionary** item do the following steps:

1. Choose **Dictionary** from the **Commands** menu.

   OR

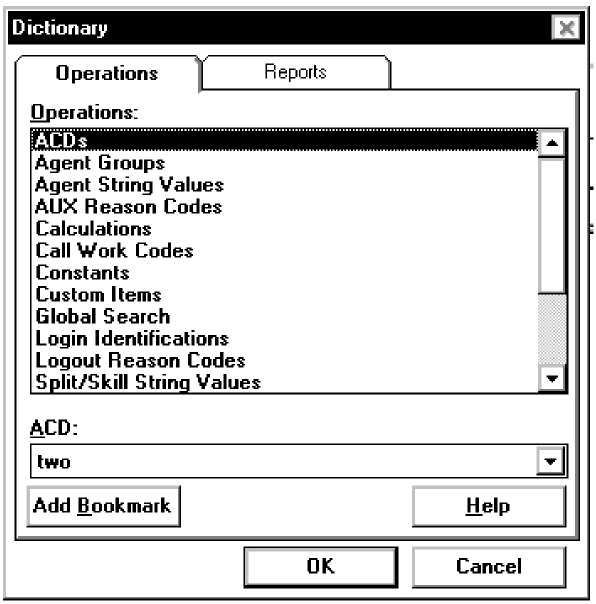
   Select the Dictionary button  on the toolbar.

2. The **Dictionary** window appears. You will see the following tabs to choose from:

   - Operations
   - Reports.

Dictionary Operations Tab

The following graphic shows the **Dictionary** Operations available in Supervisor. Splits/Skills, Standard CMS Items, Trunk Groups, Trunk String Values, VDNs, and Vectors are not shown in the visible window area when the window first opens. Use the scroll bar to the right of the Operations list box to display these options.



You may choose the following items from the **Dictionary** Operations tab.

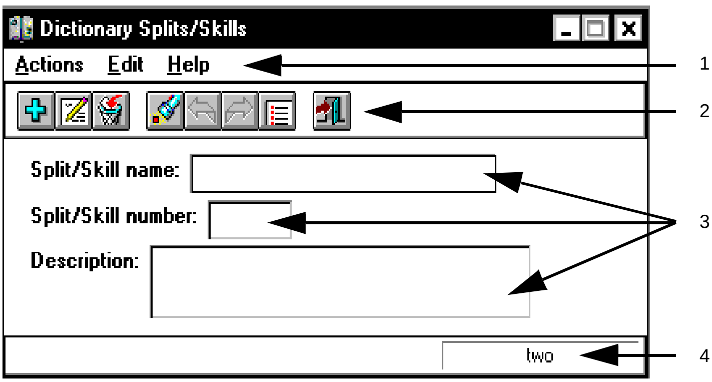
Note For more detail on the following **Dictionary** items, please refer to the “Dictionary” chapter of the *CentreVu™ CMS R3V5 Administration* (585-215-820) document.

- **ACDs —** use to assign names to any real or pseudo ACDs located on the switch or in ACD administration.
- **Agent Groups** — use to create and name, copy, or delete agent groups. Use this window to add, delete, or list the agents in a group.
- **Agent String Values** — use to modify the descriptive words (that appear as field values) on reports dealing with agents. For example, you may modify names of agent states such as “ACD,” “ACW,” or “AVAIL.”

- **AUX Reason Codes** — use to assign names to AUX reason codes. AUX reason codes enable a call center to track an agent's time more precisely when the agent is in the AUX state.
- **Calculations** — use to define names for calculations that are used in reports on *CentreVu* CMS.
- **Call Work Codes** — use to assign names to call work codes.
- **Constants** — use to define items with fixed numerical values that you can enter into the database and use in custom reports.
- **Custom Items** — use to define your own database items which are stored in their own tables within the CMS database.
- **Global Search** — use to search for anything in **Dictionary** (for example, a Login ID).
- **Login Identifications** — use to assign agent names to CMS login IDs.
- **Logout Reason Codes** — use to assign names to logout reason codes. These codes enable an agent to specify the reason for logging out, such as the end of a shift or training.
- **Split/Skill String Values** — use to modify the descriptive words (that appear as field values) on the Split/Skill Call Profile reports.
- **Splits/Skills** — use to assign names (to make your reports easier to identify and read) to your ACD splits or skills.
- **Standard CMS Items** — use to display the names of columns in CMS database tables. CMS uses the database tables to collect, store, and retrieve report information.
- **Trunk Groups** — use to assign names (to make your reports easier to identify and read) to your trunk groups.
- **Trunk String Values** — use to modify the descriptive words (that appear as field values) on trunk reports.
- **VDNs** — use to assign names to VDNs so that names, instead of VDN numbers, appear on VDN reports and administration windows.
- **Vectors** — use to assign names to vectors so that names, instead of vector numbers, appear on vector reports and administration windows.

Dictionary Operations Input Windows

When you select an item from the **Dictionary** Operations list, an input window displays. Below is an example of one of the input windows that you will see.



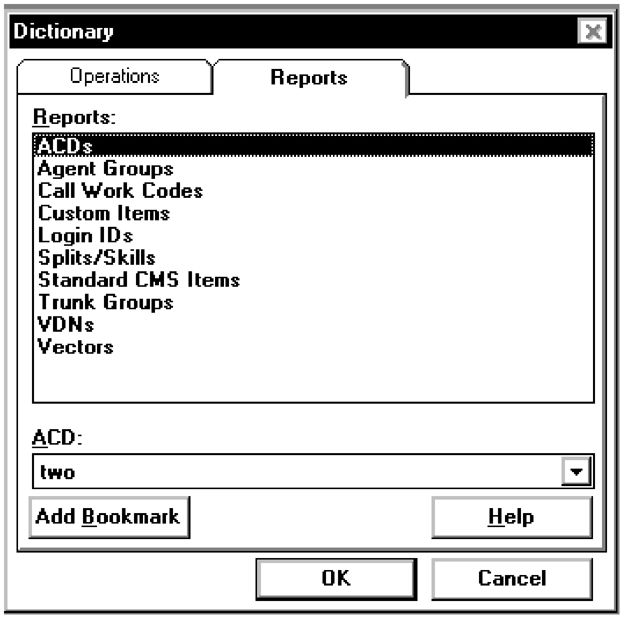
1. Menu Bar
2. Toolbar Action Buttons
3. Input Fields
4. Current ACD

The input window that displays is dependent on the operation you selected.

- **Menu Bar** — includes pull-down lists for CMS **Actions** (Add, Delete, Modify, Find One, Next, Previous, List All, and Exit), **Edit** options (Cut, Copy, Paste, and Clear All), and Supervisor **Help**.
- **Toolbar Action Buttons** — let you perform CMS actions (Add, Delete, Find One, Next, Previous, List All, and Exit) by clicking on a button. See Chapter 3, "Operations Basics," for more information on the action buttons.
- **Input Fields** — are text boxes where you type in the information needed to complete the CMS action.
- **Current ACD** — displays the ACD affected by the current operation.

Dictionary Reports Tab

Use the Reports tab to access any reports you wish to display. The following graphic shows the **Dictionary** Reports available in Supervisor.



You may choose any of the following categories from the Reports tab.

Note For more detail on the following **Dictionary** categories, please refer to the “Dictionary” chapter of the *CentreVu™ CMS R3V5 Administration* (585-215-820) document.

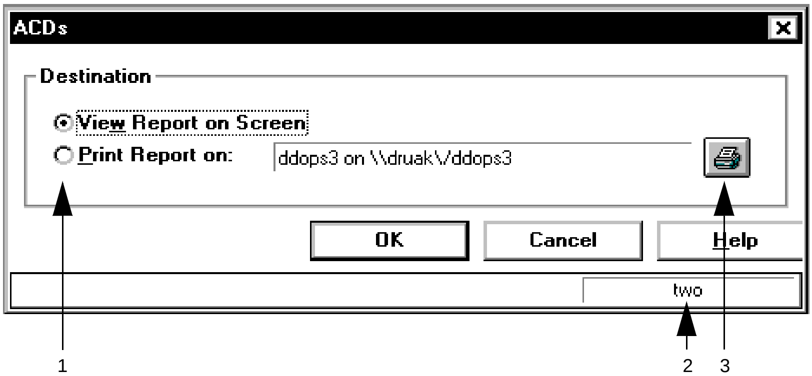
- **ACDs —** gives you a report of the assigned ACD names and numbers.
- **Agent Groups** — lists the names of existing agent groups.
- **Call Work Codes —** lists currently administered call work codes with their names and descriptions.
- **Custom Items** — gives you a report of all the Custom Items.
- **Login IDs** — lists login IDs with their currently assigned names.

- **Splits/Skills —** lists splits / skills with their assigned names and descriptions.
- **Standard CMS Items —** gives you a report of all the Standard CMS Items.
- **Trunk Groups** — lists the trunk groups with their names and descriptions.
- **VDNs —** lists VDNs with their names and descriptions.
- **Vectors** — lists vectors with their names and descriptions.

Note These reports list only items that have names assigned in the dictionary. Items that exist on the switch but do not have names assigned in the Dictionary subsystem will not appear in the reports.

Dictionary Report Input Windows

When you select an item from the **Dictionary** Reports list, an input window displays. Below is an example of one of the input windows that you will see.



1. Destination Radio Buttons
2. Current ACD
3. Print Setup Button

- **Destination** — allows you to select where the report is produced (on screen or printed).
- **Print Setup Button**— allows you to select the printer on which the report prints. For more information on print setup, see the “Selecting a Printer” section of Chapter 4, “Reports Basics.”
- **Current ACD** — displays the ACD for which the report will run.

Chapter 6

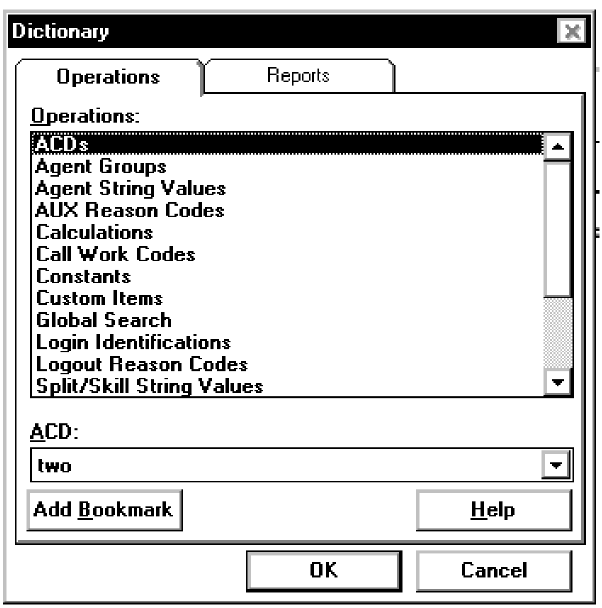
Assigning Names Using Dictionary

The Dictionary subsystem allows you to give names to ACDs, Call Work Codes, Agent Login IDs, Splits/Skills, Trunk Groups, VDNs, and Vectors. These items are given numbers when they are created on the switch. You can use the **Dictionary** command to name an item. For example, if your skills have names in **Dictionary**, then when you run a report that has skills as output, the skill names will appear instead of the skill numbers.

To assign a name in **Dictionary**, do the following steps:

1. Select **Dictionary** from the **Commands** menu, or select the Dictionary button  on the toolbar.

   The Supervisor Dictionary window displays.

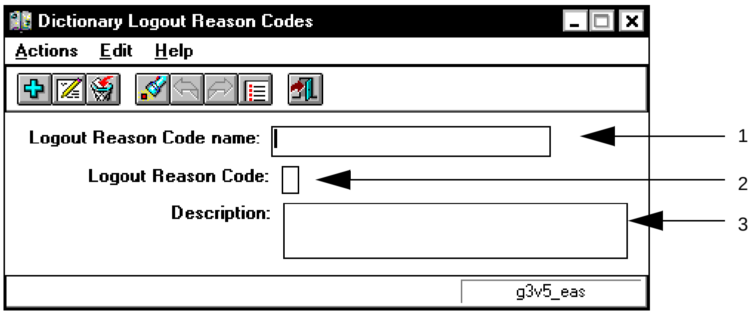


Note You must select the Operations tab, if it is not already selected, to display the list of operations.

2. Select the desired item from the operations listed under the Operations tab.

3. Select OK.

   The input window for the selected item displays. For example, the Login Identifications input window is shown below.



1. Name Text Box
2. Number Text Box
3. Description

4. Complete the input fields:

   - **Number Text Box** — Type in the number to which the name will correspond.
   - **Name Text Box** — Type in the name you want displayed for this item in *CentreVu* reports.
   - **Description** (optional) — You may type in a description of the item.

5. Select **Add** from the **Actions** menu, select the Add button  on the toolbar, or press Ctrl+A.

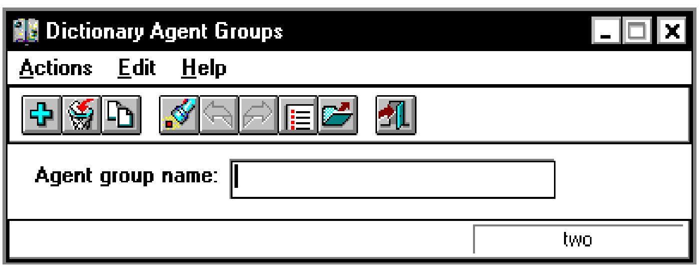
   The name is loaded into the dictionary database.

Creating Agent Groups

To create an agent group, do the following steps:

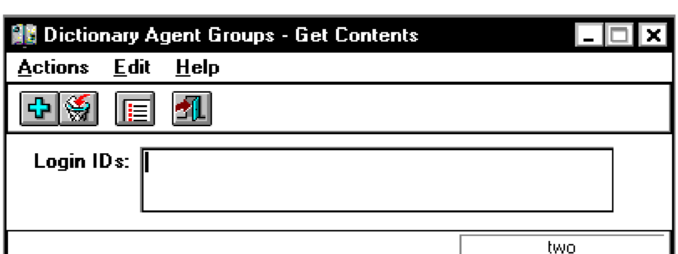
1. Select **Dictionary** from the **Commands** menu, or select the Dictionary button on the toolbar.
2. Select **Agent Groups** from the Operations tab.
3. Select the ACD for which you want to create an agent group.
4. Select OK.

   The Agent Groups input window displays.



5. Type the name of the agent group you want to create.
6. Select **Add** from the **Actions** menu, select the Add button on the toolbar, or press Ctrl+A.
7. Select **Get contents** from the **Actions** menu, or select the Get Contents button on the toolbar.

   The Dictionary Agent Groups — Get Contents window displays.



8. Type the login IDs of the agents you want to add to this agent group in the text box.
9. Select **Add** from the **Actions** menu, select the Add button  on the toolbar, or press Ctrl+A.

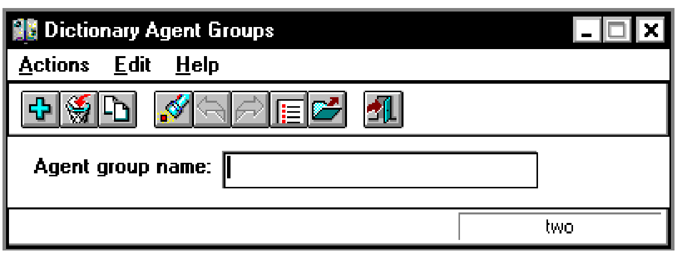
   The login IDs are added to the agent group.
10. When the last agent login ID is added to the desired agent group, close the window.

Deleting Agents from an Agent Group

To delete agents from an agent group, do the following steps:

1. Select **Dictionary** from the **Commands** menu, or select the Dictionary button  on the toolbar.
2. Select **Agent Groups** from the Operations tab.
3. Select the ACD for the agent group.
4. Select OK.

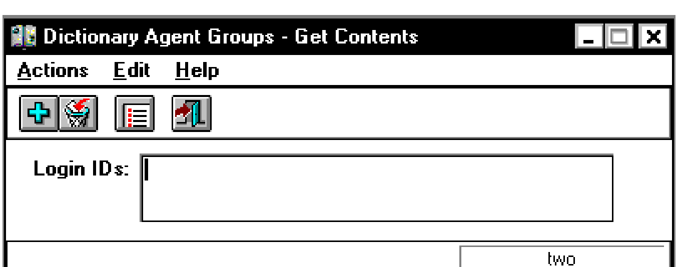
   The Agent Groups input window displays:

   Type the name of the agent group from which you want to delete agents.

5. Select **Find one** from the **Actions** menu, or select the Find One button  on the toolbar.
6. Select **Get contents** from the **Actions** menu, or select the Get Contents button  on the toolbar.

   The Agent Groups — Get Contents window displays.

7. Type the login IDs of the agents you want to delete from this agent group in the text box.
8. Select **Delete** from the **Actions** menu, or select the Delete button  on the toolbar.
9. When the last agent login ID is deleted from the desired agent group, close the window.

7

Exceptions...

Introduction

This chapter teaches you how to use the Operations and Reports tabs in the **Exceptions** command. It also gives you information on performing tasks that are specific to the **Exceptions** command.

The sections in this chapter are as follows:

- About **Exceptions**
- Starting **Exceptions**
- **Exceptions** Operations Tab
- **Exceptions** Operations Input Windows
- **Exceptions** Reports Tab
- **Exceptions** Report Input Windows
- Setting **Exceptions**
- About the Real-time **Exception** Log

How **Exceptions** works in CMS is not described in detail in this chapter. For more information on **Exceptions** operations and reports, please refer to the "Exceptions" chapter in the *CentreVu™ CMS R3V5 Administration* (585-215-820) document.

About Exceptions

Note The exception conditions which you set in the **Exceptions** command are different from those which you define using report threshold highlights. For more information on report threshold highlights, see the “Setting Report Threshold Highlights” section of Chapter 5, “Reports.”

The **Exceptions** feature allows you to administer time- or count-based thresholds and to be alerted when times or counts exceed or fall below those thresholds. This allows monitoring “by exception,” by being alerted when something is not behaving as expected.

Note You can define exception conditions and generate reports for VDNs and vectors only if you have purchased the Vectoring feature.

Use the **Exceptions** command to do the following actions:

- Define exception conditions for ACD activity for which you want notification. Activities may include agents, splits or skills, trunks or trunk groups, vectors, and VDNs. You do this using the Exception Operation windows.
- Generate reports on agent, split or skill, trunk and trunk group, vector, VDN, malicious call trace, and data collection exceptions.
- Run the Real-time Exception Log.

Note The Real-time Exception Log is located under the Operations tab, not the Reports tab. In standard CMS, the log is a separate submenu item.

Starting Exceptions

To select any exceptions item in Supervisor do the following steps:

1. Choose **Exceptions** from the **Commands** menu.

   OR

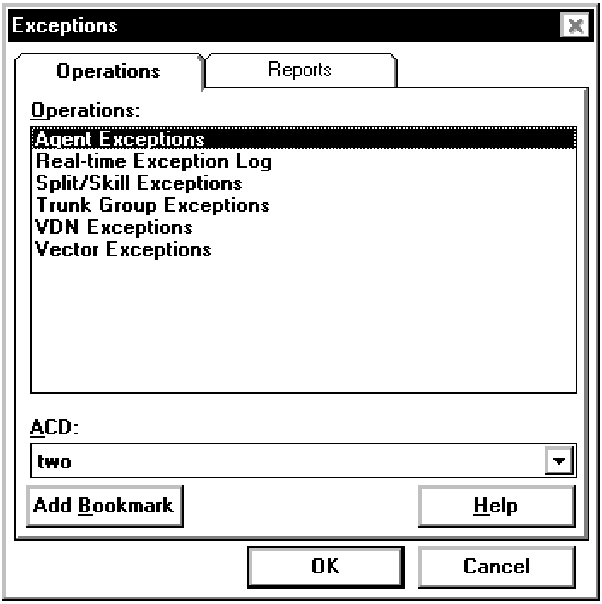
   Select the Exceptions button  on the toolbar.

2. The **Exceptions** window appears. You will see the following tabs to choose from:

   - Operations
   - Reports.

Exceptions Operations Tab

The following graphic shows the **Exceptions** Operations available in Supervisor.



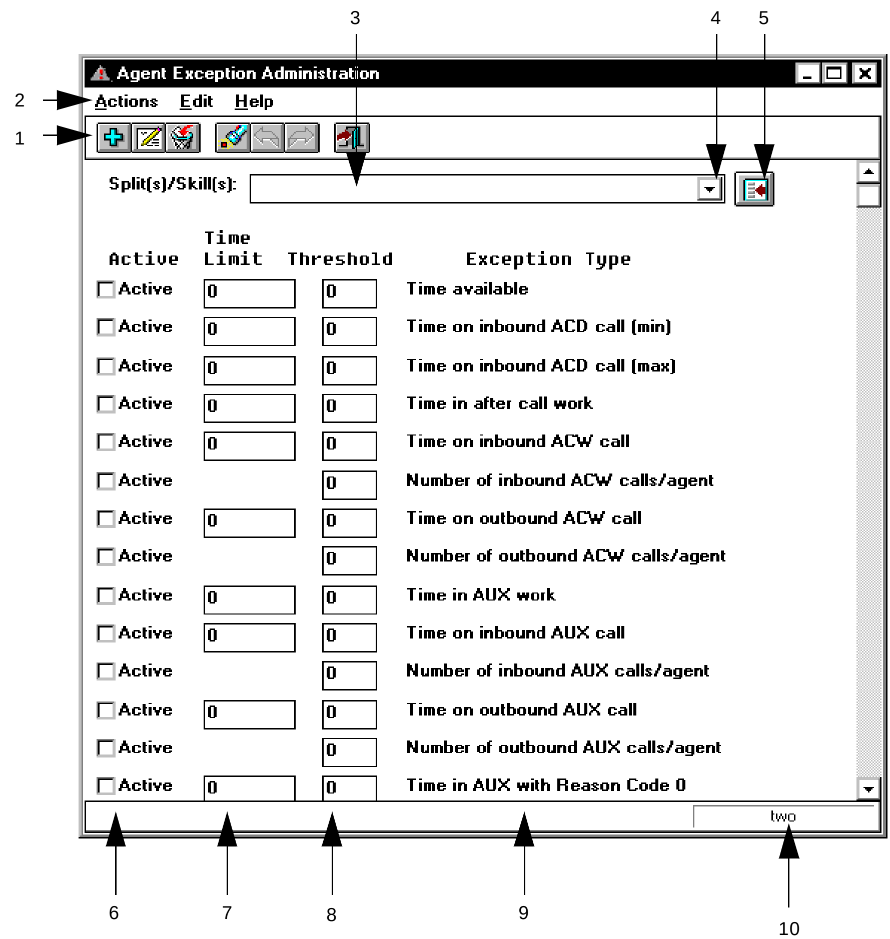
You may choose any of the following categories from the **Exceptions** Operations tab:.

Note For more detail on the following **Exceptions** categories, please refer to the "Exceptions" chapter in the *CentreVu™ CMS R3V5 Administration* (585-215-820) document.

- **Agent Exceptions** — use to define agent exceptions.
- **Real-time Exception Log** — use to list the exceptions as they occur.
- **Split/Skill Exceptions** — use to define split / skill exceptions.
- **Trunk Group Exceptions** — use to define trunk group exceptions.
- **VDN Exceptions** — use to define VDN exceptions.
- **Vector Exceptions** — use to define vector exceptions.

Exceptions Operations Input Windows

When you select an item from the **Exceptions** Operations list, an input window displays. Below is an example of one of the input windows that you will see.



1. Toolbar Action Buttons
2. Menu Bar
3. Input Field
4. History List
5. Browse Button
6. Exception Active Box
7. Exception Time Limit Field
8. Exception Threshold Field
9. Exception Type
10. Current ACD

The input window that displays is dependent on the operation you selected.

- **Menu Bar** — includes menus for CMS **Actions** (Add, Delete, Modify, Find One, Next, Previous, List All, and Exit), **Edit** options (Cut, Copy, Paste, and Clear All), and Supervisor **Help**.
- **Toolbar Action Buttons** — let you perform CMS actions (Add, Delete, Modify, Find One, Next, Previous, List All, and Exit) by clicking on a button. See Chapter 3, “Operations Basics,” for more information on the action buttons.
- **Input Fields** — are text boxes where you type in the information needed to complete the CMS action.
- **History List** — displays a list of inputs you have previously used in the input field.
- **Browse Button** — lets you browse through all possible items for the input field.
- **Exception Active** — enables / disables tracking of this particular exception.
- **Exception Time Limit** — sets the time limit which an activity must exceed or fail to meet before being considered an exception.
- **Exception Threshold** — sets the number of times an activity can exceed / fall below the time limit (or, if no time limit is associated, the number of times the activity can occur) before being counted as an exception.
- **Exception Type** — defines the exception.
- **Current ACD** — displays the ACD for which you are setting exceptions.

Setting Exceptions Conditions

You can set exception conditions for agents, splits/skills, trunk groups, VDNs, and vectors. By default, no exceptions are set.

To set exception conditions, do the following steps:

1. Select **Exceptions** from the **Commands** menu, or select the Exceptions button on the toolbar.
2. Select the type of exceptions (agent, split/skill, trunk group, VDN, or vector) you want to set from the Operations tab.

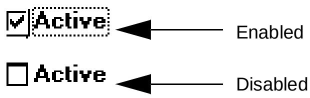
   The Exception Administration window appropriate to the type you selected displays.
3. Type in the name or use the Browse button or history list to select the item for which you want to set exceptions.
4. Select **Find one** from the **Actions** menu, select the Find one button on the toolbar, or press Ctrl+F to display exceptions information for the selected item (agent, split/skill, trunk group, VDN, or vector).

   No exceptions are active (unless previously set).
5. Use the scroll bar to page through all of the exceptions administration screens (for this item).

Note You can set exceptions for more than one item at a time. To do this, use the Browse button to list all available split/skills, agents, trunk groups, VDNs, or vectors. See the “Using the Browse Button” section in Chapter 2, “Supervisor Basics,” for more information on selecting multiple items using the Browse button.

Chapter 7

6. Select the exceptions for which you want to be notified by clicking in the Active box(es) to enable the check box.



7. Set the Time Limit (if applicable) for the exceptions of which you will be notified. The time limit is the amount of time that must pass before occurrences are counted against the threshold limit.

8. Set the Threshold for the exceptions of which you will be notified. The threshold is the number of acceptable occurrences. So, if you set the threshold to ten, then that particular exception can occur ten times before you will be notified. On the eleventh occurrence, you will receive an exceptions notification.

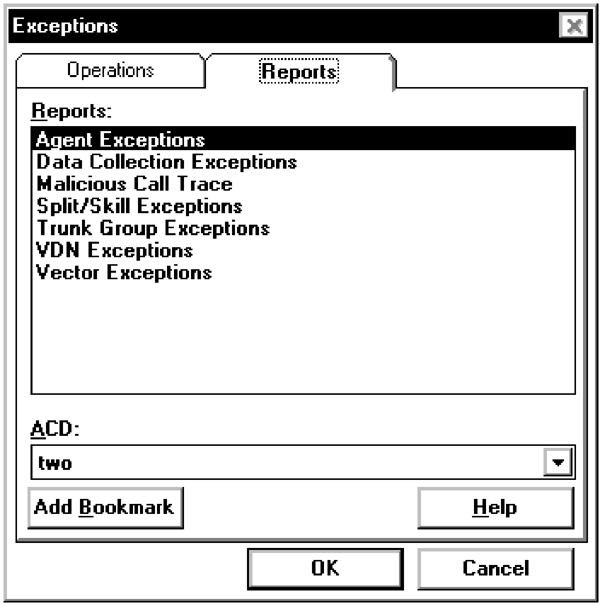
9. When you are done setting the thresholds, select **Add** from the **Actions** menu, select the Add button  on the toolbar, or press Ctrl+A to add the changes to CMS.

Note

If you are setting exceptions for an entity that has already had exceptions set, use the **Modify** action instead of **Add**.

Exceptions Reports Tab

The following graphic shows the **Exceptions** Reports available in Supervisor.



You may choose any of the following categories from the Reports tab.

Note For more detail on the following **Exceptions** categories, please refer to the "Exceptions" chapter of the *CentreVu*™ *CMS R3V5 Administration* (585-215-820) document.

- **Agent Exceptions** — generates a report of agent exceptions.
- **Data Collection Exceptions** — generates a report of data collection exceptions.
- **Malicious Call Trace** — generates a report of malicious call trace exceptions.

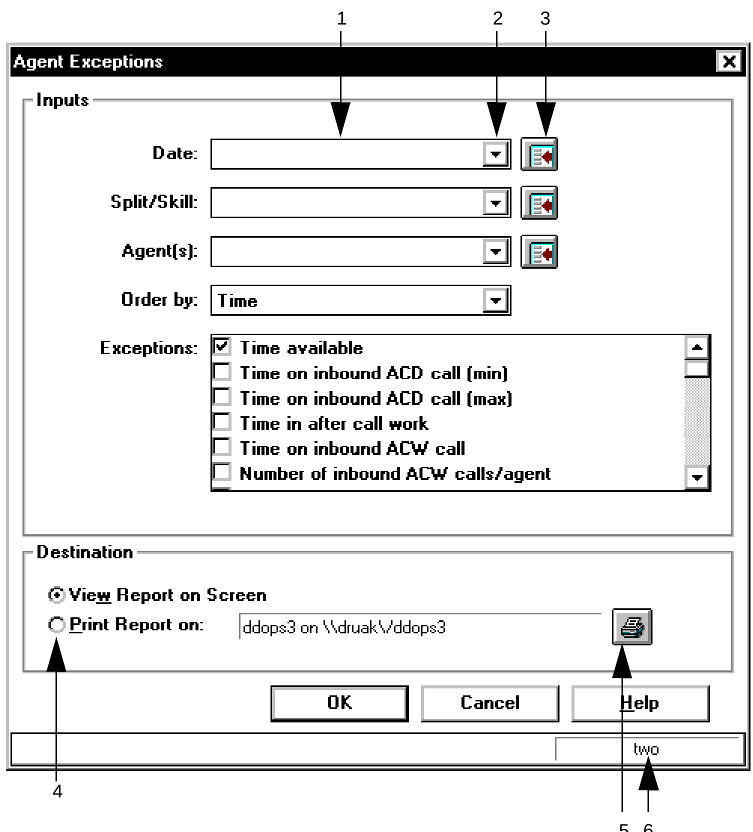
- **Split/Skill Exceptions** — generates a report of split/skill exceptions.
- **Trunk Group Exceptions** — generates a report of trunk group exceptions.
- **VDN Exceptions** — generates a report of VDN exceptions.
- **Vector Exceptions** — generates a report of vector exceptions.

Exceptions Report Input Windows

To run an exceptions report, do the following steps:

1. Select **Exceptions** from the **Commands** menu, or select the Exceptions button on the toolbar.
2. Select the Reports tab.
3. Select the type of exceptions report you want to run.

   The report input window displays. Below is an example of an input window.



1. Input Fields
2. History List
3. Browse Button
3. Destination
4. Print Setup Button
5. Current ACD

The input window that displays is dependent on the report you selected.

4. Complete the input fields.
   - **Input Fields** — are text boxes where you type in the information needed to complete the CMS action.
   - **History List** — displays a list of inputs you have previously used in the input field.
   - **Browse Button** — lets you browse through all possible items for the input field.
   - **Destination** — allows you to select where the report is produced (on screen or printed).
   - **Print Setup Button**— allows you to select the printer on which the report prints. For more information on print setup, see the “Using Print Setup” section in Chapter 4, “Reports Basics.”
   - **Current ACD** — displays the ACD for which you are setting exceptions.
5. The Exceptions check box list is where you select the exceptions you want to appear on the report. Enable the check box if you want an exception to appear on the report. Disable the check box if you do not want an exception on the report.
6. Select the report destination.
7. Select OK.

   The report runs.

About the Real-time Exception Log

The Real-Time Exception Log displays exception records for the last ten exceptions. The log lists exception records in chronological order, with the oldest exception listed first.

The Real-time Exception Log holds up to 100 exception records. As each new exception occurs, *CentreVu* CMS adds a new record to the log. If the log already contains 100 records, *CentreVu* CMS deletes the oldest exception record from the log at the same time that it adds the new exception record.

The log simultaneously displays exception records for all elements on the ACD or ACDs for which you have exceptions permissions, regardless of whether the exceptions involve agents, splits or skills, trunk groups, VDNs, or vectors.

You can use the Real-time Exceptions Log in two ways:

- Access the log periodically, or whenever you get notification of an exception, to see exactly what has happened.
- Maintain the log as an open window so you can monitor exceptions as they occur.

Each exception record in the Real-time Exception Log gives you the following information:

- The date and time the exception occurred.
- The ACD name for which the exception occurred.
- The specific ACD element, such as a specific agent, split/skill, or VDN that was involved in the exception. If you have defined names in the Dictionary subsystem, the names display. These names may be truncated if they are longer than the space allowed in the exception record. Otherwise, numeric identifiers display.
- The conditions you set up for exception checking in the associated Exceptions Administration window.

The record tells you only that an activity has fallen outside of the exception conditions you set. Thus, for a peg count exception, the exception record shows the occurrence threshold you set, even though the actual number of occurrences may be substantially greater. For a timed exception, the exception record shows the time limit you set, not the actual duration of an occurrence.

8

ACD Administration...

Introduction

This chapter teaches you how to use the Operations and Reports tabs in the **ACD Administration** command. It also teaches you how to perform tasks that are specific to the **ACD Administration** command.

The sections in this chapter are as follows:

- About **ACD Administration**
- Starting **ACD Administration**
- **ACD Administration** Operations Tab
- **ACD Administration** Operations Input Windows
- **ACD Administration** Reports Tab
- **ACD Administration** Reports Input Windows
- Activating an Agent Trace
- Listing Agents Traced
- Adding or Deleting Call Work Codes
- Changing an Agent's Skills

- Multi-Agent Skill Change
- Changing VDN Skill Preferences
- Change Extension Split Assignments
- Moving Extensions Between Splits
- Setting Split Parameters
- Setting Up Call Profiles
- Viewing Trunk Group Assignments
- Changing Trunk Group Assignments
- Changing VDN Assignments.

How **ACD Administration** works in *CentreVu* CMS is not described in detail in this chapter. For more information on **ACD Administration** and Configuration Reports, please refer to the "ACD Administration" chapter in the *CentreVu*™ *CMS Administration* (585-215-820) document.

About ACD Administration

Note The capabilities available in **ACD Administration** depend on which switch you have and on what user permissions have been assigned to you by your CMS Administrator. The capabilities on your CMS are reflected in the menu items included in ACD Administration.

CentreVu CMS and the *CentreVu* Supervisor application are primarily used to collect information about ACD-related activities from the switch, store the information, and produce real-time and historical reports. However, you can also use Supervisor to view, add, delete, or modify ACD-related parameters on the switch. The following are some of the ACD administration tasks you can perform from Supervisor, assuming your switch supports the related features:

- Add agents to, remove agents from, or move agents (extensions) between splits or skills.
- Change an agent's assigned skills or change one skill for as many as 32 agents simultaneously.
- Start or stop an agent trace or list the agents being traced.
- View, change, or run a report that lists trunk group-to-VDN or VDN-to-vector assignments.
- Set an acceptable service level, which is used to track answered and abandoned calls, for a split, skill, or VDN.

The CMS Vector Contents capability is not available through Supervisor. Use the *CentreVu* Terminal Emulator to perform Vector Contents actions.

Starting ACD Administration

To select any **ACD Administration** item in Supervisor, do the following steps:

1. Select **ACD Administration** from the **Commands** menu.

   OR

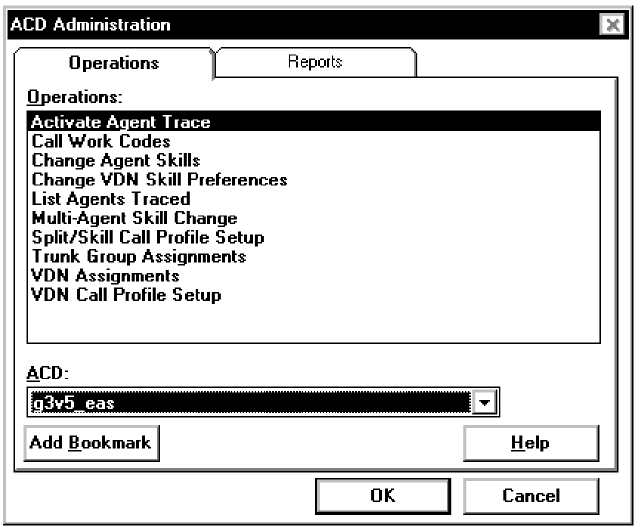
   Select the ACD Administration button  on the toolbar.

2. The **ACD Administration** selector window appears. You will see the following tabs to choose from:

   - Operations
   - Reports.

ACD Administration Operations Tab — Switches with EAS

If you have the DEFINITY® Enterprise Communications Server (ECS) Release 5 with the Expert Agent Selection (EAS) feature, or the Generic 3 Version 4 switch with EAS, then the **ACD Administration** Operations tab displays the following operations:



Note The items that appear in the Operations list box vary depending on the ACD you choose and the features that are purchased and enabled on the ECS or the switch.

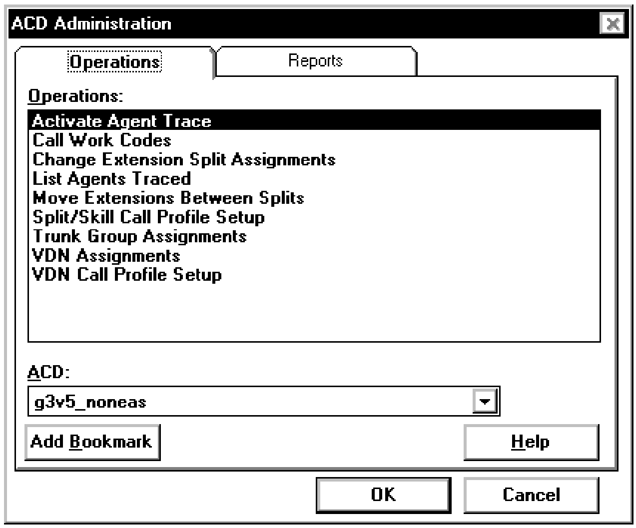
For more detail on the **ACD Administration** operation categories, please refer to the "ACD Administration" chapter of the *CentreVu*™ *CMS Administration* (585-215-820) document.

- **Activate Agent Trace** — starts or stops *CentreVu* CMS tracing of agent activities, including agent state changes.
- **Call Work Codes** — adds, deletes, or lists the Call Work Codes for which *CentreVu* CMS collects data.

- **Change Agent Skills** — lets you change an agent's assigned skill set. This operation is available only if you have the ECS with EAS or the Generic 3 Version 2 or later switch with the EAS feature.
- **Change VDN Skill Preferences** — changes the first, second, and third VDN skill preferences for a list of VDNs. You can also list the currently assigned skill preferences for VDNs, or list all the VDNs that currently have the specified skill preference assigned.
- **List Agents Traced** — lists the agents and dates for which agent trace data are available for the current ACD.
- **Multi-Agent Skill Change** — lets you change one skill for as many as 32 agents. This operation is available only if you have the ECS with EAS or the Generic 3 Version 4 switch with the EAS feature.
- **Split/Skill Call Profile Setup** — sets a target *acceptable service level* (time limit in seconds) for calls to wait in queue before being answered and also allows you to define the service level increments for Split/Skill Call Profile reports and graphs. You can then use the Split/Skill Call Profile reports to see how many calls were either answered or abandoned within each increment.
- **Trunk Group Assignments** — lets you view trunk-group-to-VDN assignments.
- **VDN Assignments** — changes VDN-to-vector assignments.
- **VDN Call Profile Setup** — sets up a VDN call profile and defines acceptable service levels (time limits in seconds) and service level increments (ranges of wait time) for VDNs.

ACD Administration Operations Tab — Switches Without EAS

If you have the ECS without EAS or a switch without EAS, the **ACD Administration** Operations tab displays the following operations:



Note The items that appear in the Operations list box vary depending on the ACD you choose and the features that are purchased and enabled on the ECS or switch. For example, items related to VDNs or vectors appear only if the ECS or switch has the Call Vectoring feature. Also, if you have the Generic 2 switch with no vectoring, then the Split Parameters operation is available.

For more detail on the **ACD Administration** operation categories, please refer to the “ACD Administration” chapter of the *CentreVu*™ *CMS Administration* (585-215-820) document.

- **Activate Agent Trace** — starts or stops *CentreVu* CMS tracing of agent activities, including agent state changes.

- **Call Work Codes** — adds, deletes, or lists the Call Work Codes for which *CentreVu* CMS collects data.
- **Change Extension Split Assignments** — lists currently assigned splits for an extension and lets you change the assigned splits.
- **List Agents Traced** — lists the agents and dates for which agent trace data are available for the current ACD.
- **Move Extensions Between Splits** — lists current extension split assignments and lets you move measured extensions between splits.
- **Split Parameters** — lists and allows you to modify the delay time for prerecorded announcements and intraflow for ACD splits. This operation is available only if you have the Generic 2 switch with no Call Vectoring feature.
- **Split/Skill Call Profile Setup** — sets a target *acceptable service level* (time limit in seconds) for calls to wait in queue before being answered and also to define the service level increments for Split / Skill Call Profile Reports and graphs. You can then use the Split / Skill Call Profile reports to see how many calls were either answered or abandoned within each increment.
- **Trunk Group Assignments** — without vectoring, lets you view trunk group assignments (all switches) and move trunk groups from one split to another (Generic 2 and System 85 switches only).

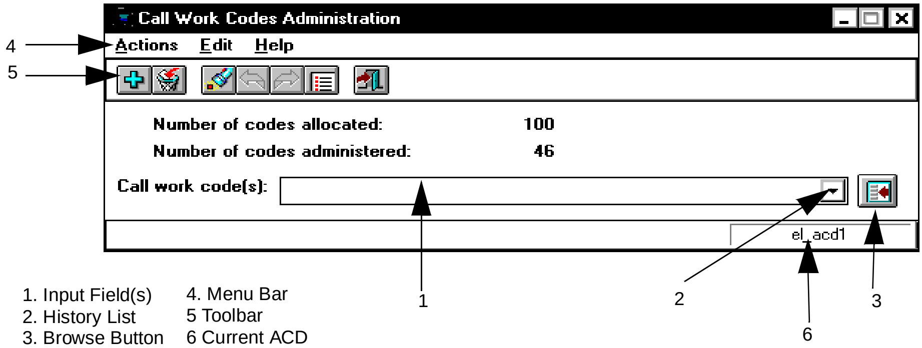
  With vectoring, lets you view (all switches) and change (Generic 2 and System 85 switches only) trunk group-to-VDN assignments. You assign automatic-in trunk groups to VDNs so that ACD calls arriving on those trunk groups can be linked to vectors. From vector processing, the calls are ultimately routed to other destinations—primarily splits.

Note If you have purchased and enabled the Call Vectoring feature, then the following operations are also available.

- **VDN Assignments** — changes VDN-to-vector assignments.
- **VDN Call Profile Setup** — sets up a VDN call profile and defines acceptable service levels (wait time) and service level increments for VDNs.

ACD Administration Operations Input Windows

When you select an item from the **ACD Administration** Operations list, an input window displays. Below is an example of one of the input windows that you will see.



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

The input window that displays depends on the operation you selected.

Note If you select Change Agent Skills, the first input window requests only an agent name and then an interactive input window displays for you to change the skills. See the "Changing an Agent's Skills" section in this chapter for more information.

If you select Multi-Agent Skill Change, an interactive input window displays in which you make the changes. See the "Multi-Agent Skill Change" section in this chapter for more information.

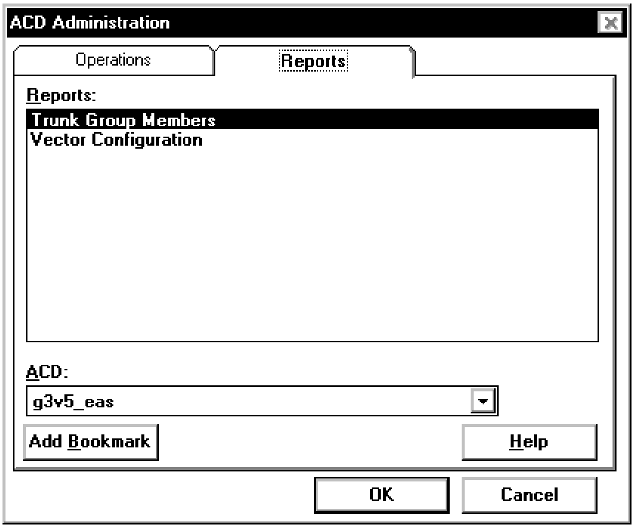
If you select Change Extension Split Assignments, the first input window requests only an extension number and then an interactive window displays for you to change the assignments. See the "Change Extension Split Assignments" section in this chapter for more information.

If you select Move Extensions Between Splits, an interactive input window displays for you to make the changes. See the "Moving Extensions Between Splits" section in this chapter for more information.

- **Menu Bar** — includes pull-down menus for *CentreVu* CMS **Actions** (Add, Delete, Find One, Next, Previous, List All, and Exit), **Edit** options (Cut, Copy, Paste, and Clear All), and *CentreVu* Supervisor **Help**.
- **Toolbar Action Buttons** — let you perform *CentreVu* CMS actions (Add, Delete, Find One, Next, Previous, List All, and Exit). See Chapter 3, “Operations Basics,” for more information on action buttons.
- **Input Fields** — are text boxes where you type in the information needed to complete the *CentreVu* CMS action.
- **History List** — displays a pull-down list of inputs you have previously used in an input field.
- **Browse Button** — lets you browse through all possible items for the input field. See Chapter 2, “Supervisor Basics,” for more information on using the Browse Button.
- **Current ACD** — displays the ACD for which you are performing **ACD Administration**.

ACD Administration Reports Tab — Switches with EAS

From the Reports tab, you can choose any of the following reports to run in **ACD Administration**:



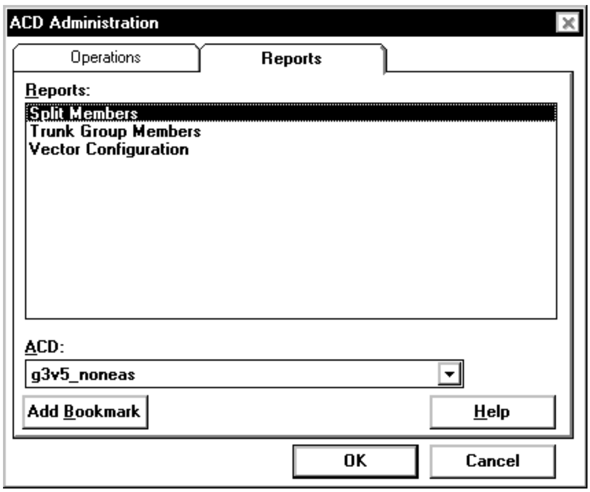
Note The items that appear in the Reports list box vary depending on the ACD you choose and the features that are purchased and enabled on the ECS or switch.

For more detail on the following **ACD Administration** reports, please refer to the "ACD Administration" chapter of the *CentreVu*™ *CMS Administration* (585-215-820) document.

- **Trunk Group Members** — shows trunk group members and their equipment locations for a particular trunk group. This report helps you quickly find a trunk's location.
- **Vector Configuration** — lists the trunk groups and VDNs associated with the specified vector.

ACD Administration Reports Tab — Switches Without EAS

From the Reports tab, you can choose any of the following reports to run in **ACD Administration**:



Note The items that appear in the Reports list box vary depending on the ACD you choose and the features that are purchased and enabled on the ECS or switch. For example, items related to VDNs or vectors appear only if the switch has the Call Vectoring feature.

For more detail on the following **ACD Administration** reports, please refer to the “ACD Administration” chapter of the *CentreVu*™ *CMS Administration* (585-215-820) document.

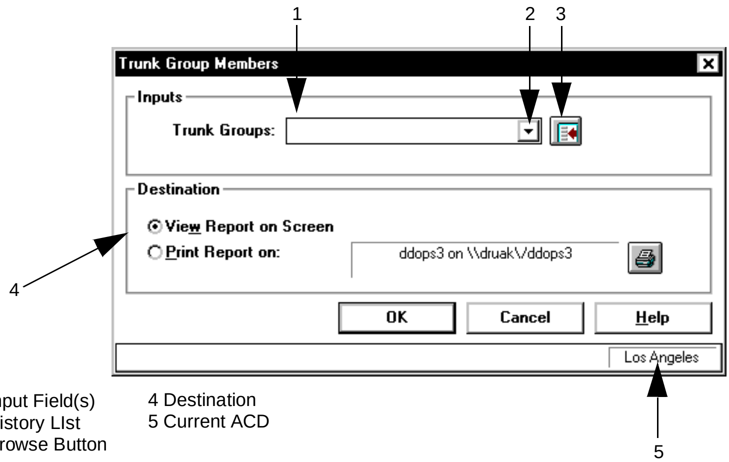
- **Split Members** — lists the selected splits in numerical order, each split's assigned name, and the extensions that are assigned to the split.
- **Trunk Group Members** — shows trunk group members and their equipment locations for a particular trunk group. This report helps you quickly find a trunk's location.

Note If you have purchased and enabled the Call Vectoring feature, then the following report is also available.

- **Vector Configuration** — lists the trunk groups and VDNs associated with the specified vector.

ACD Administration Reports Input Windows

When you select an item from the **ACD Administration** Reports list, an input window displays. Below is an example of one of the input windows that you will see.



1 Input Field(s)
2 History LIst
3 Browse Button
4 Destination
5 Current ACD

The input window that displays is dependent on the report you selected.

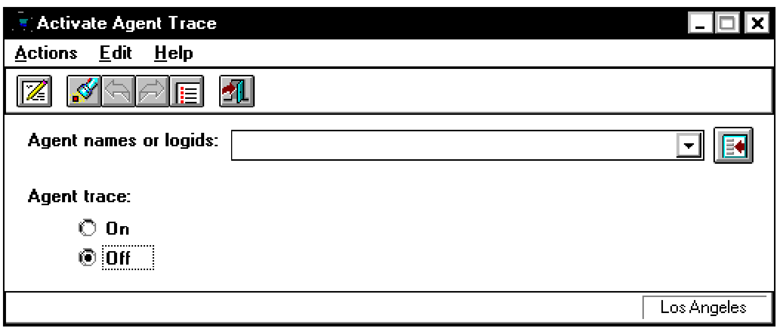
- **Input Fields** — are text box(es) where you type in the information needed to run the report.
- **History List** — displays a pull-down list of inputs you have previously used in an input field.
- **Browse Button** — lets you browse through all possible items for the input field. See Chapter 2, "Supervisor Basics," for more information on using the Browse Button.
- **Destination** — allows you to select where the report is produced (on screen or printed).
- **Current ACD** — displays the ACD for which you are running this **ACD Administration** report.

Activating an Agent Trace

To start or stop an agent trace, do the following steps:

1. Select **ACD Administration** from the **Commands** menu, or select the ACD Administration button on the toolbar.
2. Choose the ACD for which you want to start or stop an agent trace.
3. Select **Activate Agent Trace** from the Operations tab.
4. Select OK.

   The Activate Agent Trace window appears.



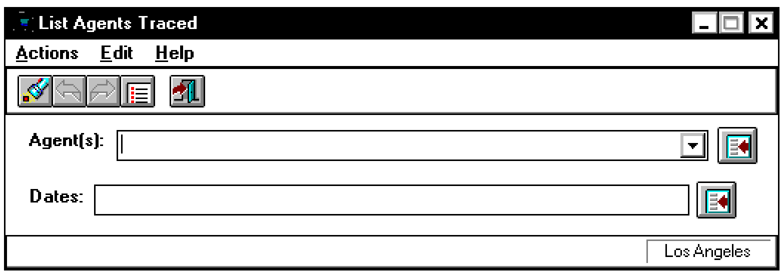
5. From the Agent names or logids list box, enter or select the name or login ID of the agent for whom you want to start or stop a trace.
6. To start an agent trace, select the On option. To stop an agent trace, select the Off option.
7. Select **Modify** from the **Actions** menu, select the Modify button on the toolbar, or press Ctrl+M.

Listing Agents Traced

To list agents who are being traced, do the following steps:

1. Select **ACD Administration** from the **Commands** menu, or select the ACD Administration button on the toolbar.
2. Select the ACD that the agent traces reside on from the ACD list box.
3. Choose **List Agents Traced** from the Operations list box.
4. Select OK.

   The List Agents Traced input window displays.



5. Type in the names or numbers of the agents you want to list, or use the Browse button or drop-down list to select agents to list. Leave this field blank to list all agents for which there is trace data.
6. Type in the date(s) you want to include on the list, or use the Browse button to select the date(s). Leave this field blank to list all dates for which there is trace data.
7. Select **List all** from the **Actions** menu or select the List all button on the toolbar to list information on all the agents and dates you entered.

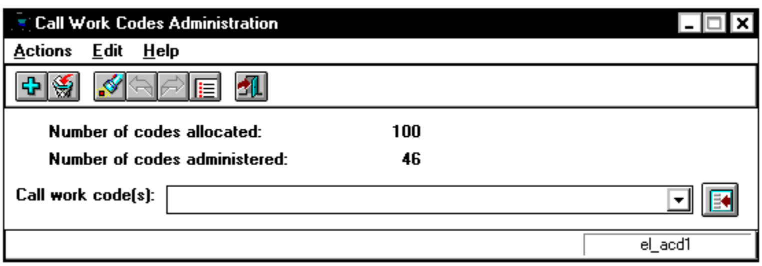
   Select **Find one** from the **Actions** menu, select the Find one button on the toolbar, or press Ctrl+F to list the first agent's information.

Adding or Deleting Call Work Codes

To add or delete Call Work Codes (CWCs), do the following steps:

1. Select **ACD Administration** from the **Commands** menu, or select the ACD Administration button on the toolbar.
2. Select the ACD for which you want to add or delete CWCs from the ACD list box.
3. Select **Call Work Codes** from the Operations list box.
4. Select OK.

   The Call Work Codes window appears.



5. In the Call work code(s) text box, enter the CWC(s) you want to add or delete, or use the Browse button to choose from a list of CWCs.

Note If the number displayed in the Number of codes allocated: field is the same as the number displayed in the Number of codes administered: field, you **cannot** add more CWCs until you increase the amount of disk space allocated for storing CWCs. See the Data Storage Allocation section of the “System Setup” chapter in the *CentreVu* ™ *CMS Administration* (585-215-820) document for information about allocating more space.

6. To add CWCs, select **Add** from the **Actions** menu or select the Add button on the toolbar.

   To delete CWCs, select **Delete** from the **Actions** menu or select the Delete button on the toolbar.

Changing an Agent's Skills

Note The Change Agent Skills operation is available only when the EAS feature has been purchased and enabled on the ECS or the switch.

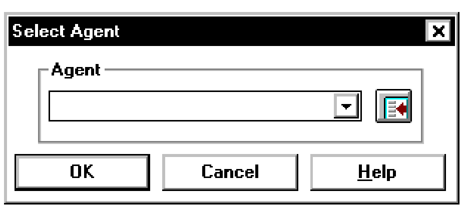
If you have the ECS or the Generic 3 Version 4 switch, then agents do not have to log out for the skill changes to take effect. (Changes may be pending while the agent is on the phone or in ACW.)

The Change Agent Skills operation works differently than most **ACD Administration** operations.

To change the skills and the associated skill level/type, do the following steps:

1. Select **ACD Administration** from the **Commands** menu, or select the ACD Administration button on the toolbar.
2. Select the ACD for which you want to change agent skills from the ACD list box.
3. Choose **Change Agent Skills** from the Operations list box.
4. Select OK.

   The Select Agent window appears.



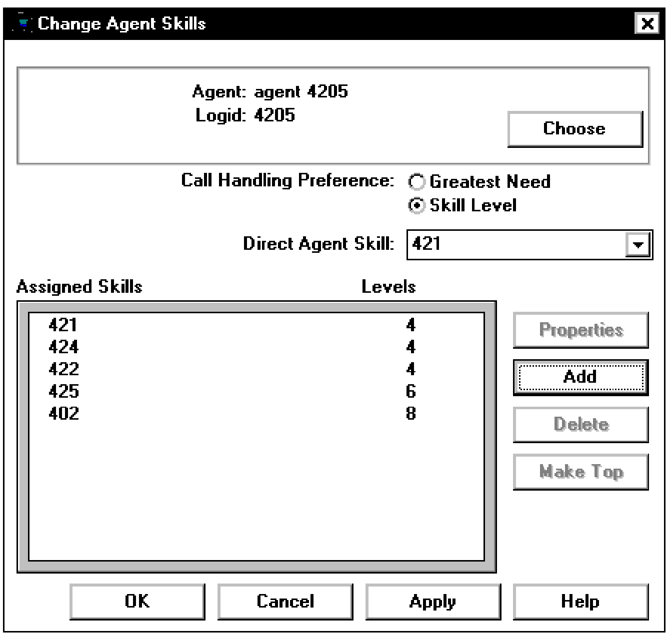
5. Enter the agent login ID or name or use the Browse button to choose from a list of agents. You can also select an agent to change skills

by highlighting the agent name in a running report, and then selecting "Change Agent Skills" from the right mouse button pop-up menu.

Note You can do no other activity outside of the Select Agent window until you choose either the OK or Cancel button.

6. Select OK.

   The Change Agent Skills window displays. The example shown here is for the ECS. If you have an earlier switch, your window will be different.



   The skills for the agent you named in the previous window, along with the associated skill levels, are displayed in the Assigned Skills box.

Note Skill names are shown for the skills that have been named in the Dictionary. Skill numbers are shown for the skills that have not been named in the Dictionary.

7. Change the skill assignments for the selected agent(s), as follows:

   - If you have the ECS and want to change the way in which it is decided which calls an agent gets first, select a different **Call Handling Preference**. The concept of “Top Skill” and the levels associated with skills are significant only for agents whose call handling preference is “Skill Level.” For more information on the difference between handling calls based on “Greatest Need” and “Skill Level,” see the EAS appendix in the *CentreVu* ™ *CMS Administration* (585-215-820) document.
   - If you have the ECS and want to change the skill to be used to queue an agent’s direct agent calls, select the new **Direct Agent Skill** from the drop-down list of skills.
   - If you want to change the level or type associated with an already-assigned skill, do the following steps:

     A. In the Assigned Skill list, select the skill for which you want to change skill level. (If you have the ECS, then an arrow icon to the left of the skill indicates the agent’s “Top Skill” assignment.)

     B. If you have the ECS, click the Properties button to display the Agent Skill Properties window. The current skill level for this assigned skill is listed on the right. Move the slide control at the bottom of the window to the left (for more skilled) or right (for less skilled) to change the skill level associated with this agent’s assigned skill, or type in a new value for the skill level in the Skill Level: field.

        If you have the Generic 3 Version 2, 3, or 4 switch, then select Primary or Secondary for each skill in the Assigned Skills box, as appropriate. You may also change the order of the assigned skills by clicking a skill and selecting Up or Down.

     C. Select OK (or Cancel to ignore this change to skill level / type).
   - If you want to change which skills are assigned to the selected agent(s), do the following steps:

     A. Select the Assigned Skill that you no longer want to be assigned to the agent(s).

B. If you have the ECS, click on the Delete button. (Note that if an agent has only one assigned skill, this skill cannot be deleted.)

   If you have the Generic 3 Version 2, 3, or 4 switch, click on the Remove button.

C. If you have the ECS and you want to assign one or more new skill(s), click on the Add button. In the Available Skills list, select the skill(s) you want to assign to the agent(s), and the Skill Level for these new skills.
   If you have the Generic 3 Version 2, 3, or 4 switch, then in the Available Skills list, select the skill(s) you want to assign to the agent(s), and click on the Add button. Then select Primary or Secondary for each skill in the Assigned Skills box, as appropriate.

D. If you have the ECS, click on the OK button in the Available Skills window. If you have an earlier switch, go to step 8.

- If you have the ECS and want to make an assigned skill the “Top Skill” for this agent (which is only significant if the agent’s Call Handling Preference is based on Skill Level, and not on Greatest Need), then do the following:

  A. Select the skill.

  B. Click on the Make Top button.

8. When you are done updating the skills for this agent, select Apply.

   OR

   If this is the only agent for whom you are updating skills, select OK.

   (Note that no changes shown on this window are submitted to the *CentreVu* CMS server until the Apply or OK button on the “Change Agent Skills” window is selected.) If a move is pending, then you are notified that the operation will not occur until the pending conditions are resolved.

9. When you select Apply and the change is successfully made, a confirmation box displays, “Operation Successful.” Select OK.

   The Change Agent Skills window displays again.

   OR

When you select OK, the “Change Agent Skills” window closes after “Operation Successful” confirmation.

10. If you selected Apply and are done making changes, select OK, or select Cancel to cancel any changes you have made since the last time you selected Apply or OK.

    If you would like to make skill assignment changes for other agents:

11. Select Choose to select another agent.
12. Repeat steps 5 through 9.

Multi-Agent Skill Change

Note The Multi-Agent Skill Change operation is available only when the EAS feature has been purchased and enabled on the ECS or the Generic 3 Version 4 switch.

If you have the ECS or the Generic 3 Version 4 switch, agents do not need to log out for the skill changes to take effect. (Changes may be pending while the agent is on the phone or in ACW.)

The Multi-Agent Skill Change operation works differently than most **ACD Administration** operations.

Use the Multi-Agent Skill Change window to change one skill for as many as 32 agents at a time. You can also specify the associated skill level (1 to 16 for the ECS) or type (primary or secondary for other switches) of a skill that is added or modified.

In addition to changing the agents assigned to skills, you can run reports from within the Multi-Agent Skill Change window. For example, you can double click on an agent name/number in a Skill window or the Agent List window to run the Real-Time Agent Graphical Information report for the selected agent. You can also highlight an agent and then select the Real-Time or Integrated Agent Graphical Information item from the Agent menu to run the selected report.

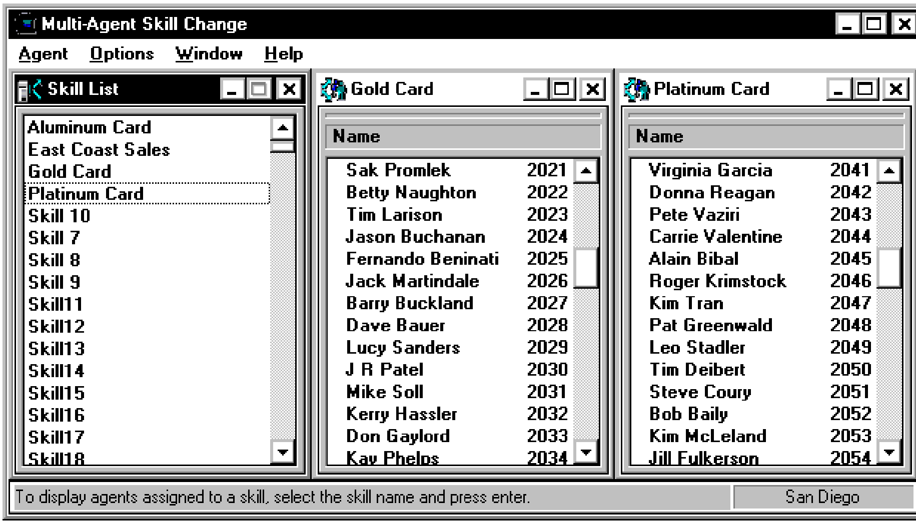
If you need to make several changes to one agent's skill level assignments, you should highlight the agent in a Skill or Agent List window (or running report) and then select Change Agent Skills from the Agent menu (or right mouse button pop-up menu in reports). For more information, see the section on "Changing an Agent's Skills."

To change one skill for multiple agents, do the following steps:

1. Select **ACD Administration** from the **Commands** menu, or select the ACD Administration button  on the toolbar.
2. From the ACD list box, select the ACD for which you want to change agents' skills.
3. From the Operations list box, choose **Multi-Agent Skill Change**.

4. Select OK.

   The Multi-Agent Skill Change window appears.



The left-hand window within the Multi-Agent Skill Change Window is a list of all of the skills that are available on this ACD. To display agents assigned to a skill, either double click on the skill name or select the skill name and press enter. (The skills “customer service” and “shipping” are shown here.) To sort the agents differently, use the **Options** menu.

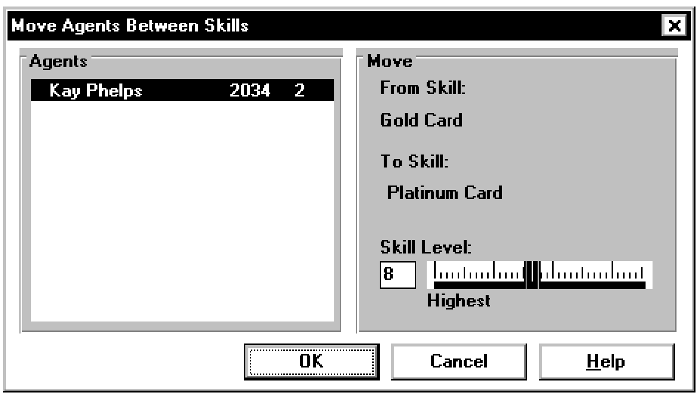
5. To move agents from skill to skill, or add agents in an existing skill to another skill, you can do the following:

   - Click on one agent name/number, drag it to the skill you want to move the agent to, and let go of the mouse button. If you hold down the Ctrl key while dragging and dropping the agent name, then this agent will be added instead of moved to the destination skill.

   - Hold down the Ctrl key and click to select multiple agent names (as many as 32) in one skill, then drag them to the new skill and let go of the mouse button. If you hold down the Ctrl key while dragging and dropping the agents, they will be added instead of moved.

- Hold down the Shift key and click on two agent names to select the range of agents listed between the two you selected, then drag the agents (as many as 32) to the new skill and let go of the mouse button. If you held down the Ctrl key while dragging and dropping the agents to the destination skill, then they will be added instead of moved to that skill.

When you let go of the mouse button and drop the agent(s), a confirmation window displays. The following example is for moving agents between skills:



The agent(s) you moved are listed on the left-hand side of the window. The right-hand side shows the from-to skill information.

6. If you have the ECS and want to change the Skill Level that each agent you moved/added will have associated with this new skill, move the slide control at the bottom of the window to the left (for more skilled) or right (for less skilled), or type in a value in the Skill Level: field, as appropriate.

   If you have the Generic 3 Version 2, 3, or 4 switch, then select Primary or Secondary to associate with this new skill, as appropriate.

7. If the information is correct, select OK.

Note For requests affecting multiple agents, some changes may take effect immediately, while other changes may be "pending." Immediate changes show up in the Skill windows immediately. Pending changes may require one or more manual refreshes using the **F5** hot key or by selecting the Refresh item on the Window menu before the Skill windows show that the changes have taken place.

8. A confirmation message, "Operation Successful," displays. Select OK.
9. The Multi-Agent Skill Change window displays.

   If you are done moving agents from skill to skill, or assigning new skills to multiple agents, close the window. Otherwise, repeat the preceding steps.

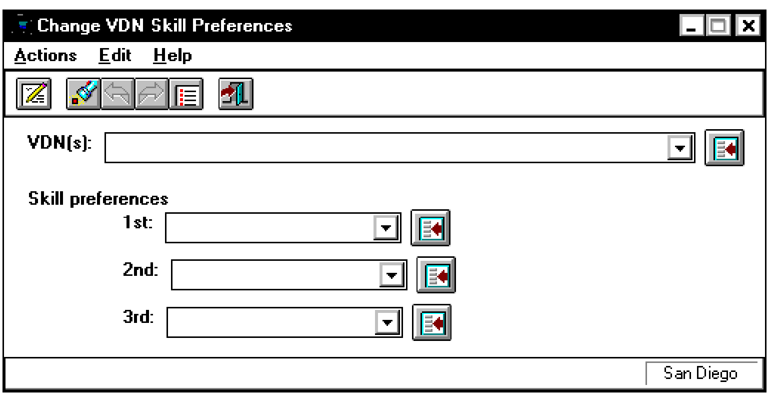
Changing VDN Skill Preferences

Note The Change VDN Skill Preferences operation is available only when the Call Vectoring and EAS features have been purchased and enabled for the ECS or the switch.

To change VDN skill preferences, do the following steps:

1. Select **ACD Administration** from the **Commands** menu, or select the ACD Administration button on the toolbar.
2. Select the ACD for which you want to change VDN skill preferences from the ACD list box.
3. Select **Change VDN Skill Preferences** from the Operations list box.
4. Select OK.

   The Change VDN Skill Preferences window appears.



5. In the VDN(s) text box, type or use the Browse button or history list to select the numbers or names of the VDNs you want to modify.

Note If you use the Browse button to search for VDN names, only the names that have been assigned in the Dictionary are shown. VDN numbers that exist, but have not been named in the Dictionary, do not display.

6. In the Skill preferences list boxes, type or use the Browse button  to choose the skill preferences you want associated with the selected VDN(s).

7. Select **<u>M</u>odify** from the **<u>A</u>ctions** menu, or select on the Modify button  on the toolbar.

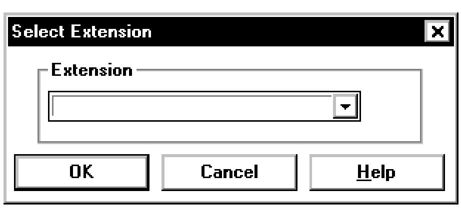
Change Extension Split Assignments

Note The Change Extension Split Assignments operation is available only on an ECS or switch that does not have the EAS feature. With EAS, “splits” do not apply.

To change the splits assigned to a specific extension number do the following steps:

1. Select **ACD Administration** from the **Commands** menu, or select the ACD Administration button  on the toolbar.
2. Select the ACD for which you want to make the change from the ACD list box.
3. Select **Change Extension Split Assignments** from the Operations list box.
4. Select OK.

   The Select Extension window displays:

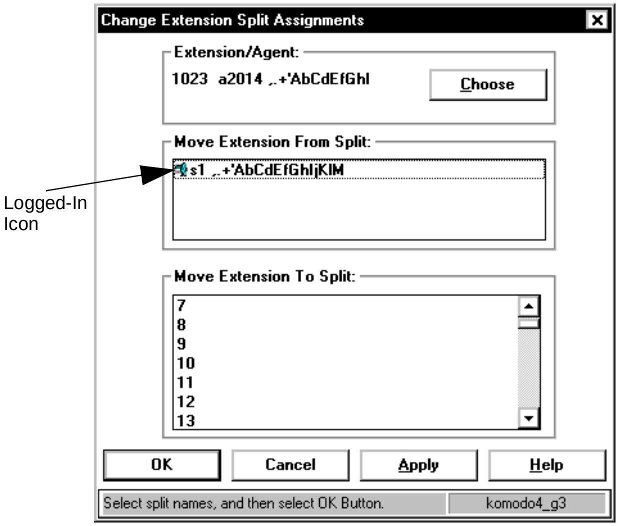


5. Type in the number of the extension for which you want to change the splits, or use the history list to select from the extensions you have already worked with.

Note You can do no other activity outside of the Select Extension window until you choose either the OK or Cancel button.

6. Select OK.

The Change Extension Split Assignments window displays:



Note If the extension is currently logged into the split shown in the “Move Extension From Split” list, the Logged-In icon shows. If the extension is not currently logged in, no icon is shown.

7. If you want to change splits for an extension other than the one displayed, select Choose to display the Select Extension window again.

   The Move Extension From Split: box shows the split the extension is currently assigned to. The Move Extension To Split: box lists all of the available split names/numbers.

8. In the Move Extension From Split: box, select the split name/number that you no longer want associated with this extension.

9. In the Move Extension To Split: box, select the split name/number that you want the extension assigned to.

10. If you want to change split assignments for other extensions, select Apply. Then select Choose and enter the next extension number.

    OR

    If you do not want to change split assignments for any other extension, select OK.

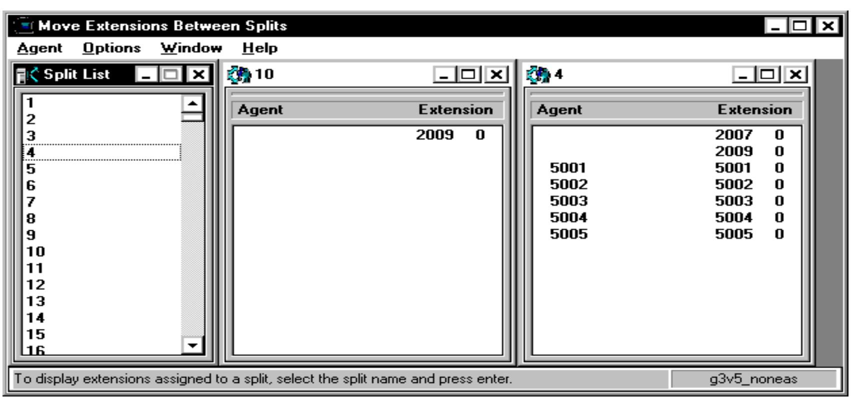
Moving Extensions Between Splits

Note The Move Extensions Between Splits operation is available only on the ECS or on a switch that does not have the EAS feature. With EAS, “splits” do not apply.

To move extensions between splits, do the following steps:

1. Select **ACD Administration** from the **Commands** menu, or select the ACD Administration button  on the toolbar.
2. Select the ACD for which you want to make the change from the ACD list box.
3. Select **Move Extensions Between Splits** from the Operations list box.
4. Select OK.

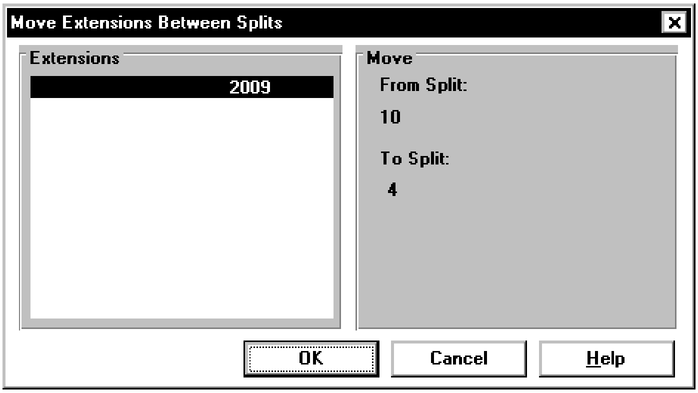
   The Move Extensions Between Splits window displays:



5. In the Split List window (shown on the left), double click on the names/numbers of the splits you want to work with.

   The Split windows open (shown to the right).

6. Once the windows are open for the splits you want to work with, you can move extensions between splits. Use one of the following methods to do this:
   - Click on one extension number, drag it to the split to which you want to move the extension, and let go of the mouse button.
   - Hold down the Ctrl button on your keyboard and click on multiple extension numbers in one split; then drag the extensions to the new split and let go of the mouse button.
   - Hold down the Shift button on your keyboard and click on two extension numbers to select the range of extensions listed between the two you clicked on; then drag the agents to the new split and let go of the mouse button.
7. When you let go of the mouse button, the Move Extensions Between Splits confirmation window displays:



8. If you want to finalize the move, select OK. If you do not want to perform this move, select Cancel.
9. When you are done making changes, close the Move Extensions Between Splits operation by closing the window.

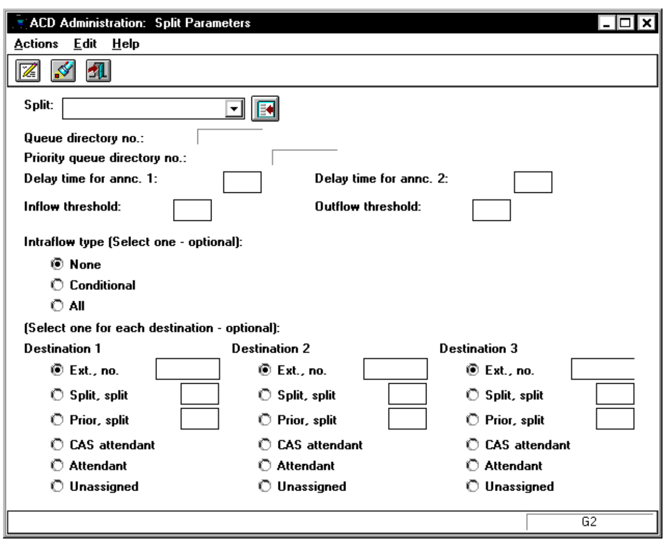
Setting Split Parameters

You will see this window only if you have a **Generic 2 switch without the Call Vectoring** feature.

To modify split parameters, do the following steps:

1. Select **ACD Administration** from the **Commands** menu, or select the ACD Administration button  on the toolbar.
2. Select the ACD for which you want to set split parameters from the ACD list box.
3. Select **Split Parameters** from the Operations list box.
4. Select OK.

   The Split Parameters window displays:



5. Enter a split name or number in the Split: text box, or use the Browse button  to view all available split names.
6. Select **Find one** from the **Actions** menu, or select the Find one button  on the toolbar.

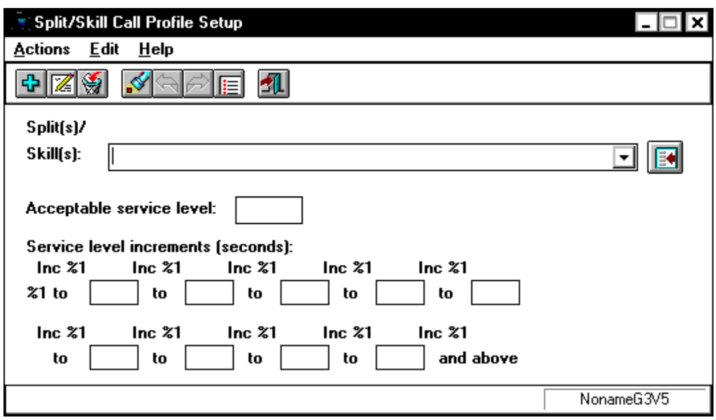
   The information regarding the split's set parameters is displayed.
7. Make changes to the split parameters.
8. Select **Modify** from the **Actions** menu, or select the Modify button  on the toolbar.

Setting Up Call Profiles

To set up a split/skill call profile or a VDN call profile, do the following steps:

1. Select **ACD Administration** from the **Commands** menu, or select the ACD Administration button on the toolbar.
2. From the ACD list box, select the ACD for which you want to set call profiles.
3. From the Operations list box, choose **Split/Skill Call Profile Setup** or **VDN Call Profile Setup**.
4. Select OK.

   The Split/Skill Call Profile Setup or the VDN Call Profile Setup window displays (Split/Skill Call Profile Setup is shown below). The windows are identical, except for the first input field, a text box which will be labeled for VDN(s) if you selected the VDN Call Profile Setup.



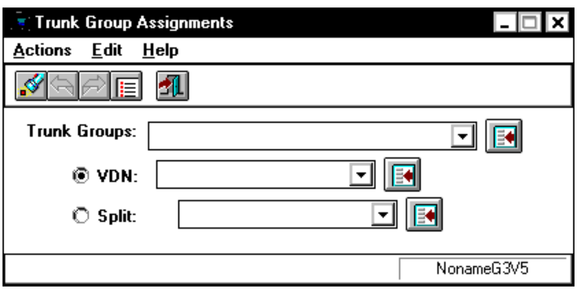
5. Type in the name or number of the split(s)/skill(s) or VDN(s) for which you want to set service levels, or use the pull-down history list or the Browse button to select the name(s)/number(s).
6. Type in the Acceptable service level.
7. Type in the Service level increments.
8. Select **Add** from the **Actions** menu, or select the Add button on the toolbar.

Viewing Trunk Group Assignments

To view trunk group assignments, do the following steps:

1. Select **ACD Administration** from the **Commands** menu, or select the ACD Administration button on the toolbar.
2. Select the ACD for whose trunk group assignments you want to view from the ACD list box.
3. From the Operations list box, select **Trunk Group Assignments**.
4. Select OK.

   The Trunk Group Assignments window displays:



5. To list all trunk group assignments, do the following:
   a. Leave the Trunk Groups: text box blank.
   b. Select **List all** from the **Actions** menu, or select the List all button from the toolbar.

      A list displays which shows all trunk groups and the splits or VDNs to which they are assigned.
6. To find one trunk group assignment do the following:
   a. Leave the Trunk Groups: text box blank.
   b. Select **Find one** from the **Actions** menu, or select the Find one button on the toolbar.

      The fields on the input window are filled in with information from the first match. To scroll through all trunk group assignments, use the Next and Previous buttons.

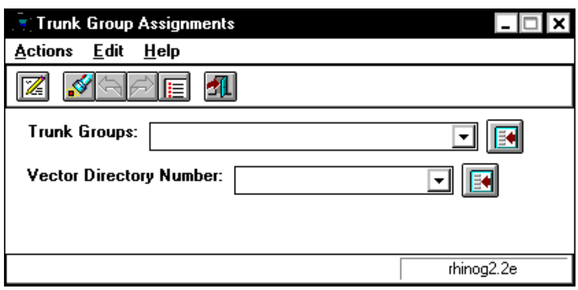
Changing Trunk Group Assignments

If you have a **Generic 2 switch**, you can change trunk group assignments using *CentreVu* Supervisor.

To change trunk group assignments, do the following steps:

1. Select **ACD Administration** from the **Commands** menu, or select the ACD Administration button  on the toolbar.
2. Select the ACD for which you want to view trunk group assignments from the ACD list box.
3. Select **Trunk Group Assignments** from the Operations list box.
4. Select OK.

   The Trunk Group Assignments window displays:



- To list all trunk group assignments, do the following:
  a. Leave the Trunk Groups: text box blank.
  b. Select **List all** from the **Actions** menu, or select the List all button  from the toolbar.

     A list displays of all trunk groups and the splits or VDNs to which they are assigned.
- To find one trunk group assignment, do the following:
  a. Leave the Trunk Groups: text box blank.
  b. Select **Find one** from the **Actions** menu, or select the Find one button  from the toolbar.

The fields on the input window are filled in with information from the first match. To scroll through all trunk group assignments, use the Next and Previous buttons.

- To change the VDN or split to which a trunk group is assigned, do the following:

  a. Do a Find one to display the trunk group information.

  b. Enter the new VDN assignment by typing in the name/number, using the history list, or using the Browse button .

  c. Select **Modify** from the **Actions** menu, or select the Modify button on the toolbar.

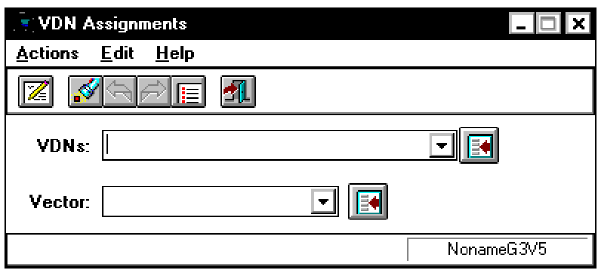
  When the modification is saved, the status bar reads Successful.

Changing VDN Assignments

To change VDN-to-vector assignments, do the following steps:

1. Select **ACD Administration** from the **Commands** menu, or select the ACD Administration button on the toolbar.
2. Select the ACD for which you want to change VDN assignments from the ACD list box.
3. Select **VDN Assignments** from the Operations list box.
4. Select OK.

   The VDN-to-Vector Assignments window displays:



5. Type in the name or number of the VDN(s) for which you want to change vector assignments, or use the pull-down history list for a previously used VDN, or the Browse button to view all possible VDNs.
6. Type in the name or number of the vector to which you want to assign the VDNs, or use the pull-down history list for a previously used vector, or use the Browse button to view all your vector choices.
7. Select **Modify** from the **Actions** menu, or select the Modify button on the toolbar.

9

CMS System Setup...

Introduction

This chapter teaches you how to use the Operations tab in the **CMS System Setup** tool.

The sections in this chapter are as follows:

- About **CMS System Setup**
- Starting **CMS System Setup**
- **CMS System Setup** Operations Tab
- **CMS System Setup** Operations Input Windows.

How **CMS System Setup** works in CMS is not described in detail in this chapter. For more information on **CMS System Setup** operations, please refer to the "System Setup" chapter in the *CentreVu™ CMS Administration* (585-215-820) document.

About CMS System Setup

From the **CMS System Setup** tool you can view windows that display how your CMS was configured during installation. You can also do the following actions from this tool:

- Check the current state of CMS, and change the state to or from single-user mode and multi-user mode.
- Turn data collection on or off.
- Allocate the amount of storage to be used for collecting historical data.
- Archive on demand for daily, weekly, and/or monthly summaries.
- Identify and specify where you would like to store specific CMS files.
- Load data into a pseudo-ACD.
- Define an ACD or pseudo-ACD to be used for unarchiving previously backed-up historical data.
- Migrate data from R2 CMS to *CentreVu* CMS.
- Migrate data from R3 CMS to *CentreVu* CMS.
- Specify the intervals of time for data to be stored (archived), and define what days of the week constitute a week for your call center (for example, Monday through Friday).
- View switch information.

Caution The **CMS System Setup** tool is not an area you should be working in daily because any changes you make in the **CMS System Setup** could affect the CMS server performance, disk space, or data collection.

Note The CMS System Setup operations affect the setup of the CMS, not the setup of your PC.

Starting CMS System Setup

To select any **CMS System Setup** item in Supervisor, do the following steps:

1. Choose **CMS System Setup** from the **Tools** menu.

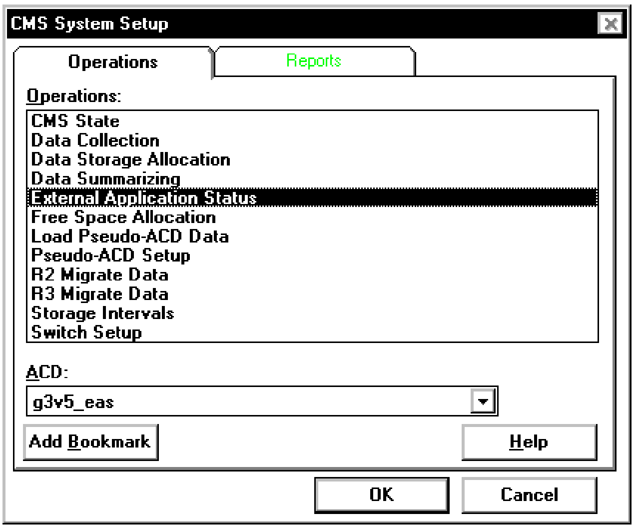
   OR

   Select the **CMS System Setup** icon  on the toolbar.

2. The **CMS System Setup** selector window appears. The only tab available in the **CMS System Setup** selector window is the Operations tab.

CMS System Setup Operations Tab

The following graphic shows the Operations tab, which contains the categories you can choose in **CMS System Setup**:



Note For more detail on the following **CMS System Setup** categories, please refer to the "System Setup" chapter of the *CentreVu™ CMS Administration* (585-215-820) document.

From the Operations tab, you may choose any of the following **CMS System Setup** categories:

- **CMS State —** allows you to bring CMS down to single-user mode and back to multi-user mode. You will also select your master ACD for clock synchronization in this window.
- **Data Collection —** allows you to turn data collection on or off for real ACDs.
- **Data Storage Allocation —** allows you to specify parameters for storing data on the CMS server. This affects disk space and is limited by your specific system configuration. Initially, these parameters are set during installation.

- **Data Summarizing —** allows you to archive data into the historical database on demand for daily, weekly, and monthly summaries.
- **External Application Status** — allows you to turn on or turn off the External Application feature, to start or stop external applications, or to view the status of external applications.

  Note External Application is a separately purchased CentreVu CMS feature.

- **Free Space Allocation —** allows you to identify and specify where you would like to store specific CMS files. For example, you can specify where to store all the files associated with trunks. This window is used to identify which file systems CMS uses.
- **Load Pseudo-ACD Data —** allows you to load ACD data into the pseudo-ACD created in the Pseudo-ACD Setup window.
- **Pseudo-ACD Setup —**allows you to create or delete an area on your CMS for a pseudo-ACD and give it a number. This area and number are used by CMS to restore previously backed-up ACD data using the Load Pseudo-ACD Data window. You can also use this window to take previously backed-up data on one CMS and then restore that data on another CMS.

  Note If you create a pseudo-ACD using Supervisor, you need to log out of Supervisor and then log back into Supervisor be able to see the new pseudo-ACD.

- **R2 Migrate Data —** allows you to migrate data from R2 3B CMS to *CentreVu* CMS. The following items can be included:
  - Administration data (User Permission), Dictionary, and Custom Reports
  - Historical Data and Forecast Administration Data.
- **R3 Migrate Data —** allows you to migrate data from R3 CMS to *CentreVu* CMS. The following items can be included:
  - System Administration data
  - ACD Administration data
  - Historical data

- **Storage Intervals —** allows you to specify a 15-, 30-, or 60-minute storage interval for call data, thereby allowing you to choose the storage interval that best meets the needs of your call center. You will also select the days of the week that begin and end your call center's week.

  Storage intervals can be changed to affect how often intrahour data are archived as well as to affect the times at which the data are archived. For example, if there is a change in the hours of your call center, you could change the "daily start time" or "daily stop time" to change when data are collected. Also, if you have specified a 60-minute intrahour interval and then you require a more detailed intrahour report, you could select a 15- or 30-minute intrahour interval and CMS will automatically adjust your historical data to reflect the change and give you the 15- or 30-minute interval data.

- **Switch Setup —** displays the following switch setup information for the ACD you specify as it was assigned during installation:

  — Switch Type

  — Switch Release

  — Purchased CMS release and version

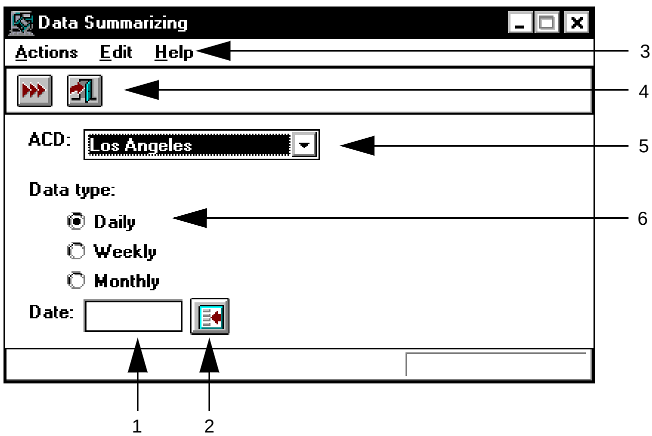
  — CentreVu CMS load

  — Phantom abandon call timer setting

  — CMS-administrable switch features (Call Vectoring, Call Prompting, and Expert Agent Selection).

CMS System Setup Operations Input Windows

When you select an item from the **CMS System Setup** Operations list, an input window displays. Below is an example of one of the input windows that you will see.



1. Input Field
2. Browse Button
3. Menu Bar
4. Action Buttons
5. History List
6. Data Type

The input window that displays is dependent on the category you selected.

- **Menu Bar** — includes pull-down lists for CMS **Actions** (Add, Delete, Find One, Next, Previous, List All, and Exit), **Edit** options (Cut, Copy, Paste, and Clear All), and Supervisor **Help**.
- **Action Buttons** — let you perform CMS actions (Add, Delete, Find One, Next, Previous, List All, and Exit) by clicking on a button. See Chapter 3, “Operations Basics,” for more information on the action buttons.
- **Input Fields** — are text boxes where you type in the information needed to complete the CMS action.
- **Data Type** — lets you define which type of data will be used (Daily, Weekly, or Monthly).
- **History List** — displays a list of predefined inputs from which you can select.

- **Browse Button** — lets you browse through all possible items for the input field. See the “Using the Browse Button” section in Chapter 2, “Supervisor Basics,” for more information.
- **Current ACD** — displays the ACD that you are performing CMS System Setup work on.

10

Maintenance...

Introduction

This chapter teaches you how to use the Operations and Reports tabs in the **Maintenance** tool. It also gives you information on performing tasks that are specific to the **Maintenance** tool.

The sections in this chapter are as follows:

- About **Maintenance**
- Starting **Maintenance**
- **Maintenance** Operations Tab
- **Maintenance** Operations Input Windows
- **Maintenance** Reports Tab
- Running the Error Log Report
- Translating Data from the Switch to the CMS.

How **Maintenance** works in CMS is not described in detail in this chapter. For more information on **Maintenance** operations, please refer to the “Maintenance” chapter in the *CentreVu™ CMS Administration* (585-215-820) document.

About Maintenance

The **Maintenance** tool allows you to perform routine maintenance of the CMS server such as backing up data, checking on the status of the connection to the switch, and scanning the error log.

From the **Maintenance** tool, you can do the following:

- View the measurement status of a particular ACD.
- View information about the last archive done for a particular type of data.
- Initiate CMS backups.
- Assign a name and description to a full path name for a backup device. This device, such as a tape drive, is used for data backups.
- Monitor the data link between the CMS processor and the switch.
- Assign printer names and options for the CMS server's printers.
- Initiate CMS restores.
- View the Error Log Report.

Note

The **Maintenance** operations affect the CMS, not your PC.

Starting Maintenance

To open **Maintenance**, do the following steps:

1. Choose **Maintenance** from the **Tools** menu.

   OR

   Select the Maintenance button  on the toolbar.

2. The **Maintenance** selector window appears. You will see the following tabs to choose from:
   - Operations
   - Reports.

Maintenance Operations Tab

The following graphic shows the Operations (categories) you can choose in **Maintenance**:

Note For more detail on the following **Maintenance** categories, please refer to the "Maintenance" chapter of the *CentreVu*™ *CMS Administration* (585-215-820) document.

From the Operations tab, you may choose any of the following **Maintenance** options:

- **ACD Status —** displays information about the current ACD selected in the window. From this window, you can find out the number of skills, number of skill members (agents logged in), trunk groups, trunks, VDNs, and vectors that CMS is measuring.

  Note If CMS is connected to a non-EAS switch, then an additional field displays, which shows the maximum number of splits. If the CMS is connected to a G2.1 switch, then an additional field displays, which shows the number of measured splits.

You can also use the ACD Status window to request a data translation from the switch to the CMS. You might want to do this if the link between the ACD and CMS is not properly brought up when you start CMS.

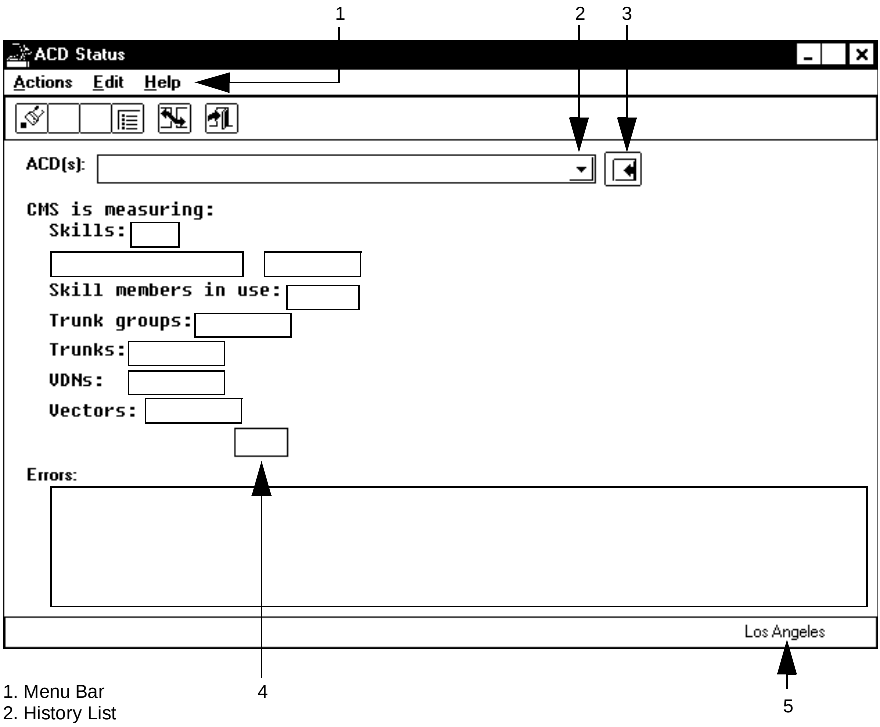
- **Archiving Status —** allows you to display (for the ACD you select) the status, date, and time of the last archive for interval, daily, weekly, and/or monthly data.
- **Back Up Data —** displays the number of backups completed for the current day and the status of the current or most recent backup. Allows you to initiate a backup, select a backup device, select which ACDs to back up (All or Current), select the types of data to back up, and select the type of backup (Full or Incremental). The Back Up Data window does not back up the software which supports the CMS product.
- **Backup/Restore Devices —** allows you to assign a name and description to a full path name for a device. The device name is used for data backup, data migration, data restore, and for loading a pseudo-ACD.
- **Connection Status —** allows you to monitor the data link between the CMS and the ACD(s) from the Connection Status window. This window also displays the current status of the application, session, and connection layers of the link between the switch and CMS.
- **Printer Administration —** allows you to assign a name, description, and some options to a CMS printer in the Printer Administration window. This provides the information that CMS needs in order to print any CMS report or window.

Note This printer cannot be used to print reports from the Supervisor application. You can use it to print reports from the Terminal Emulator or from another CMS terminal.

- **Restore Data —** allows you to restore CMS data that has been lost or ACDs that have been removed due to system failure, disk crashes, power outages, and so forth. You can restore all CMS data files that you have previously backed up.

Maintenance Operations Input Windows

When you select an item from the **Maintenance** Operations list, an input window displays. Below is an example of an input window that you may see.



1. Menu Bar
2. History List
3. Browse Button
4. Input Field
5. Current ACD

The input window that displays is dependent on the category that you select.

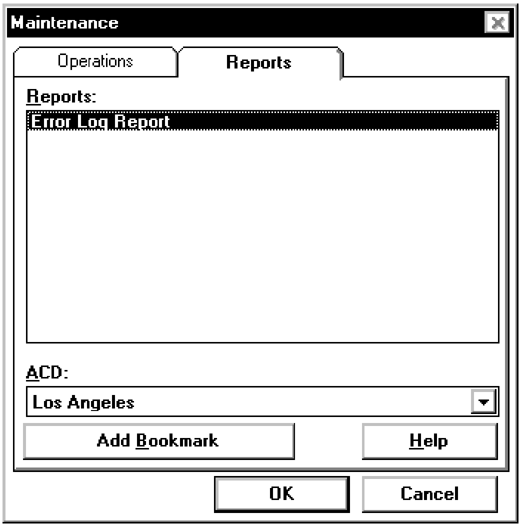
- **Menu Bar** —allows you to use pull-down lists to select CMS **Actions** (Add, Delete, Find One, Next, Previous, List All, and Exit), **Edit** options (Cut, Copy, Paste, and Clear All), and Supervisor **Help**.
- **Action Buttons** — allows you to perform CMS actions (Add, Delete, Find One, Next, Previous, List All, and Exit) by clicking on a button. See

Chapter 3, “Operations Basics,” for more information on the action buttons.

- **Input Fields** — allow you to type in the information needed to complete the CMS action.
- **History List** — displays a list of inputs you have previously used in the input field.
- **Browse Button** — allows you to browse through all possible items for the input field.

Maintenance Reports Tab

The following graphic shows the report that you can run in **Maintenance**:



From the Reports tab, you may choose the following **Maintenance** category:

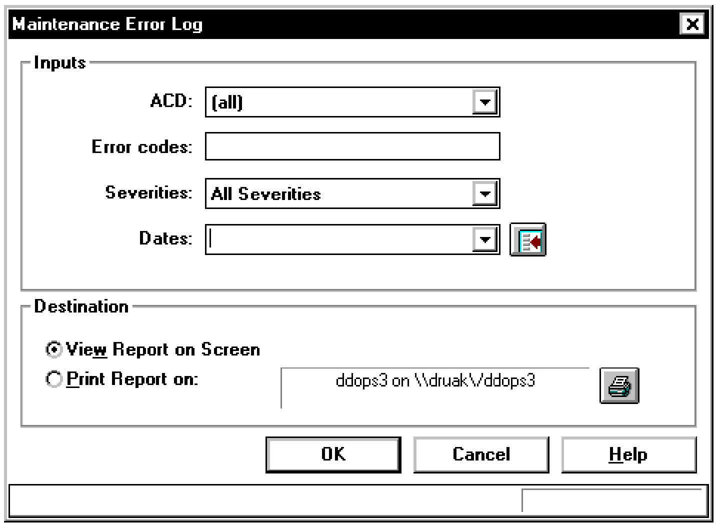
- **Error Log Report —** displays a chronological list of warnings, information, and errors detected by CMS. The main purpose of the error log is to aid you in working on system problems and to aid Lucent Technologies Services personnel in clearing problems in your system.

Running the Error Log Report

To run the Error Log Report, do the following steps:

1. Select **Maintenance** from the **Tools** menu, or select the Maintenance button  on the toolbar.

   The following input window displays:



2. Fill in the **input field**(s), including the following:

   - **ACD:** — select the ACD(s) for which you want to run the report.
   - **Error codes:** — if you want to run the report for specific error codes, enter them in this text box.
   - **Severity:** — select the severity of errors for which you want a report. You can choose All Severities, Error, Information, or Alarm.
   - **Dates:** — select the dates for which the report will run.

To complete the input fields, you can do the following:

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

3. Select the **report destination**.

   The Maintenance Error Log can be viewed on screen or printed to any *Microsoft*[*] *Windows*[†] printer your PC is connected to, or any *Microsoft Windows* printer on your LAN. You can specify the destination for the report on this window. If you want to view the report on screen, select the View Report on Screen option. If you want to print the report, select the Print Report on: option. If you want to print the report on a printer other than the one shown in the Print Report on: field, select the Print Setup button  and select a different printer.

   For more information on Print Setup, see the “Selecting a Printer” section in Chapter 4, “Reports Basics.”

4. Complete the input window, and select OK.

   The report runs.

*Microsoft is a registered trademark of Microsoft Corporation.
†Windows is a registered trademark of Microsoft Corporation.

Translating Data from the Switch to the CMS

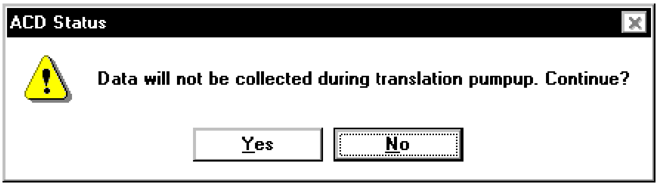
At times, the link between the switch and the CMS is not correctly established. If this is the case, you can perform a data translation from the switch to the CMS. To do this, do the following steps:

1. Select **Maintenance** from the **Tools menu,** or select the Maintenance button  on the toolbar.
2. Select **ACD Status** from the Operations tab.
3. Select OK.

   The ACD Status window displays.
4. Type the name(s) of the ACD(s), from which you want to translate data in the text box, or use the history list or browse button to select the ACD.
5. Select **Find one** from the **Actions** menu, or select the Find one button  on the toolbar.

   The information for that ACD displays.
6. Select **Translations** from the **Actions** menu, or select the Translations button  on the toolbar.

   A confirmation window displays:



7. Select the Yes button to continue the translation.

11

User Permissions...

Introduction

This chapter teaches you how to use the Operations tab in the **User Permissions** tool. It also gives you information on performing tasks that are specific to the **User Permissions** tool.

The sections in this chapter are as follows:

- About **User Permissions**
- Starting **User Permissions**
- **User Permissions** Operations Tab
- **User Permissions** Operations Input Windows
- Setting Up a New CMS User.

How **User Permissions** works in CMS is not described in detail in this chapter. For more information on **User Permissions** operations, please refer to the “User Permissions” chapter in the *CentreVu™ CMS Administration* (585-215-820) document.

About User Permissions

CMS user permissions are preserved in Supervisor. Your user permissions, as established by the CMS administrator, are the same whether you are using Supervisor, Terminal Emulator, or another terminal to access the CMS server.

From the **User Permissions** tool, the CMS administrator can assign the following permissions:

- ACD Access
- User access permissions for the CMS features
- CMS User IDs, default printers, maximum number of open user windows, the minimum refresh rate for real-time reports, login ACDs, and whether each user is a *normal* user or an *administrator*
- Split/skill, trunk group, and ACD access permissions
- Access permissions to VDNs and vectors if you have purchased the Vectoring feature.

A CMS administrator login ID is provided to you at installation. This login ID gives you access to the entire CMS system, including read and write permissions for all subsystems and ACDs (real and pseudo-ACDs).

Secondary administrators, such as split/skill supervisors, may require access to only a limited number of the CMS splits/skills, trunk groups, and ACDs and may require only read or write permission for a particular command or tool. For example, if your call center has a split (called split 1) with two trunk groups (22 and 23) assigned to it, then the supervisor of split 1 can be administered to be restricted to read and write access only for split 1 and trunk groups 22 and 23. In addition, the supervisor can be administered to have read and write permission for several commands needed to administer split 1 and trunk groups 22 and 23 effectively.

Note

Assign access permissions only as needed. If a CMS user has the CMS default permissions (that is, **no** access), do not add access permission in the read and write fields. CMS does not store records of split/skill, trunk groups, VDN, and vector access permissions until you enter the permissions in the appropriate window(s). This way of storing permissions saves disk space.

Starting User Permissions

To select any **User Permissions** item in Supervisor, do the following steps:

1. Select **User Permissions** from the **Tools** menu.

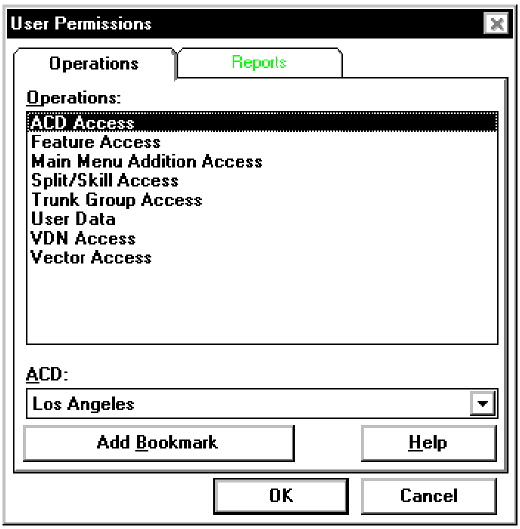
   OR

   Select the User Permissions button  on the toolbar.

2. The **User Permissions** window appears. The only tab available in **User Permissions** is the Operations tab.

User Permissions Operations Tab

The following graphic shows the Operations you can choose in **User Permissions**:



From the Operations tab, you can choose any of the following categories:

- **ACD Access —** allows you to assign, view, delete, and modify a user's ability to access real or pseudo ACDs. This could be one ACD or several. You will also turn on or off the exceptions notification for ACDs in this window.
- **Feature Access —** allows you to assign, view, or modify user access permissions for the CMS subsystems (for example, Reports, Dictionary, Exceptions) and certain function key (SLK) menu items (such as *UNIX*[*] system / *Solaris*[†] system, Timetable).

Note SLK menu items are accessible only from Terminal Emulator.

* UNIX is a registered trademark in the United States and other countries, licensed exclusively through X/Open Corporation.
† Solaris is a registered trademark of Sun Microsystems, Inc.

The access permissions you give to any user affect what that user is able to do with CMS.

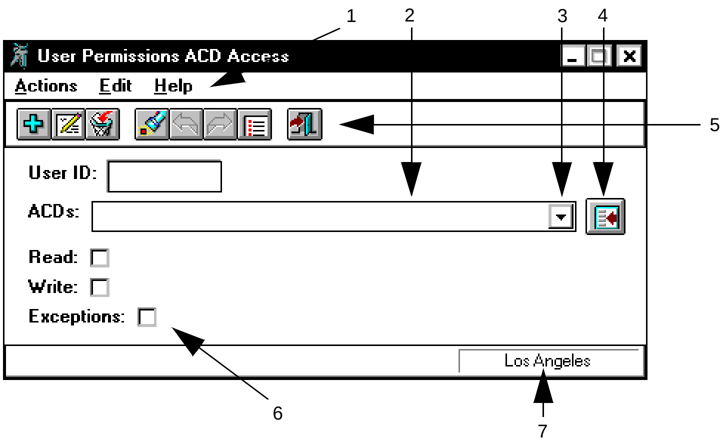
- **Main Menu Addition Access —** allows you to assign, view or modify user access permissions for the additional menu items of your choosing. These items could be access to your local electronic mail environment or daily news articles about your call center for agents or split/skill supervisors.

Note Main Menu Addition Access applies only if you are using the CMS from a terminal or through the Terminal Emulator.

- **Split/Skill Access —** allows you to assign, view, modify, or delete a user's permissions to specify splits/skills. Split/Skill Access permissions determine your ability to access and administer agent/queue data for a particular split or skill. You will also turn on or off the exceptions notification for splits/skills in this window.
- **Trunk Group Access —** allows you to assign, view, modify, or delete a user's access permissions to specific trunk groups. Trunk Group Access permissions determine a user's ability to access and administer data for a particular trunk group. You will also turn on or off the exceptions notification for trunk groups in this window.
- **User Data —** allows you to assign CMS user IDs, specify a default printer, specify whether the user is a normal user (such as a split/skill supervisor) or an administrator, and administer the maximum number of open windows, the minimum refresh rate for real-time reports, and the default login ACD.
- **VDN Access —** allows you to assign, view, modify, or delete a CMS user's access permissions to specific VDNs. You can define VDN access permissions for users to determine a user's ability to administer VDNs with the various CMS subsystems and to access report/administration data for VDNs.
- **Vector Access —** allows you to define vector access permissions for users to determine a user's ability to administer vectors and to access report/administration data for vectors. Use to assign, view, modify, or delete a CMS user's access permissions to specific vectors.

User Permissions Operations Input Windows

When you select an item from the **User Permissions** Operations list, an input window displays. Below is an example of one of the input windows that you will see.



1. Menu Bar
2. Input Field(s)
3. History List
4. Browse Button
5. Action Buttons
6. Permissions Check Boxes
7. Current ACD

Note For more detail on the following **User Permissions** categories, please refer to the "User Permissions" chapter of the *CentreVu*™ *CMS Administration* (585-215-820) document.

The input window that displays is dependent on the category you select.

- **Menu Bar** — allows you to use a pull-down list to select CMS **Actions** (Add, Delete, Find One, Next, Previous, List All, and Exit), **Edit** options (Cut, Copy, Paste, and Clear All), and Supervisor **Help**.
- **Action Buttons** — let you perform CMS actions (Add, Delete, Find One, Next, Previous, List All, and Exit) by clicking on a button. See Chapter 3, "Operations Basics," for more information on the action buttons.
- **Input Fields** — are text boxes where you type in the information needed to complete the CMS action.

- **History List** — displays a list of inputs you have previously used in the input field.
- **Browse Button** — lets you browse through all possible items for the input field.
- **Permissions Check Boxes** — lets you turn read, write, and exceptions user permissions for the category on and off. When checked, the permission is on. When not checked, the permission is off. See the “Using Check Boxes” section in Chapter 2, “Supervisor Basics,” for more information.
- **Current ACD** — displays the ACD you are performing User Permissions work on.

Setting Up a New CMS User

To set up a new CMS user, do the following steps:

- Establish a User ID.
- Establish CMS Subsystem Permissions.
- Establish ACD Permissions.
- Establish Split/Skill Permissions.
- Establish Trunk Group Permissions.
- Establish Vector Permissions.
- Establish VDN Permissions.
- Establish Main Menu Addition Permissions.

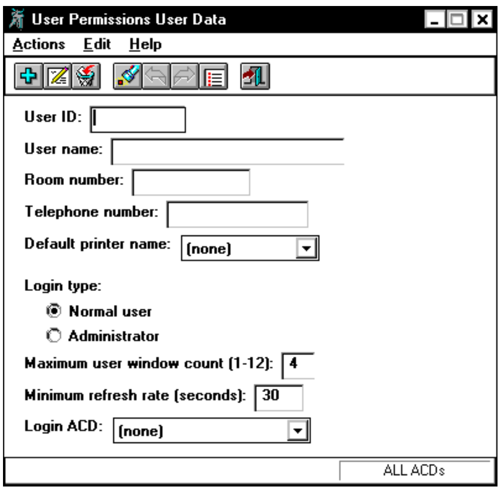
With the exception of establishing a User ID (which must be done first), the order in which you perform the steps does not matter. The following sections walk you through each of the steps in creating a new CMS user.

Establishing a User ID

Establish the User ID by doing the following steps:

1. Choose **User Permissions** from the **Tools** menu, or select the User Permissions button on the toolbar.
2. Select **User Data** from the Operations tab and select OK.

   The User Data input window displays.



Note To clear all of the fields in the window at any time, select **Clear all** from the **Edit** menu, or press Ctrl+E.

3. Complete the User Data input window.
4. Select **Add** from the **Actions** menu, or select the Add button on the toolbar to save the user's User ID and Login type on the CMS.
5. When the information is successfully saved, the status bar reads Successful.
6. Close the User Data window.

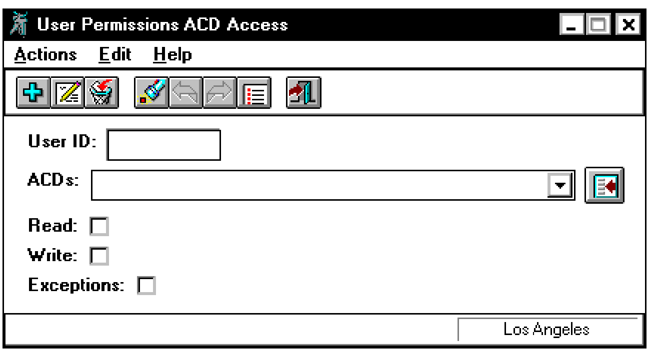
Establishing ACD Permissions

Establish the user's ACD access by doing the following steps:

Note The default permissions for ACDs is yes for all ACDs.

1. Choose **User Permissions** from the **Tools** menu, or select the User Permissions button  on the toolbar.
2. Select **ACD Access** from the Operations tab and select OK.

   The ACD Access input window displays.



Note To clear all of the fields in the window at any time, select **Clear all** from the **Edit** menu, or press Ctrl+E.

3. Type the User ID you assigned in the User Data window in the User ID: text box.
4. Clear the ACDs: text box.
5. Leave the Read, Write, and Exceptions check boxes selected.

6. Select **Find one** from the **Actions** menu, or select the Find one button on the toolbar.

   The ACDs box is filled in with the first ACD this CMS tracks.

   The status bar reads “xx Matches found.”

7. Use the Next and Previous buttons to scroll through the list of available ACDs for this User ID.

8. Change the Read, Write, and Exceptions check box permissions, as applicable (checked = on, blank = off), for each ACD.

9. Select **Modify** from the **Actions** menu, or select the Modify button on the toolbar to modify the record for each ACD.

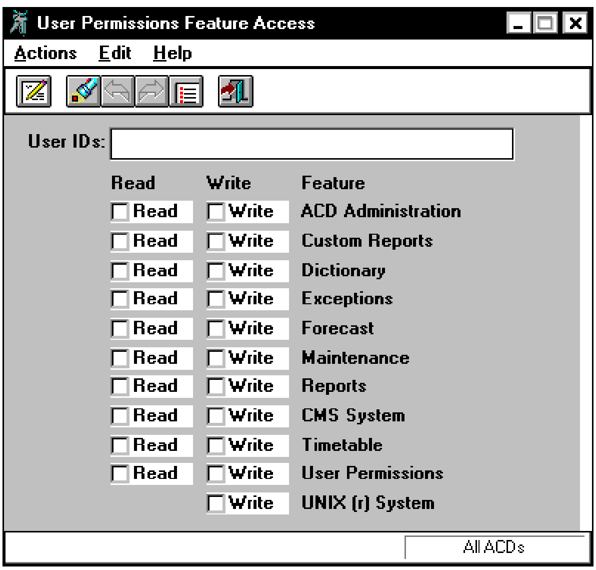
10. Close the ACD Access window.

Establishing Feature Access Permissions

Establish the user's CMS subsystem feature access by doing the following steps:

1. Choose **User Permissions** from the **Tools** menu, or select the User Permissions button on the toolbar.
2. Select **Feature Access** from the Operations tab and select OK.

   The Feature Access input window displays.



Note To clear all of the fields in the window at any time, select **Clear all** from the **Edit** menu, or press Ctrl+E.

3. Type in the User ID you assigned in the User Data window.
4. Select **Find one** from the **Actions** menu, or select the Find one button on the toolbar.
5. The permissions for that user display.

6. Select or deselect the check boxes as appropriate for this user.

> **Note** For more information on read / write permissions, see the "User Permissions" chapter in the *CentreVu*™ *CMS Administration* (585-215-820) document.

7. Select **Modify** from the **Actions** menu, or select the Modify button  on the toolbar.

   When the information is successfully saved, the status bar reads "Successful."

8. Close the Feature Access window.

Establishing Main Menu Addition Permissions

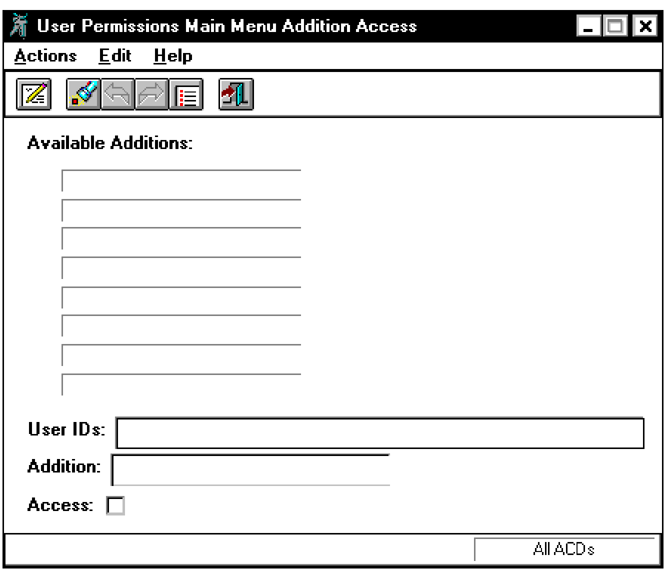
Establish the user's Main Menu Addition access permissions by doing the following steps:

Note Main Menu Additions show up only when you are using a terminal or Terminal Emulator to access CMS.

Main Menu Additions are created in the **CMS System Setup** tool.

1. Choose **User Permissions** from the **Tools** menu, or select the User Permissions button on the toolbar.
2. Select **Main Menu Addition Access** from the Operations tab and select OK.

   The Main Menu Addition Access input window displays.



Note To clear all of the fields in the window at any time, select **Clear all** from the **Edit** menu, or press Ctrl+E.

3. Type the User ID you assigned in the User Data window in the User ID: text box.
4. Type one of the available additions (from the list at the top of the window) in the Addition: text box.
5. Change the Read, Write, and Exceptions check box permissions, as applicable (checked = on, blank = off), for the VDN(s).
6. Select **Modify** from the **Actions** menu, or select the Modify button  on the toolbar to modify the record for each main menu addition.
7. Close the Main Menu Addition Access window.

Establishing Split/Skill Permissions

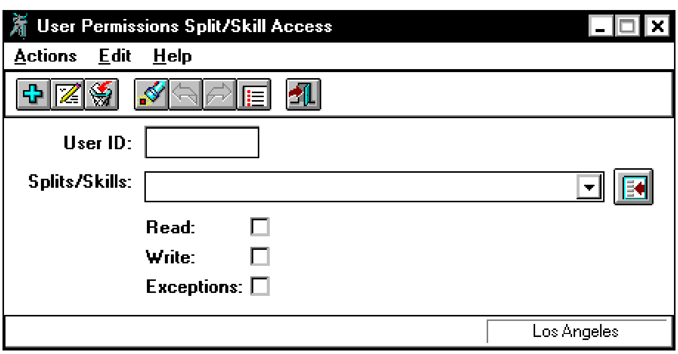
Establish the user's split/skill access by doing the following steps:

Note The default permissions for splits/skills is no read/no write for all users. However, CMS does not store any split/skill access records for a user until you establish them in the window described below.

Choose **User Permissions** from the **Tools** menu, or select the User Permissions button  on the toolbar.

8. Select **Split/Skill Access** from the Operations tab.
9. Select OK.

   The Split/Skill Access input window displays.



Note To clear all of the fields in the window at any time, select **Clear all** from the **Edit** menu, or press Ctrl+E.

10. Type the User ID you assigned in the User Data window in the User ID: text box.
11. Type the name(s) or number(s) of the split(s)/skill(s) for which you are assigning permissions.

12. Change the Read, Write, and Exceptions check box permissions, as applicable (checked = on, blank = off), for the split(s) / skill(s).

13. Select **Add** from the **Actions** menu, or select the Add button  on the toolbar to modify the record for each split / skill.

14. Close the Split / Skill Access window.

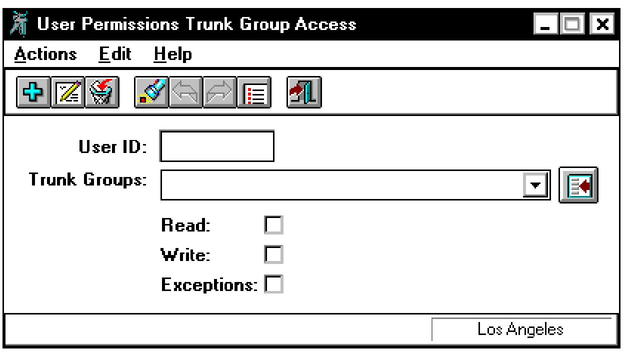
Establishing Trunk Group Permissions

Establish the user's trunk group access by doing the following steps:

Note The default permissions for trunk groups is no read / no write for all users. However, CMS does not store any trunk group access records for a user until you establish them in the window described below.

1. Choose **User Permissions** from the **Tools** menu, or select the User Permissions button  on the toolbar.
2. Select **Trunk Group Access** from the Operations tab and select OK.

   The Trunk Group Access input window displays.



Note To clear all of the fields in the window at any time, select **Clear all** from the **Edit** menu, or press Ctrl+E.

3. Type the User ID you assigned in the User Data window in the User ID: text box.
4. Type the name(s) or number(s) of the trunk group(s) for which you are assigning permissions, or use the browse button to select the trunk group(s).
5. Change the Read, Write, and Exceptions check box permissions, as applicable (checked = on, blank = off), for the trunk group(s).
6. Select **Add** from the **Actions** menu, or select the Add button  on the toolbar to modify the record for each trunk group.
7. Close the Trunk Group Access window.

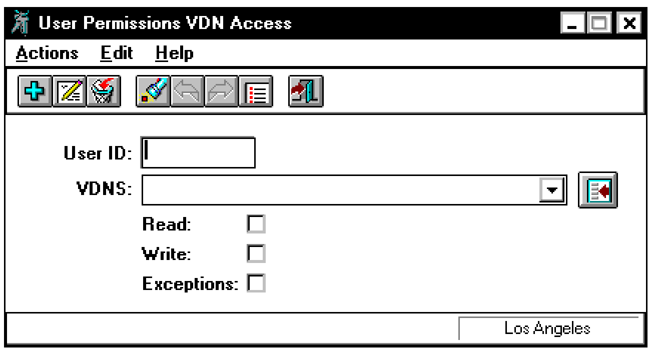
Establishing VDN Permissions

Establish the user's VDN access by doing the following steps:

Note The default permissions for VDNs no read / no write for all users. However, CMS does not store any VDN access records for a user until you establish them in the window described below.

1. Choose **User Permissions** from the **Tools** menu, or select the User Permissions button  on the toolbar.
2. Select **VDN Access** from the Operations tab and select OK.

   The VDN Access input window displays.



Note To clear all of the fields in the window at any time, select **Clear all** from the **Edit** menu, or press Ctrl+E.

3. Type the User ID you assigned in the User Data window in the User ID: text box.
4. Type the name(s) or number(s) of the VDN(s) you are assigning permissions for, or use the browse button to select the VDN(s).
5. Change the Read, Write, and Exceptions check box permissions, as applicable (checked = on, blank = off,) for the VDN(s).
6. Select **Add** from the **Actions** menu, or select the Add button  on the toolbar to modify the record for each VDN.
7. Close the VDN Access window.

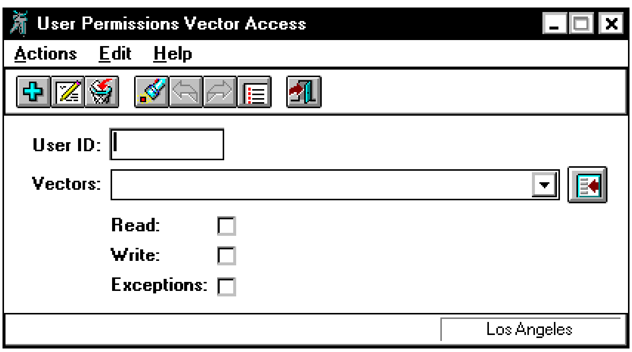
Establishing Vector Permissions

Establish the user's vector access by doing the following steps:

Note The default permissions for vectors is no read / no write for all users. However, CMS does not store any vector access records for a user until you establish them in the window described below.

1. Choose **User Permissions** from the **Tools** menu, or select the User Permissions button  on the toolbar.
2. Select **Vector Access** from the Operations tab and select OK.

   The Vector Access input window displays.



Note To clear all of the fields in the window at any time, select **Clear all** from the **Edit** menu, or press Ctrl+E.

3. Type the User ID you assigned in the User Data window in the User ID: text box.
4. Type the name(s) or number(s) of the vectors(s) you are assigning permissions for, or use the browse button to select the vector(s).
5. Change the Read, Write, and Exceptions check box permissions, as applicable (checked = on, blank = off), for the vector(s).
6. Select **Add** from the **Actions** menu, or select the Add button  on the toolbar to modify the record for each vector.
7. Close the Vector Access window.

12

Options...

Introduction

This chapter teaches you how to use the **Options** tool to change the setup of the Supervisor application.

The sections in this chapter are as follows:

- About **Options**
- Starting **Options**
- **Options** General Tab
- **Options** Report Colors Tab
- **Options** Thresholds Colors Tab
- **Options** Names Tab
- Creating a New Report Color Scheme
- Creating a New Threshold Color Scheme
- Creating a New Name Format.

About Options

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

- Set up or change the options for connecting to a remote host computer (Communications tab).
- Set up or change dial strings for connecting to the remote CMS through a modem port (Modem tab).
- Set the first calendar day that will display in Supervisor browse windows. (General Tab).

  Note This does not change the first day of the week that CMS uses for reporting purposes.

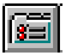
- Set the ACD and other general options that Supervisor will default to when you log in (General tab).
- Set up the colors that will be used in your graphical reports (Report Colors tab).
- Set up the colors that will be used in reports to tell you when threshold highlights (not exceptions thresholds) have been reached. See Chapter 5, "Reports," for more information on threshold highlights.
- Choose or create a name format using {name} for Dictionary Name, {entity} for entity type, and {number} for entity number. The name format is how items will be displayed in reports. For instance, if you select the name format of {entity}{number}, then all of the entities (splits/skills, ACDs, VDNs, vectors, trunks, trunk groups, call work codes, and AUX codes) that can be named in the Dictionary will display as the entity type and number instead of the Dictionary name. If you selected {name} as the name format, then the names that have been assigned to the entities in the Dictionary will display.

Starting Options

To select any **Options** item in Supervisor, do the following steps:

1. Choose **Options** from the **Tools** menu.

   OR

   Select the Options button  on the toolbar.

2. The **Options** window appears. You will see the following tabs to choose from:

   - Communications
   - Modem
   - General
   - Report Colors
   - Threshold Colors
   - Name Format.

   The following sections describe the options available in each tab.

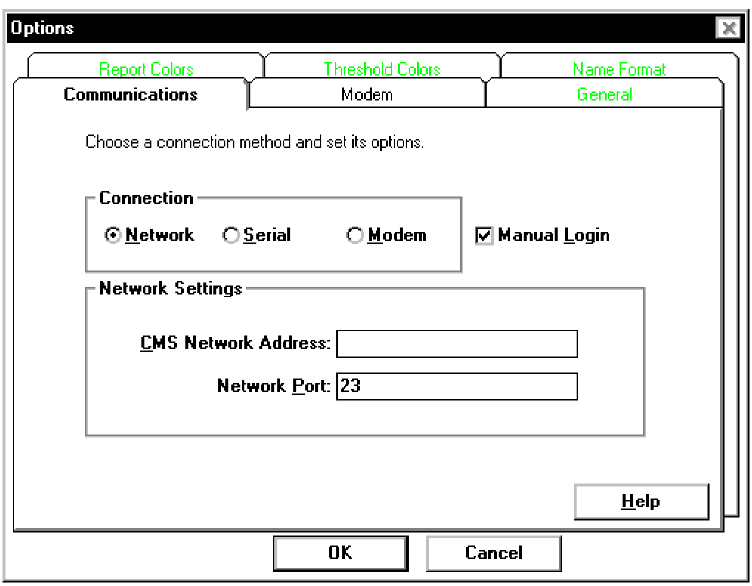
Options Communications Tab

Note The Communications tab is accessible only when you are **not** connected to a CMS server.

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

- Select **Network**, **Serial**, or **Modem** from the Connection box. Below are explanations and examples of the settings required for each type of connection.
- Select **Network** if you are connecting to the CMS through a network.

  An example of standard settings for a network connection is shown below:



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

The information required for this setting is as follows:

— **CMS Network Address** — Enter the name or the Internet Protocol (IP) address of the remote host. There is no default.

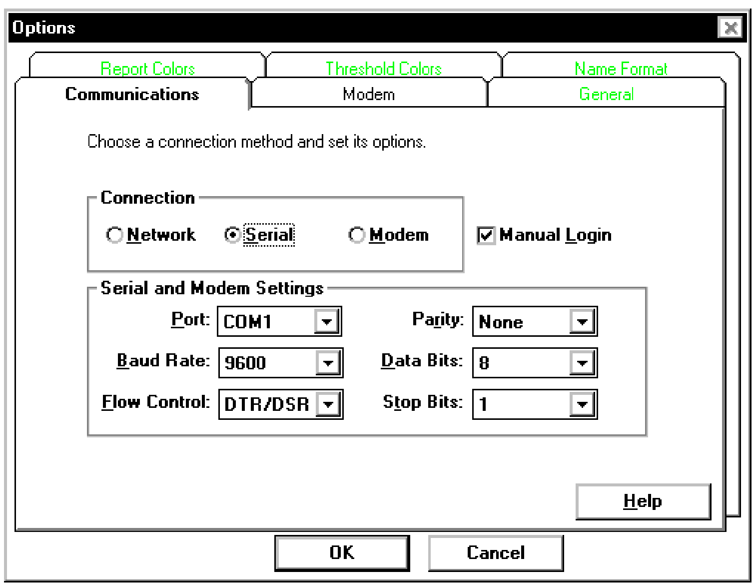
— **Network Port** — Enter the network port that you wish to connect. The default is 23, which is the network port reserved for Telnet.

- Select **Serial** if you are connecting to the CMS through a serial connection.

  The information required for the **Serial** setting is described on the next page.

- Select **Modem** if you are connecting to the remote CMS through a modem.

  An example of standard settings for a serial or modem connection is shown below:



Warning

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

Chapter 12

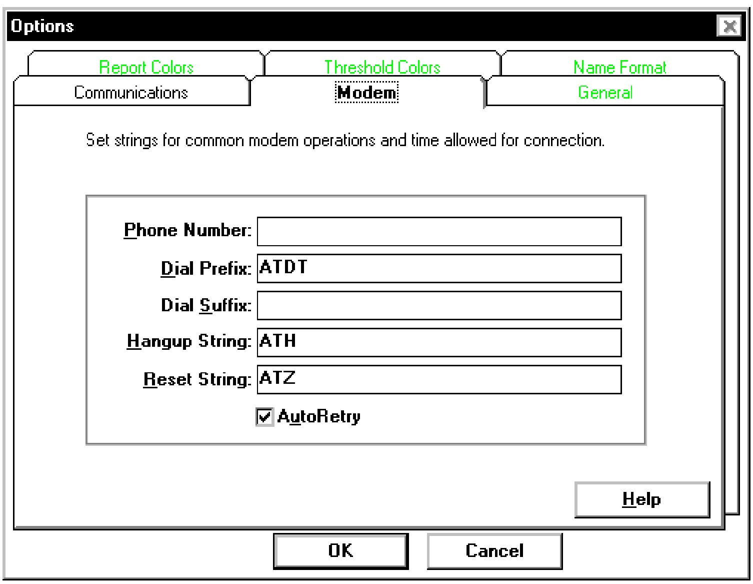
The information required for the **Serial** and **Modem** settings is as follows:

- **Port** — choose from the drop-down list the name of the communication port (COM) you will use to connect to the remote CMS. The options are COM1, COM2, COM3, and COM4.
- **Baud Rate** — choose the baud rate from the drop-down list. The options are 2400, 4800, 9600, 14.4K, 19.2K, and 38.4K.
- **Flow Control** — choose the appropriate flow control from the drop-down list. The options are None, Xon / Xoff, Rts / Cts, and Both.
- **Parity** — choose the appropriate parity setting from the drop-down list. The options are None, Odd, Even, Mark, and Space.
- **Data Bits** — choose the number of data bits from the drop-down list. The options are 5, 6, 7, and 8.
- **Stop Bits** — choose the number of stop bits from the drop-down list. The options are 1, 1.5, and 2.

Options Modem Tab

Note The Modem tab is accessible only when you are **not** connected to a CMS server.

Select the **Modem** tab to set up or change dial strings for connecting to the remote CMS through a modem port. If you are connecting to the CMS through a modem, you also need to select the Modem option on the Communications tab. The following paragraphs describe the options available to you for setting up the modem connection. Below is an example of standard modem settings for Supervisor:



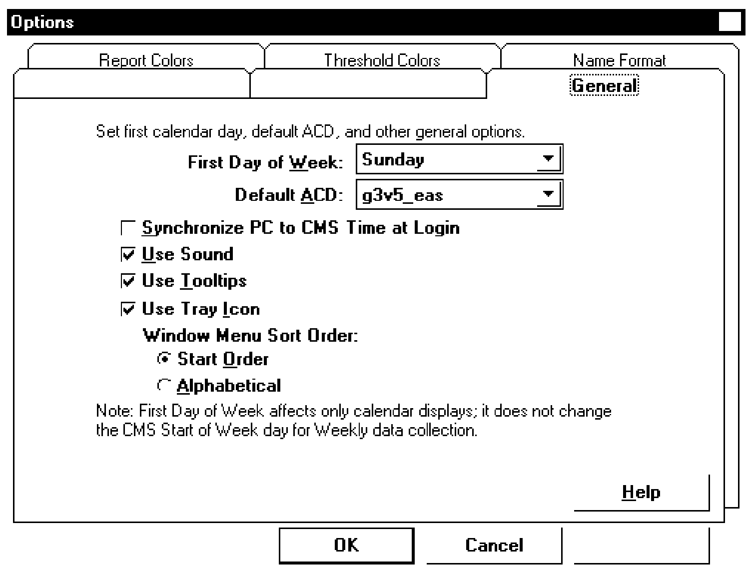
- **Phone Number** — enter the phone number of the remote host.
- **Dial Prefix** — enter the digits to be dialed **before** the Phone Number of the remote host. For example, if a 9 has to be dialed before the telephone number of the remote host, enter a 9 in this text box.

- **Dial Suffix** — enter the digits to be dialed **after** the Phone Number of the remote host. For example, if an extension has to be dialed after the telephone number of the remote host, enter it here.
- **Hangup String** — enter the character string to send to the modem to cause it to hang up the connection.
- **Reset String** — enter the character string to send to the modem to cause it to reset itself.
- **Auto Retry** — use this check box to turn on (or off) the auto retry option. If this option is turned off, the modem tries only once to establish a connection to the remote host.

Options General Tab

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

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



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

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

  Use the drop-down list to make your selection.

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

Use the drop-down list to make your selection.

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

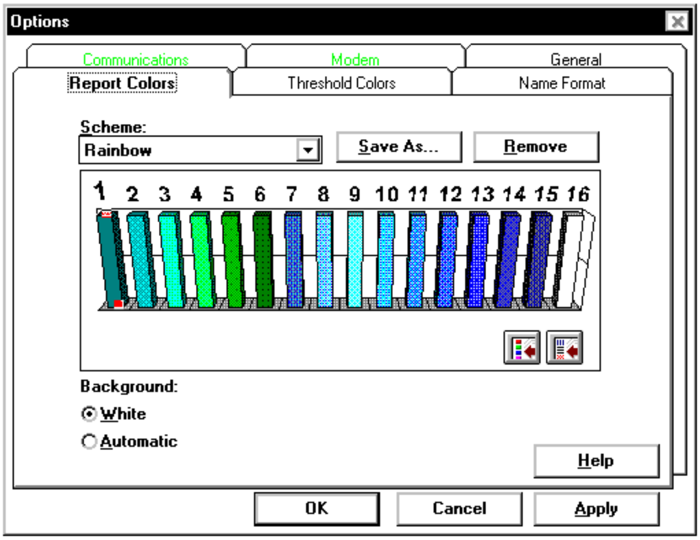
Note Threshold Highlighting does **not** use sound. It uses color only as an indicator of a threshold being met.

- **Use Tooltips —** activate the check box for selection to make tooltips visible. For example, when you are working on the Controller window, you may place your mouse cursor over a toolbar button and a yellow box will appear with a brief description of that button.
- **Use Tray Icon —** activate the check box for this selection to use the Supervisor system tray icon feature. See Chapter 2, "Supervisor Basics," for more information on using the Supervisor system tray icon.
- **Window Menu Sort Order** —if you activate the Use Tray Icon, you need to determine how the items that display in the system tray icon menu will be sorted.
  - **Start Order** — select this radio button and the items in the system tray icon menu will display in the order in which you started them from Supervisor.
  - **Alphabetical** — select this radio button and the items in the system tray icon menu will display in alphabetical order, regardless of the order in which you started them.

Options Report Colors Tab

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

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



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

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

Chapter 12

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

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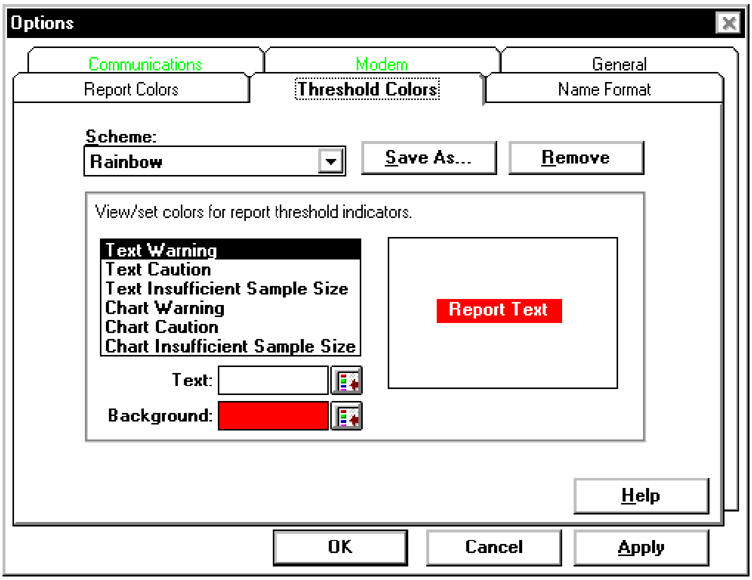
*Windows is a registered trademark of Microsoft Corp.

Options Threshold Colors Tab

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

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



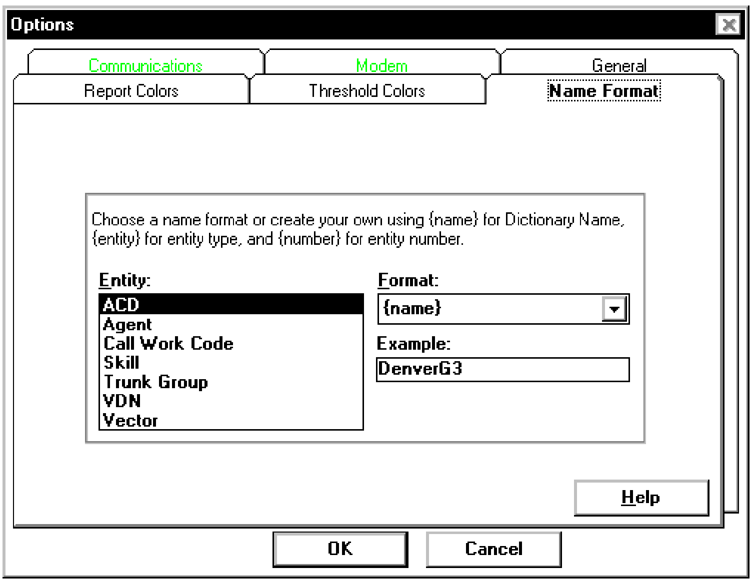
Use the Threshold Colors tab to set up the colors that will be used in reports to tell you when exceptions thresholds have been reached. You can select report color schemes in the following ways:

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

Options Name Format Tab

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

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



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

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

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

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

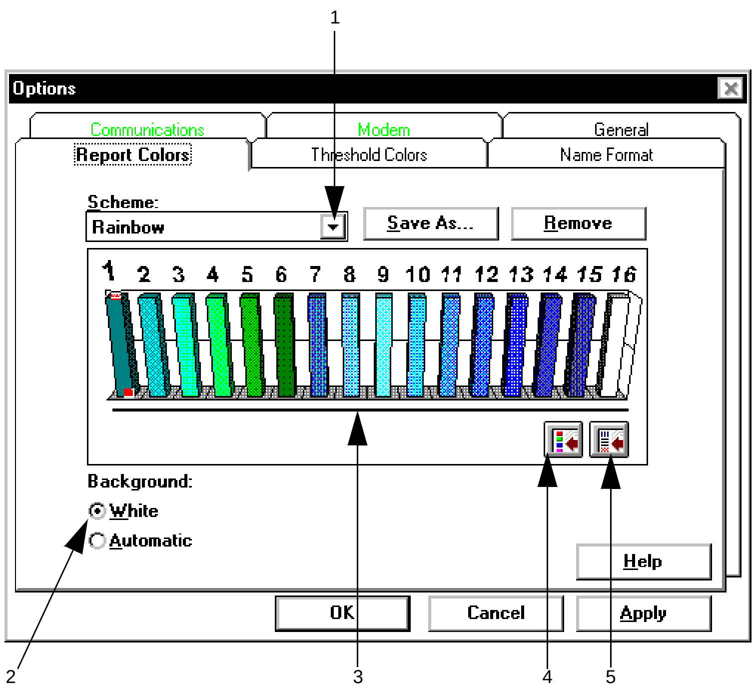
   The **Example** box provides an example of what the format will look like based on your current definition of the name format.
3. Select OK to save your changes. Select Cancel to clear your changes.

Creating a New Report Color Scheme

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

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

   The view of the scheme displays:



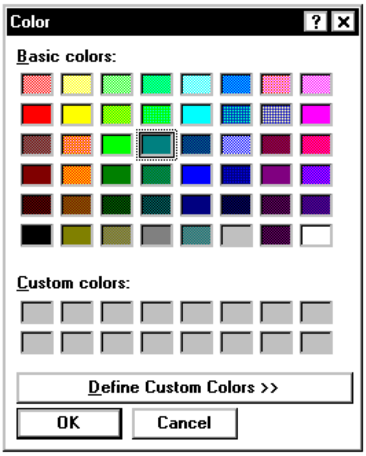
1. Scheme Drop-Down Selector List
2. Background Color
3. Color Bars
4. Color Selector
5. Pattern Selector

4. Choose the **Background** color for reports by selecting **White** or **Automatic**.

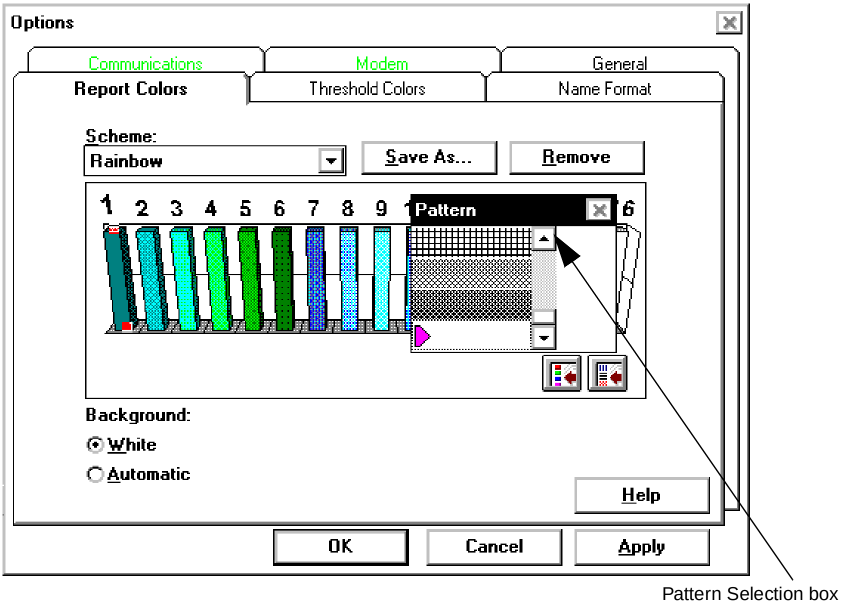
5. Click on the color bar (1 through 16) you want to modify.

6. Select either the Color Selector or the Pattern Selector button.

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



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



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

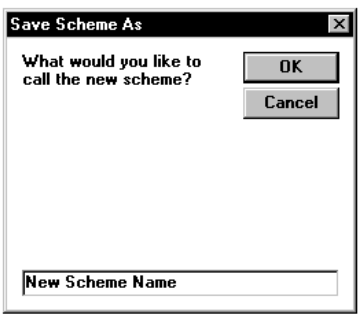
   To select a new **pattern**, click on the pattern you want to use.

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

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

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

   The following window displays:



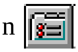
10. Type the name of the report color scheme that you created in the text box.

11. Select OK to save the scheme and the scheme name.

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

Creating a New Threshold Color Scheme

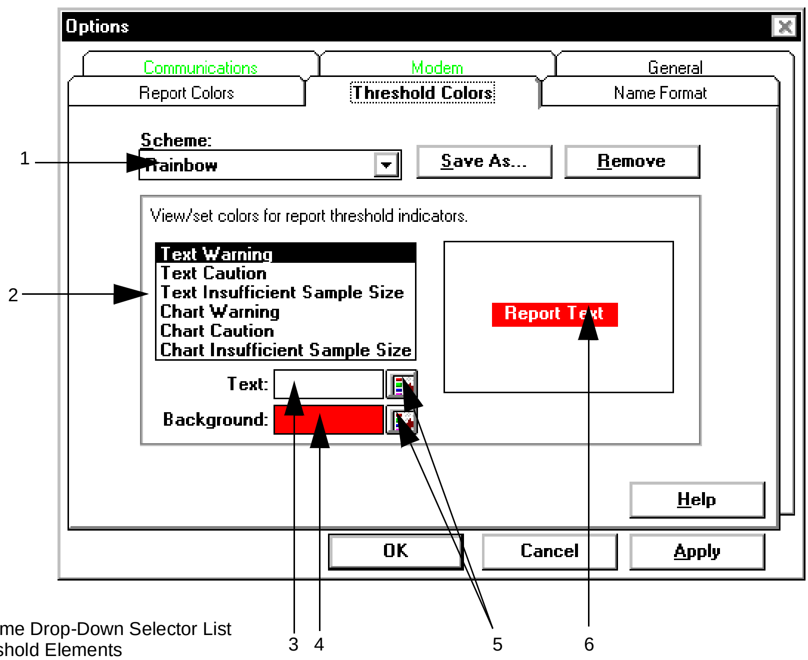
To create a new threshold color scheme for reports, do the following steps:

1. Choose **Options** from the **Tools** menu, or select the Options button  on the toolbar.

2. Select the Threshold Colors tab.

3. Select the color scheme with which you want to begin from the Scheme: drop-down list.

   The view of the scheme displays:



1. Scheme Drop-Down Selector List
2. Threshold Elements
3. Text Color
4. Background Color
5. Color Selector Buttons
6. Element Current Colors

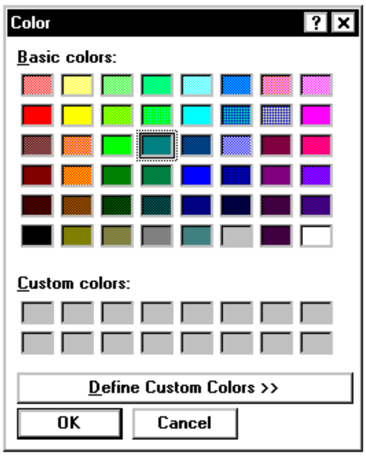
4. Select the element of threshold highlighting that you want to modify colors for from the list box (Text Warning, Text Caution, Text Insufficient

Sample Size, Chart Warning, Chart Caution, or Chart Insufficient Sample Size)

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

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

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



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

   c. Select OK when you are done.

      The Options window displays.

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

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

      The Color palette displays.

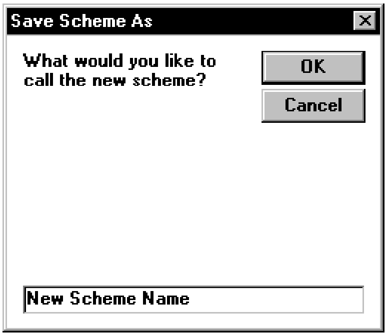
   b. Choose a color from the Basic colors palette or create a custom color using standard *Windows* procedures.

   c. Select OK when you are done.

   d. The Options window displays.

7. Repeat steps 4 through 6 until you have updated all of the threshold element colors that you want to modify.
8. When you are done modifying the threshold element colors, select Save As.

   The following window displays:



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

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

Chapter 12

Creating a New Name Format

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

1. Choose **Options** from the **Tools** menu, or select the Options button  on the toolbar.
2. Select the Name Format tab.
3. Select the Entity for which you want to change the name format.
4. In the Format text box, use the drop-down list to select one of the standard formats, or type in a name combination.
5. Select OK.

   If you typed a nonstandard name format in Step 4, the format is not saved in the Format list as a standard option.
6. To select another name format, go to the Name Format tab, select the format, and then select OK.

13

Editing Your Toolbar

Introduction

This chapter teaches you how to use the **Add Button** tool to create custom buttons for the toolbar, how to use the **Remove Button** tool to remove buttons from the toolbar, and how to reorganize the buttons on the toolbar.

The sections in this chapter are as follows:

- About the **Add Button** and **Remove Button** Tools
- Adding a Button to the Toolbar
- Editing a Button
- Removing a Button from the Toolbar
- Rearranging Buttons on the Toolbar.

About the Add Button and Remove Button Tools

You can use the **Add Button** and **Remove Button** options on the Tools menu to add and remove buttons, which represent Supervisor actions, to the toolbar.

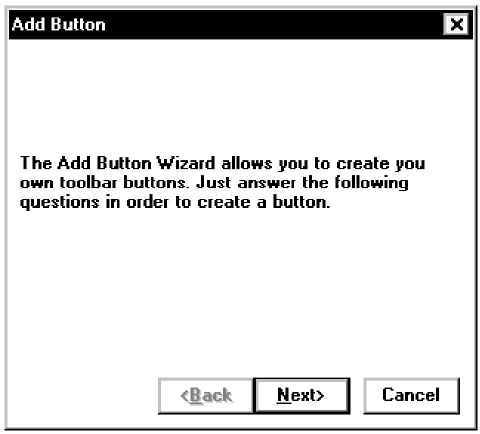
The set of tool buttons on your toolbar are defined based on your user permissions. This is true for the standard buttons, as well as for buttons you can customize.

When you login through Supervisor on a particular workstation for the first time, the tools on your toolbar are standard buttons. For example, some of the buttons may be as follows: Options, Logout, Reports, ACD Administration, Dictionary, Exceptions, and User Permissions.

Adding a Button to the Toolbar

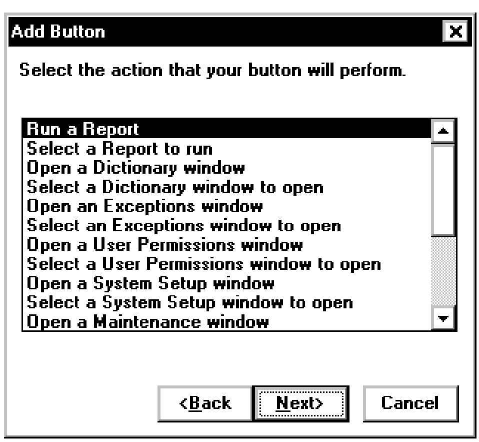
You can add a standard or custom toolbar button to the toolbar using the Add Button wizard. To add a button to the toolbar, do the following steps:

1. Select **Add Button** from the **Tools** menu. The first window in the Add Button wizard displays:



2. Select **Next>**.

3. Select the action that the button you are creating will perform.

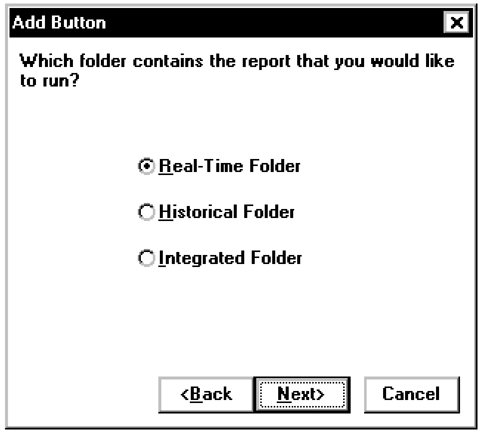


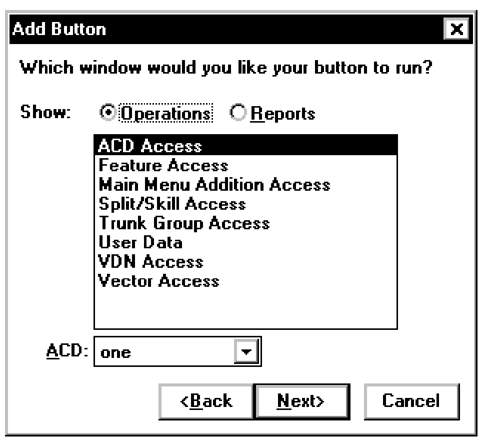
You can choose from the following selections:

- **Run a ...** —selecting the “Run a ...” action creates a button that starts a specific report from the **Reports** command.
- **Select a ...** — the “Select a ...” actions are the buttons that automatically appear on your toolbar. Unless you have previously removed one of these buttons from your toolbar, you will not be able to select them from this list.
- **Open a ...** — choosing one of the “Open a ...” actions creates a button that starts an operation or a report from the **Dictionary**, **Exceptions**, or **ACD Administration** commands or from the **CMS System Setup**, **Maintenance**, or **User Permissions** tools.

4. Select **Next>**.

Depending on the type of action you selected ("Run a ..." or "Open a ... window"), one of the following types of windows displays.





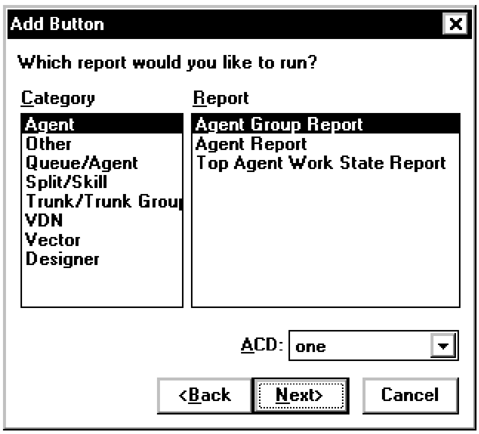
5. Select the appropriate radio button (Real-Time, Historical, or Integrated for the "Run a ..." action, or Operations or Reports for the "Open a ... window" action).

   If you are creating a button for the "Open a ... window" action, select the operation or report that you want the button to access.

6. Select **Next>**.

7. If you are creating a button for the "Open a ... window" action, go to Step 8.

   If you are creating a button for the "Run a ..." action, the following window displays:

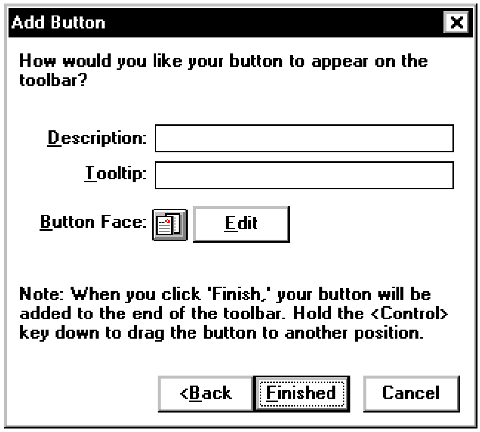


   a. Select the report **Category** and the **Report**.

   b. Select the ACD for which you would like to run the report.

   c. Select **Next>**.

The following window displays:



8. Type in the Description that you want to display in the status bar for this button.

9. Tab to the Tooltip text box.

10. Type a one- or two-word description of the button, which will display as the tooltip when the mouse cursor is stopped on top of the button on the toolbar.

11. If you want to accept the default **Button Face** as the graphic for this button, select **Finished**.

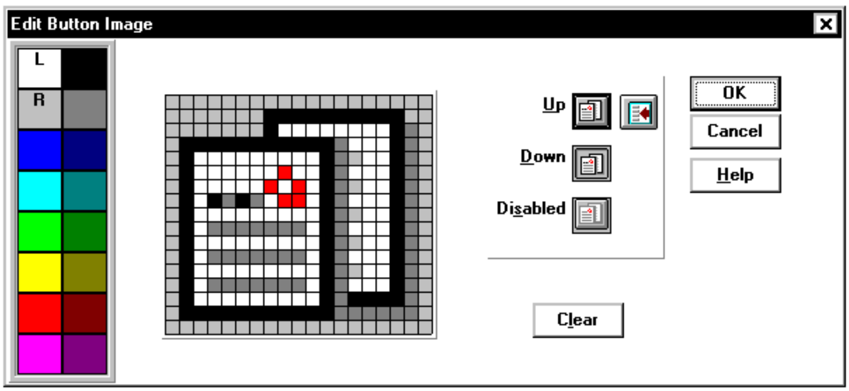
    The button is now available on your toolbar.

    If you want to edit the **Button Face**, select **Edit**, and see the “Editing a Button” section in this chapter for instructions on editing a toolbar button.

Editing a Button

You can define the design (paint) of any custom buttons that you define in Supervisor. To paint a custom button, do the following steps:

1. Select **Edit** Button Face option in the **Add Button** wizard.
2. The Edit Button Image window displays:



3. Position the mouse cursor over the primary color you will use to paint the button.
4. Click the left mouse button one time. The “L” moves to that color.
5. Position the mouse cursor over the secondary color you will use to paint the button.
6. Click the right mouse button one time. The “R” moves to that color.
7. Paint the grid using the colors you have selected (you can change colors at any time), using the following editing tools:
   - **Left mouse button**: Hold down the left mouse button and move the cursor over the areas of the grid that you would like to paint the primary color.

- **Right mouse button**: Hold down the right mouse button and move the cursor over the areas of the grid that you would like to paint the secondary color.
- **Clear button**: Select the **Clear** button to clear the current picture of the button. You can start over from this point.
- **Up button**: Select the **Up** button to paint the picture for this button when it is in the "Up" position. The "Up" position is what the button looks like when it is available, but not selected.
- **Down button**: Select the **Down** button to paint the picture for this button when it is in the "Down" position. The "Down" position is what the button looks like when you click on it from the toolbar.
- **Disable button**: Select the **Disable** button to paint the picture for this button when the operation or report is not currently available.

8. Once you have completed painting the button, select OK.

   You are returned to the final window in the Add Button wizard.

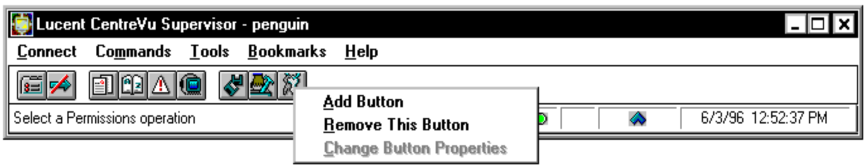
9. Select **Finished** to save the changes you have made to the button and exit the **Add Button** wizard.

   The button is now available on your toolbar.

Removing a Button from the Toolbar

You can remove a button from the toolbar by doing the following steps:

1. Move the mouse cursor so that it is over the button you want to remove.
2. Right-click your mouse to display the menu.



3. Select **Remove This Button**.

   The button is deleted from the toolbar.

Rearranging Buttons on the Toolbar

You can rearrange the order in which buttons appear on the Controller toolbar using the drag-and-drop method (click on a button, hold the mouse button down, drag your cursor to the position in which you want the button to be located, and release the mouse button).

You can rearrange the order in which buttons appear on the toolbar and add spaces between buttons using the following steps:

1. Move the mouse cursor so that it is over the button that you want to move.
2. Hold down your CTRL key.
3. Press the left mouse button and move the cursor to the position where you want the button to be placed.
4. Release the mouse button and then the CTRL key.

   The button is moved.

Note The toolbar buttons are positioned starting on the left side of the toolbar. You can move buttons just to the right of the last button, but not all the way to the right of the toolbar.

Tools | Add Button and Remove Button

14

Bookmarks

Introduction

This sections in this chapter are as follows:

- About Bookmarks
- Adding Bookmarks
- Deleting Bookmarks
- Editing Bookmarks.

About Bookmarks

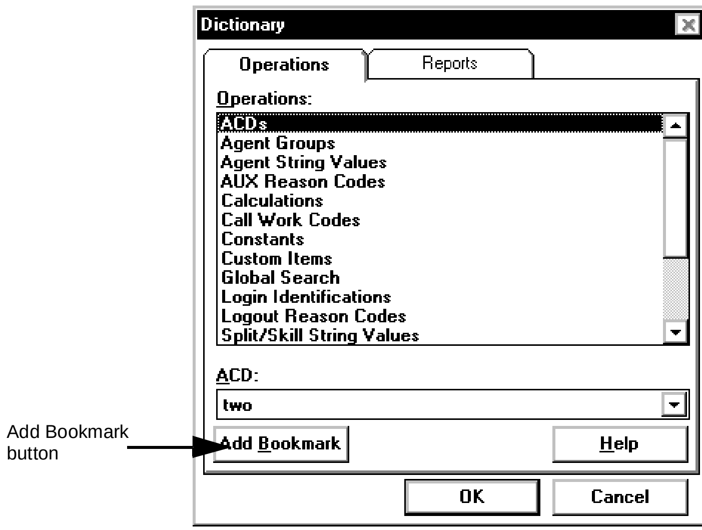
Bookmarks offer a shortcut to running operations and reports. Once you add a bookmark, it is always available to you until you remove it using the Edit Bookmarks window.

Because bookmarks are so useful, Supervisor offers many options for organizing your bookmark list. You can add bookmarks to a standard list, then create hierarchical menus (folders) and separators to organize the bookmarks.

- Select the **Add Bookmark** button on any selector window to add the current report or operation to the Bookmarks menu. Each time you add a bookmark, the title of the window associated with the bookmark is appended as a menu item in the Bookmarks menu. Simply select the title to display the window on your screen.
- Choose **Bookmarks** | **Edit Bookmarks** to display the Edit Bookmarks window. The Edit Bookmarks window is where you can organize and maintain your bookmarks list.

Adding Bookmarks

To add a bookmark from any selector window, simply highlight the report/operation for which you want to assign a bookmark and then click the **Add Bookmark** button.

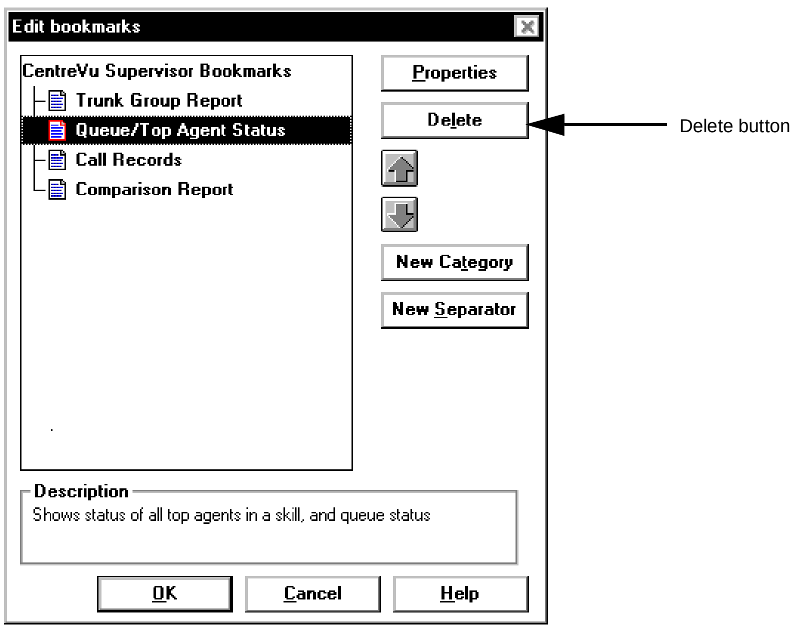


When you select the bookmark from the Bookmarks menu, you will automatically be taken to the input window for the report/operation of that bookmark.

Deleting Bookmarks

To delete a bookmark from your list of bookmarks, do the following steps:

1. Select **Edit Bookmarks** from the Bookmarks menu.
2. On the Edit bookmarks window, highlight the bookmark you want to delete.
3. Select the **Delete** button or select the delete key on your keyboard.



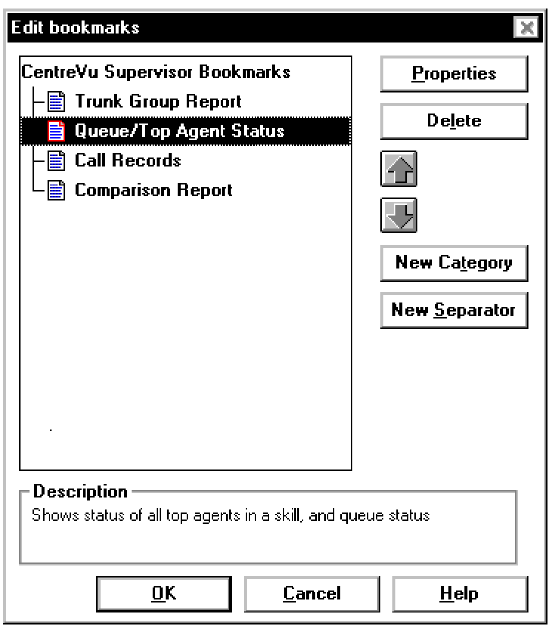
Editing Bookmarks

The Edit Bookmarks window contains icons and folders to help you organize your bookmarks. Each bookmark icon corresponds to a menu item. each bookmark icon in a folder corresponds to a menu item under a header (a hierarchical or multilevel menu). Folders can be nested in other folders.

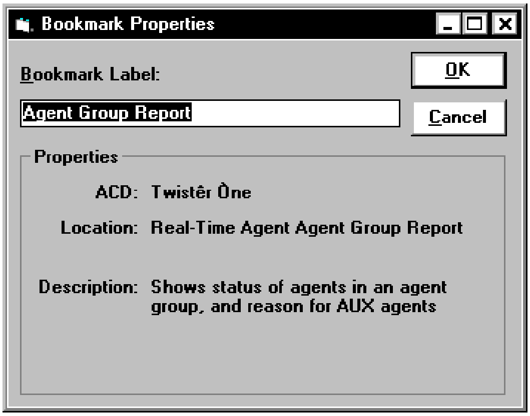
Use the Edit Bookmarks window in the following ways:

- Double click on a bookmark to access the Bookmark Properties window.
- To build a hierarchical menu, create a folder in the Edit Bookmarks window by selecting the New Category button and then using drag-and-drop to move bookmarks into the category.

Any changes you make to your bookmarks are saved and immediately available.



- **Properties** — displays the Properties window as shown below:



- **Delete** — deletes the currently selected bookmark.
- **Up arrow** — moves the selected bookmark up in the list, one position per click.
- **Down arrow** — moves the selected bookmark down in the list, one position per click.
- **New Category** — lets you add a new folder above the current selection. To rename the folder, highlight it and then select the Properties button.
- **New Separator** — creates a SEPARATOR line above the current selection in the list.

Putting bookmarks in folders

To create an hierarchical (cascading) bookmark menu, complete the following steps:

1. Choose the Bookmarks | Edit Bookmarks menu item to view the Edit Bookmarks window.
2. Click on the bookmark icon below where you want to position a new folder. Each folder represents a level (header) in a hierarchical (cascading) pull-down menu.
3. Select the New Category button. A folder titled “New Category” is inserted in the bookmarks list.
4. Leave the “New Category” folder highlighted and select the Properties button.

   The Bookmark Properties window displays.
5. Type the name you want to assign to the folder, and then select OK.

   You are returned to the Edit bookmarks window.
6. Highlight the first bookmark you want to move into the new folder. Use the up / down arrows to position the bookmark under the folder. You will notice that it is now indented from the level of the folder. The new folder is now displayed in your list of bookmarks. To see the bookmarks in the folder, click on the folder name.

   When you are done arranging the bookmarks, select the OK button.

15

Real-Time Report Descriptions

Introduction

The sections in this chapter are as follows:

- About Real-Time Reports
- Agent—Graphical Information
- Agent—Information
- Split/Skill—Graphical AUX Agents
- Split/Skill—Graphical AUX Top Agents
- Split/Skill—Graphical Call Profile
- Split/Skill—Graphical EWT
- Split/Skill—Graphical Queue
- Split/Skill—Graphical Status
- Split/Skill—Graphical Top Skill Status
- Split/Skill—Top Agent Work State
- Split/Skill—Work State
- VDN—Graphical Call Profile.

About Real-Time Reports

There are a series of Real-Time Supervisor reports that are available only when you are using the Supervisor application (they are not available through Terminal or standard CMS).

Only reports that are available exclusively through Supervisor are described in this chapter. For descriptions of CMS reports that are not described in this chapter, see the *CentreVu™ CMS Real-Time and Historical Reports* document (585-215-821).

For general information about Historical reports, see Chapter 4, “Reports Basics,” and Chapter 5, “Reports”.

The Real-Time reports are identified in the following table:

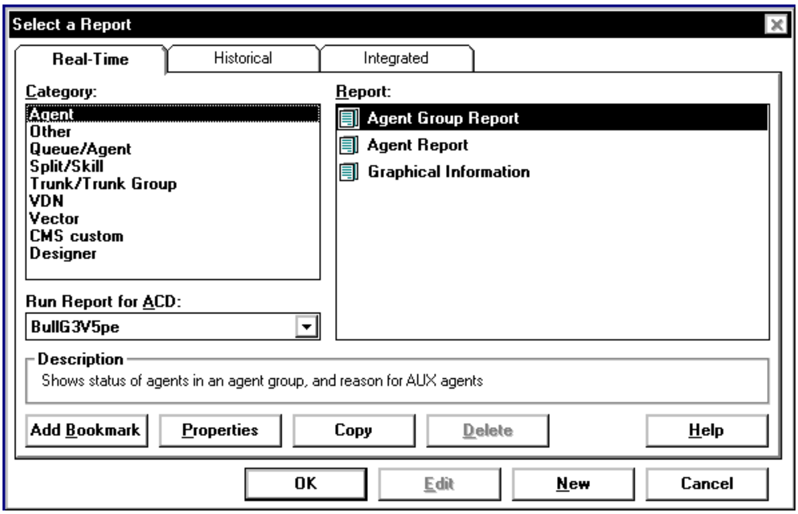
Category	Report Name	Real-Time	Historical	Integrated
Agent	Graphical Information	❑		❑
	Information	❑		❑
Split/Skill	Comparison			❑
	Graphical ASA		❑	
	Graphical AUX Agents	❑		
	Graphical AUX Top Agents	❑		
	Graphical Call Profile	❑	❑	
	Graphical EWT	❑		
	Graphical Queue	❑		
	Graphical Service Level		❑	
	Graphical Skill Time Spent		❑	
	Graphical Split/Skill View			❑
	Graphical Status	❑		
	Graphical Time Spent		❑	
	Graphical Top Skill Status	❑		
	Top Agent Work State	❑		
	Work State Report	❑		

Category	Report Name	Real-Time	Historical	Integrated
VDN	Graphical Call Handling			❑
	Graphical Call Profile	❑	❑	
	Graphical Service Level		❑	

Note “Graphical ....” reports may not be available on the Real-Time Report tab if they are not valid for your switch type or the features you purchased.

Real-Time Agent Category Tab

The following is an example of the reports that may be available in the Agent Category from the Real-Time Report tab depending on your switch type and if you have purchased the EAS or Vectoring feature.



Agent—Graphical Information

This report shows real-time information and statistics for the specified agent.

Things to Know About This Report

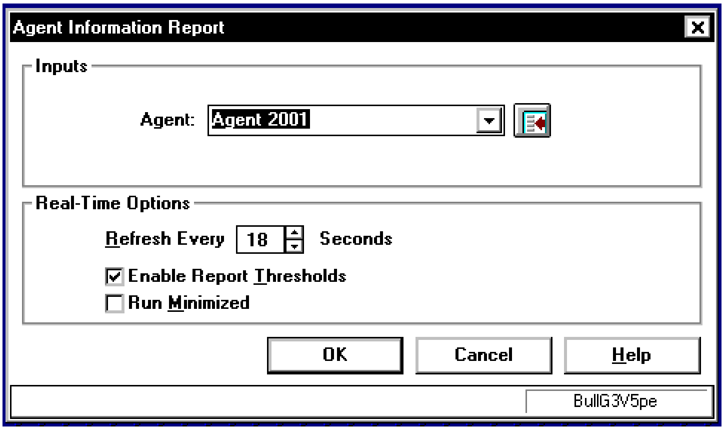
- You can access this report in the following ways:
  - From the Real-Time Agent Category selector menu.
  - By drilling down to this report from the Agent Name or Login ID fields on other reports (for example, Agent Information, Work State, or Graphic AUX Agent reports).
- Supervisors can use this report to access further information on one particular agent without having to execute several steps and several different reports to get the pertinent information. This report enables the supervisor to quickly make a more educated decision on whether an agent should be added to or removed from a skill.
- This report is available for all switch releases. The contents of this report depends upon the switch release for which it is being run.
- The following example of this report shows the information it will contain for the *DEFINITY* ® Enterprise Communications Server (ECS) Release 5 switch:
  - Graphical information:

    A three-dimensional vertical bar chart, with time (in minutes) along the y-axis, and agent work states along the x-axis. The chart shows how much time (in minutes) during the current interval the agent spent in each of the work states. By default, no legend accompanies the chart.
  - Grid information:

    A grid shows the skill that are assigned to the agent, and the skill level (if ECS switch with EAS) or the priority level with “1” representing the primary level, and “2” representing the secondary level (if using a pre-ECS switch with the EAS feature).

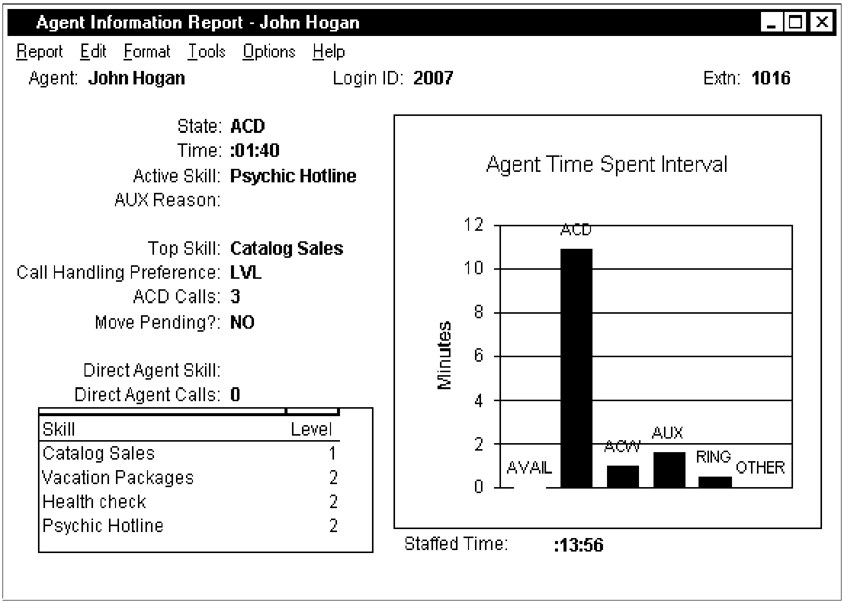
    A scroll bar is displayed only if the number of skills to which the agent is assigned exceeds what can be displayed in the grid.
  - Real-Time report status.

Input Window



Item	Description
Agent:	Enter the name of the agent. The agent's name must be defined in the Dictionary subsystem, otherwise you will see the agent IDs.
Refresh Every <#> Seconds	Enter the number of seconds (3 to 600) to specify how rapidly *CentreVu* Supervisor should update the report data. The default for the Refresh rate in seconds: field in this window is your assigned minimum refresh rate plus 15 seconds. To find out what your minimum refresh rate is, or to change it, check with your *CentreVu* CMS administrator.
Enable Report Thresholds	Check this box to turn on the thresholds for the report. For more information, see the "Setting Report threshold Highlights" section in Chapter 5, "Reports."
Run Minimized	Check this box to minimize the report.

Report Example



Report Heading	Description	Database Item/ Calculation, Table Name
Agent:	The names (or agent ID if the names have not been assigned in Dictionary) of the agent.	syn(LOGID) cagent
Login ID:	The login identification of the agent.	LOGID cagent
Extn:	The extension that the agent logged in from.	EXTENSION cagent
State:	The current work mode (state) that the agent is in (AVAIL, ACD, ACW, AUX, DACD, DACW, RING, UNKNOWN, OTHER, UNSTAFF) and the call direction (blank, IN or OUT).	(syn)AWORKMODE and (syn)DIRECTION cagent

Report Heading	Description	Database Item/ Calculation, Table Name
Time:	Amount of time the agent has been in the current work mode (AVAIL, ACD, etc.) and the call direction. Time is zeroed whenever the work mode or call direction changes. That is, if the agent goes from ACD-IN to AVAIL, time starts over.	AGTIME cagent
Active Skill:	The skill is active when the agent is: • On a split / skill, on a direct agent ACD call, or in ACW—this is the split / skill associated with the call or ACW. • Available, in AUX or in OTHER states, this is null (blank). • On an AUXIN / AUXOUT call—this is the OLDEST_LOGON split / skill. • On an AUXIN / AUXOUT call from the available state, while in AUX or with an AUXIN / AUXOUT call from the available state, while in AUX or with an AUXIN / AUXOUT call on hold—this is the OLDEST_LOGON split / skill. • On an AUXIN call with an ACD call on hold—this is the OLDEST_LOGON split / skill. • On an AUXOUT call with an ACD call on hold—this is the split / skill associated with the ACD call. WORKSKILL differs from WORKSPLIT only in the case that the agent is available. In this case, WORKSKILL will be blank and WORKSPLIT will contain one of the splits / skills in which the agent is available.	syn(WORKSKILL) cagent

Report Heading	Description	Database Item/ Calculation, Table Name
AUX Reason:	For ECS switch releases, this is the reason code associated with the auxiliary work state (on a break, in a meeting, and so on) of this agent. This field is blank if the agent is not in the AUX state.	syn(AUXREASON) cagent
Top Skill:	The agent's first-administered, highest-level, measured skill, where skill level 1 is the highest, skill level 16 is the lowest.	syn(TOPSKILL) cagent
Call Handling Preference:	The agent's call handling preference. Values are blank, skill level (LVL) or greatest need (NEED).	syn(PREFERENCE) cagent
ACD Calls:	The ACD calls that were queued to the split/skill and answered by an agent during the current interval. This does not include direct agent calls, but it does include ACD calls placed by an adjunct (also called outbound predictive dialing), for the Generic 2.2 switches with ASAI Gateway or the Generic 3 with ASAI only.	sum(ACDCALLS) cagent
Move Pending?:	A move to a new split or skill or a change of skills is pending for this agent. This is available only for Generic 3 Version 4 and later switch releases with the "Move Agent While Staffed" feature.	MOVEPENDING cagent
Direct Agent Skill:	The skill currently assigned as the agent's direct agent skill. Direct agent calls to the agent are queued to this skill.	syn(DA_SKILL) cagent
Direct Agent Calls:	The total number of split/skill and direct agent calls (Generic 3 switches only) that have been answered by this agent during the current interval. This is the number of calls that the agent answered, not the number of calls for which the agent counted an event.	sum(DA_ACDCALLS) cagent

Report Heading	Description	Database Item/ Calculation, Table Name
Skill	The split number that this EXTENSION is assigned to or the skill number that the agent logged into.	syn(SPLIT) cagent
Level	The skill level (1-16) associated with the SPLIT.	LEVEL cagent
AVAIL	The time during the collection interval that the agent was in the available state for split/skill.	sum(TI_AVAILTIME) cagent
ACD	The total time during the collection interval that the agent was talking on ACD calls.	sum (<TOTAL_I_ACDTIME>) cagent
ACW	The total time during the collection interval that the agent was in after call work (ACW). This includes ACW for split/skill ACD calls and ACW not associated with the call.	sum(<TOTAL_I_ACWTIME> cagent)
AUX	The total time during the collection interval that the agent was in the AUX work state in all splits/skills or on AUXINCALLS or AUXOUTCALLS.	sum(TI_AUXTIME) cagent
RING	The time during the collection interval that the agent had split/skill and direct agent ACD calls ringing.	sum(I_RINGTIME) cagent

Report Heading	Description	Database Item/ Calculation, Table Name
OTHER	The time during the collection interval that the agent was doing other work in all splits/skills. For Generic 3 switches, while in Auto-in or Man-In: the agent put any call on hold and performed no further action, the agent dialed to place a call or to activate a feature, or an extension call rang with no other activity. For Generic 2.2 switches, the agent pushed the Hold button or flashed the switchhook from auto-in or manual-in mode and performed no further action. For all switches, TI_OTHERTIME is collected for the time period after the link to the switch comes up or after the agent logs in and before the CMS receives notification of the agent's state from the switch. The "TI_" time is stored only for the split/skill logged into the longest. "TI_" time needs to be summed across the splits/skills the agents may log into, in case the logon order changes during the collection interval.	sum(TI_OTHERTIME) cagent
Staffed Time:	The time during the collection interval that the agent was staffed in any split/skill. "TI_" time is recorded only for the split/skill logged into the longest amount of time. "TI_" time needs to be summed across the splits/skills the agents may log into, in case the login order changes during the collection interval.	sum(TI_STAFFTIME) cagent

Agent—Information

This report shows real-time information and statistics for the specified agent.

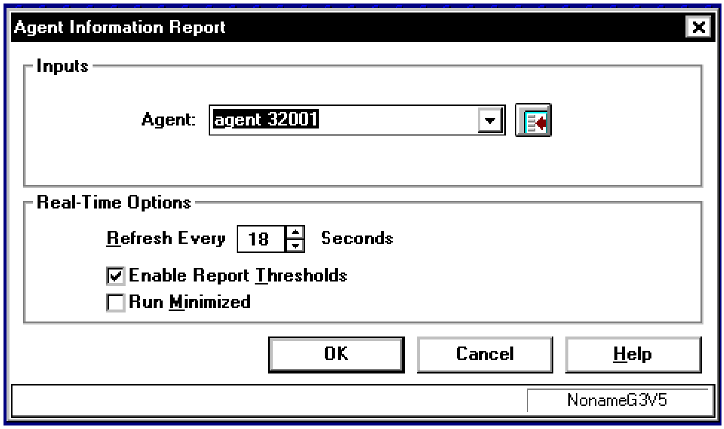
Things to Know About This Report

- This version of the Agent Information report is for non-EAS users.
- You can access this report as follows:
  - — From the Real-Time Agent Category selector menu.
  - — By drilling down from the Agent Name or Login ID fields on other reports (for example, Agent, Agent Group, Graphical AUX Agents Report, Graphical AUX Top Agents Report, or other Real-Time and Integrated reports).
- Whenever you drill down to the Real-Time Agent Information report, you can also drill down to the Integrated Agent Information report by clicking the right mouse button.
- From this report, you can drill down to the Work State or Top Agent Work State reports.
- This report includes a grid that shows all the splits which the agent is logged into.

  Note If the agent is assigned to additional splits, but is not logged into those splits, these will not be reflected in this grid.

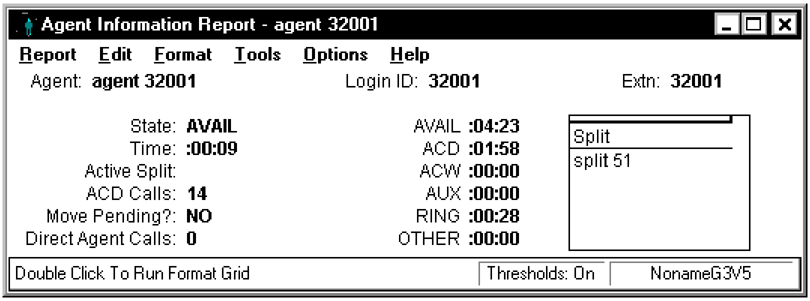
- When this report is accessed from the report selector menu, you need to enter the Agent Name and Login ID input fields.
- When this report is accessed from another report by drilling down, the input fields will be defaulted from the report you are drilling down from.

Input Window



Item	Description
Agent:	Enter the name of the agent. The agent's name must be defined in the Dictionary subsystem; otherwise, you will see the agent Login IDs.
Refresh Every <#> Seconds	Enter the number of seconds (3 to 600) to specify how rapidly *CentreVu* CMS should update the report data. The default for the Refresh rate in seconds: field in this window is your assigned minimum refresh rate plus 15 seconds. To find out what your minimum refresh rate is, or to change it, check with your *CentreVu* CMS administrator.
Enable Report Thresholds	Check this box to turn on the thresholds for the report. For more information, see the "Setting Report threshold Highlights" section in Chapter 5, "Reports."
Run Minimized	Check this box to minimize the report.

Report Example



Report Heading	Description	Database Item/ Calculation, Table Name
Agent:	The names (or agent ID if the names have not been assigned in Dictionary) of the agent.	syn(LOGID) cagent
Login ID:	The login identification of the agent.	LOGID cagent
Extn:	The extension that the agent logged in from.	EXTENSION cagent
State:	The current work mode (state) that the agent is in (AVAIL, ACD, ACW, AUX, DACD, DACW, RING, UNKNOWN, OTHER, UNSTAFF) and the call direction (blank, IN or OUT).	syn(AWORKMODE) and syn(DIRECTION) cagent
Time:	The time that the agent has been in the current work mode (AVAIL, ACD, etc.) and the call direction. Time is zeroed whenever the work mode or call direction changes. That is, if the agent goes from ACD-IN to AVAIL, time starts over.	AGTIME cagent

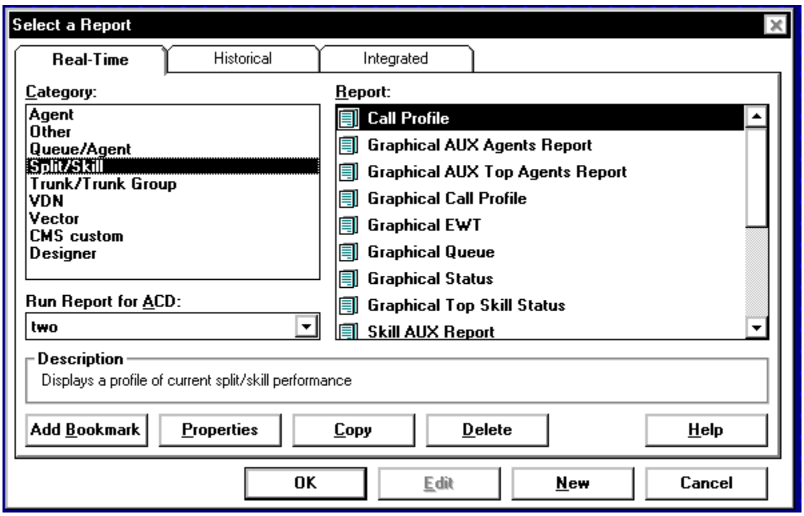
Report Heading	Description	Database Item/ Calculation, Table Name
Active Split:	The split is active when the agent is: • On a split/skill, on a direct agent ACD call, or in ACW—this is the split/skill associated with the call or ACW. • Available, in AUX or in OTHER states, this is null (blank). • On an AUXIN/AUXOUT call—this is the OLDEST_LOGON split/skill. • On an AUXIN/AUXOUT call from the available state, while in AUX or with an AUXIN/AUXOUT call from the available state, while in AUX or with an AUXIN/AUXOUT call on hold—this is the OLDEST_LOGON split/skill. • On an AUXIN call with an ACD call on hold—this is the OLDEST_LOGON split/skill. • On an AUXOUT call with an ACD call on hold—this is the split/skill associated with the ACD call. WORKSKILL differs from WORKSPLIT only in the case that the agent is available. In this case, WORKSKILL will be blank and WORKSPLIT will contain one of the splits/skills in which the agent is available.	syn(WORKSKILL) cagent
ACD Calls:	The ACD calls that were queued to the split/skill and answered by the agent. This does not include direct agent calls, but it does include ACD calls placed by an adjunct (also called outbound predictive dialing), for the Generic 2.2 switches with ASAI Gateway or the Generic 3 with ASAI only.	sum(ACDCALLS) cagent

Report Heading	Description	Database Item/ Calculation, Table Name
Move Pending?:	A move to a new split is pending for this agent. This is available only for Generic 3 Version 4 and later switch releases with the “Move Agent While Staffed” feature.	MOVEPENDING cagent
Direct Agent Calls:	The number of split and direct agent calls (Generic 3 switches only) that the agent answered during the current interval. This is the number of calls that the agent answered, not the number of calls for which the agent counted an event.	sum(DA_ACD CALLS) cagent
AVAIL	The time during the collection interval that the agent was in the available state for split or direct agent ACD calls in any split.	sum(TI_AVAIL TIME) cagent
ACD	The time during the collection interval that the agent was talking on ACD calls for the SPLIT.	sum (<TOTAL_I_ACD TIME>) cagent
ACW	The time during the collection interval that the agent was in after call work (ACW). This includes ACW for split ACD calls and ACW not associated with the call.	sum(<TOTAL_I_ ACWTIME> cagent)
AUX	The time during the collection interval that the agent was in the AUX work state in all splits or on AUXINCALLS or AUXOUTCALLS.	sum(TI_AUXTIME) cagent
RING	The time during the collection interval that the agent had split and direct agent ACD calls ringing.	sum(I_RINGTIME) cagent

Report Heading	Description	Database Item/ Calculation, Table Name
OTHER	The time during the collection interval that the agent was doing other work in all splits. For Generic 3 switches, while in Auto-in or Man-In: the agent put any call on hold and performed no further action, the agent dialed to place a call or to activate a feature, or an extension call rang with no other activity. For Generic 2.2 switches, the agent pushed the Hold button or flashed the switchhook from Auto-in or Manual-in mode and performed no further action. For all switches, TI_OTHERTIME is collected for the time period after the switch comes up or after the agent logs in and before the CMS receives notification of the agent's state from the switch. The "TI_" time is stored only for the split/skill logged into the longest. "TI_" time needs to be summed across the splits/skills the agents may log into, in case the logon order changes during the collection interval.	sum(TI_OTHER TIME) cagent
Staffed Split(s)	The split number(s) that this extension is assigned to or the split number(s) that the agent logged into.	syn(SPLIT) cagent

Real-Time Split/Skill Category Tab

The following is an example of the reports that may be available in the Split / Skill Category from the Real-Time Report tab depending on your switch type and whether you have purchased the EAS or Vectoring feature.



Split/Skill—Graphical AUX Agents

This report, which is available only with the ECS switch release, shows all agents with this skill who are in AUX, the reason, and the time in AUX.

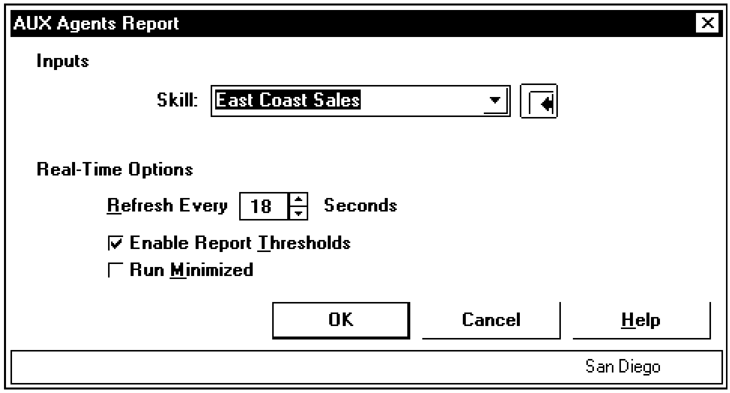
Things to Know About This Report

- You can access this report as follows:
  - — From the Real-Time Split/Skill Category selector menu.
  - — By drilling down from the AUX work state fields on other reports to this report (only available with ECS switches). All other switch/EAS configuration drills down to the Work State Report.
- From this report, you can drill-down to the Agent Information report from the "Agent Name" field.
- Call center supervisors can use this report to see which staffed agents are unavailable to take calls, and for what reason. The supervisor will also be able to see how long each agent has been unavailable for each of the reason codes. This will help the supervisor determine who will be available to answer calls if call volumes increase, and will also help to identify agents who are taking too long for breaks, lunch, etc.
- This report includes the following grid information:
  - — A row for each agent that is currently in the AUX work state for that skill.
  - — The agent's name, login ID, reason code, and the time in AUX since the agent entered AUX for that reason code.
  - — You can specify how you want to sort the agent's name, login ID, reason code, and time.
  - — You can use the scroll bar to see additional agents that are in the AUX state.
- This report shows the following two-dimension pie chart information for the number of agents in AUX for each reason code for that skill:

- The pie chart's legend shows the synonym for each reason code and its corresponding color of the pie.
- The number of agents are shown inside each slice of the pie.
- The legend is sorted in ascending order by the reason code number, with the customer-defined synonym for reason code 0 at the bottom.

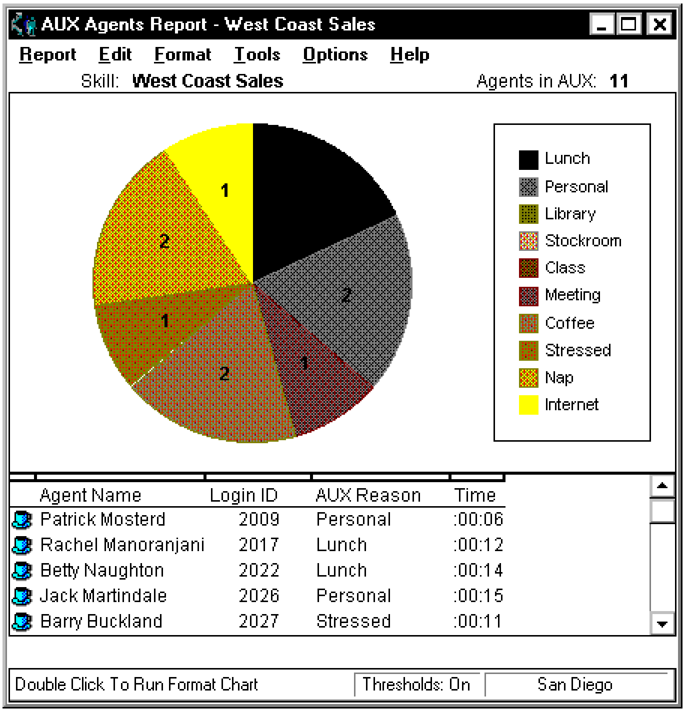
- The chart type can be changed. See the "Formatting Chart Reports" section in Chapter 4, "Reports Basics," for more information.

Input Window



Item	Description
Skill:	Enter the skill name or number that you want to view in this report. Any name(s) that you want to appear on the report must have been previously defined and entered in the Dictionary subsystem.
Refresh Every <number> Seconds	Enter the number of seconds (3 to 600) to specify how rapidly *CentreVu* CMS should update the report data. The default for the Refresh rate in seconds: field in this window is your assigned minimum refresh rate plus 15 seconds. To find out what your minimum refresh rate is, or to change it, check with your *CentreVu* CMS administrator.
Enable Report Thresholds	Check this box to turn on the thresholds for the report. For more information, see the “Setting Report threshold Highlights” section in Chapter 5, “Reports.”
Run Minimized	Check this box to minimize the report.

Report Example



Report Heading	Description	Database Item/ Calculation, Table Name
Skill:	The name or number of the skill (up to 20 characters) that is selected for this report.	syn(SPLIT) csplit
Agents in AUX:	The current number of positions that are in auxiliary work for this skill or on AUX-IN / AUX-OUT calls.	INAUX csplit
Reason Code 0	The current number of positions that are in auxiliary work with reason code zero (0) for this skill or on AUXIN / AUXOUT calls. Reason code 0 is for “system” AUX work when reason codes are active (ECS switches with EAS and later).	INAUX0 csplit

Report Heading	Description	Database Item/ Calculation, Table Name
Reason Code 1-9	The current number of positions that are in auxiliary work with each of the reason codes 1-9 for this skill (ECS switches and later).	INAUX1-9 csplit
Agent Name	The names (or agent IDs if the names have not been assigned in Dictionary) of the agents assigned to this split/skill and logged in.	syn(LOGID) cagent
Login ID	The login identification of the agent.	LOGID cagent
AUX Reason	The reason associated with the auxiliary work state (on a break, in a meeting, and so on) of this agent. The agent will not appear in this report if the agent is not in the AUX work state.	syn(AUXREASON) cagent
Time	The time that has elapsed since the last agent WORKMODE changed for any split/skill. This item is not reset if the DIRECTION changes, but WORKMODE remains the same. For example, if the agent goes from AUX to AUXOUT to AUX, AGTIME continues without resetting.	AGTIME cagent

Split/Skill—Graphical AUX Top Agents

This report, which is available only with the ECS switch release, shows the top agents with this skill who are in AUX, the reason, and the time in AUX.

Things to Know About This Report

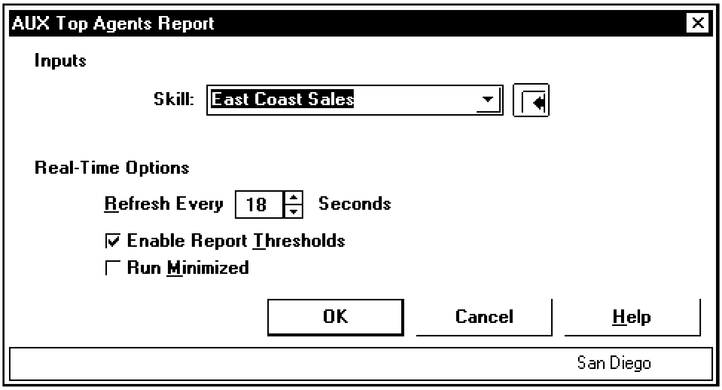
- You can access this report as follows:
  — From the Real-Time Split/Skill Category selector menu
  — By drilling down from the AUX or Top Agent AUX (csplit.TINAUX) work states on other top agent reports to this top agent report. This occurs only with ECS switches with EAS; otherwise, you drill down to the Top Agent Work State report.
- From this report, you can drill-down to the Agent Information report from the “Agent Name” field.
- Call center supervisors can use this report to see which top agents are unavailable to take calls, and for what reason. The supervisor will also be able to see how long each top agent has been unavailable for each of the reason codes. This will help the supervisor figure out who could be pulled in to answer calls if call volumes increase, and will also help to identify top agents who are taking too long for breaks, lunch, etc.
- A top agent for a skill is an agent who can be counted on to answer a call to that skill. An agent can have only one top skill and when an agent with a call handling preference skill level becomes available, the agent receives calls to this top skill. The agent receives calls to other skills only if no calls are waiting for the top skill.
- This report includes the following grid information:
  — A row for each top agent that is currently in the AUX work state for that skill.
  — The top agent’s name, login ID, reason code, and the time in AUX since the agent entered AUX for that reason code.
  — You can specify how you want to sort the agent’s name, login ID, reason code, and time.

  - You can use the scroll bar to see additional top agents that are in the AUX state.

- This report shows the following two-dimensional pie chart information for the number of agents in AUX for each reason code for that skill:
  - The pie chart's legend shows the synonym for each reason code and its corresponding color of the pie.
  - The number of agents are shown inside each slice of the pie.
  - The legend is sorted in ascending order by reason code number, with the customer-defined synonym for reason code 0 at the bottom.

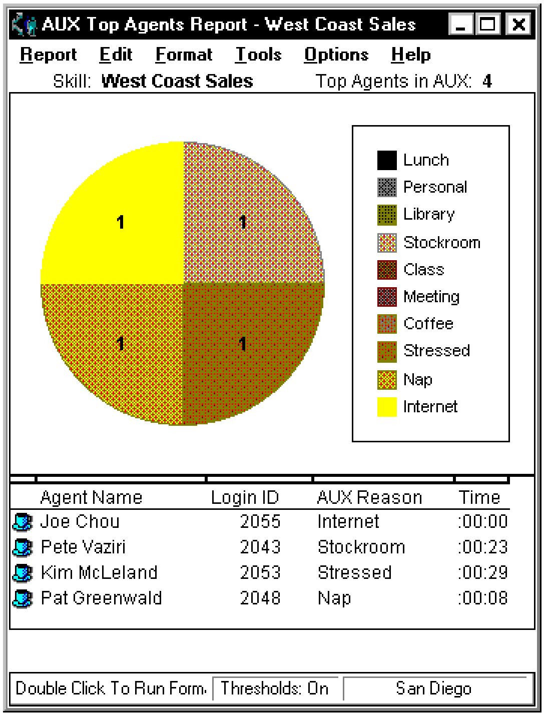
- The chart type can be changed. See the "Formatting Chart Reports" section in Chapter 4, "Reports Basics," for more information.

Input Window



Item	Description
Skill:	Enter the skill name or number that you want to view in this report. Any name(s) that you want to appear on the report must have been previously defined and entered in the Dictionary subsystem.
Refresh Every <number> Seconds	Enter the number of seconds (3 to 600) to specify how rapidly *CentreVu* CMS should update the report data. The default for the Refresh rate in seconds: field in this window is your assigned minimum refresh rate plus 15 seconds. To find out what your minimum refresh rate is, or to change it, check with your *CentreVu* CMS administrator.
Enable Report Thresholds	Check this box to turn on the thresholds for the report. For more information, see the “Setting Report threshold Highlights” section in Chapter 5, “Reports.”
Run Minimized	Check this box to minimize the report.

Report Example



Report Heading	Description	Database Item/ Calculation, Table Name
Skill:	The name or number of the skill (up to 20 characters) that is selected for this report.	syn(SPLIT) csplit
Top Agents in AUX:	The number of top agents logged into the skill who are in the AUX work mode. This includes agents on AUXIN / AUXOUT calls.	TINAUX csplit

Report Heading	Description	Database Item/ Calculation, Table Name
Reason Code 0	The number of top agents logged into the skill who are in AUX work for reason code 0 (zero) for this skill or on AUXIN / AUXOUT calls for AUX with reason code 0. Reason code “0” is for “system” AUX work when reason codes are active (ECS EAS and later Generic 3 EAS switches).	TINAUX0 csplit
Reason Code 1-9	The number of top agents logged into the skill who are in AUX work for each of the reason codes 1-9.	TINAUX1-9 csplit
Agent Name	The names (or agent IDs if the names have not been assigned in Dictionary) of the top agents assigned to this skill and logged in.	syn(LOGID) cagent
Login ID	The login identification of the agent.	LOGID cagent
AUX Reason	The reason associated with the auxiliary work state (on a break, in a meeting, and so on) of this agent.	syn(AUXREASON) cagent
Time	The time that has elapsed since the last agent WORKMODE changed for any split / skill. This item is not reset if the DIRECTION changes, but WORKMODE remains the same. For example, if the agent goes from AUX to AUXOUT to AUX, AGTIME continues without resetting.	AGTIME cagent

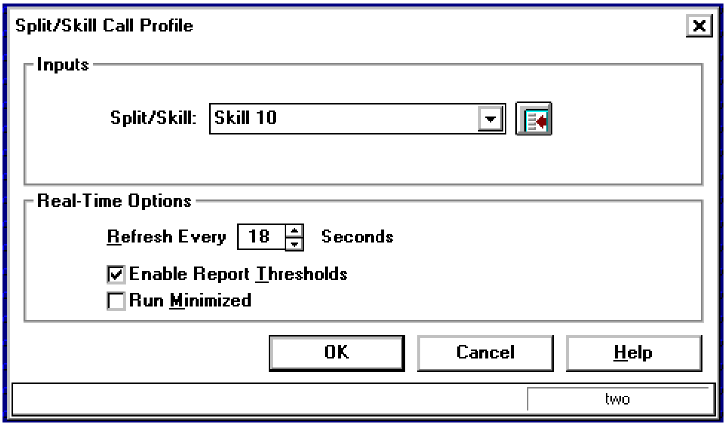
Split/Skill—Graphical Call Profile

This report shows how well the split/skill you specify is performing compared to your call center's predefined acceptable service level.

Things to Know About This Report

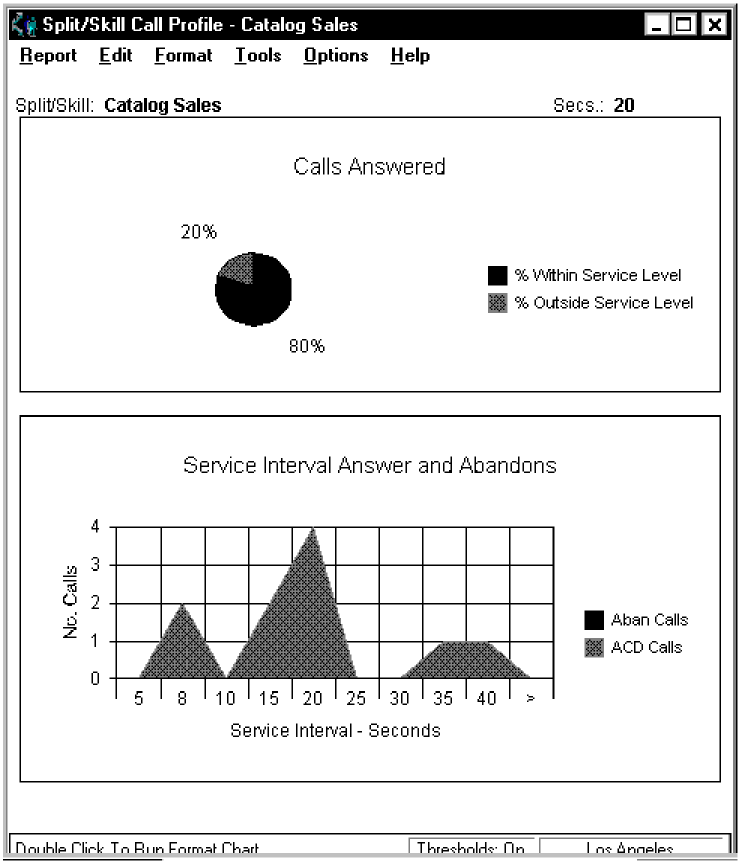
- You can access this report from the Real-Time Split/Skill Category selector menu.
- This report has two charts:
  - — The top chart, a three-dimensional pie chart, shows the percentage of ACD calls answered within the predefined acceptable service level and the percentage of ACD calls answered outside this level.
  - — The bottom chart, a stacked area graph, shows the number of answered and abandoned ACD calls within each service interval.
- The split/skill selected for the report and the predefined acceptable service level are displayed above the top chart. Legends appear to the right of each chart.
- On the bottom chart, the horizontal axis represents the service interval in seconds, and the vertical axis represents the number of ACD calls answered/abandoned within the acceptable service level.
- The number displayed for each service interval is the upper limit of the interval. For example, if the first two intervals are "3" and "5," the first data point on the graph indicates the number of calls answered/abandoned within 0-3 seconds, and the second data point indicates the number of calls answered/abandoned within 4-5 seconds.
- The chart type can be changed. See the "Formatting Chart Reports" section in Chapter 4, "Reports Basics," for more information.

Input Window



Item	Description
Split/Skill	Enter the appropriate split/skill name. Any name you want to appear on the report must have been previously defined and entered in the Dictionary subsystem.
Refresh Every <#> Seconds	Enter the number of seconds (3 to 600) to specify how rapidly *CentreVu* CMS should update the report data. The default for the Refresh rate in seconds: field in this window is your assigned minimum refresh rate plus 15 seconds. To find out what your minimum refresh rate is, or to change it, check with your *CentreVu* CMS administrator.
Enable Report Thresholds	Check this box to turn on the thresholds for the report. For more information, see the “Setting Report threshold Highlights” section in Chapter 5, “Reports.”
Run Minimized	Check this box to minimize the report.

Report Example



Report Heading	Description	Database Item/ Calculation, Table Name
Split/Skill:	The name of the split/skill selected for this report.	syn(SPLIT) csplit
Secs:	The number of seconds within which calls must be answered in order to be considered acceptable for this split/skill.	SERVICELEVEL csplit

Report Heading	Description	Database Item/ Calculation, Table Name
% Within Service Level	The percentage of split/skill ACD calls that were answered by an agent within the predefined acceptable service level. Calls to the split/skill include abandoned calls, calls not answered, and outbound ACD calls placed by an adjunct (for example, Outbound predictive dialing—Generic 2.2 switches with ASAI Gateway Interface feature or Generic 3 switches with the ASAI feature). Calls that were not answered may include forced busy calls, forced disconnect calls, calls redirected to another destination, and calls queued to more than one split and answered in another split/skill. For Generic 3 switches, Percent Within Service Level does not include direct agent calls.	<PERCENT_SERV_ LVL_SPL> csplit
% Outside Service Level	The percentage of split/skill ACD calls that were answered by an agent within the predefined acceptable service level. Calls to the split/skill include abandoned calls, calls not answered, and outbound ACD calls placed by an adjunct (for example, Outbound predictive dialing - Generic 2.2 switches with ASAI Gateway Interface feature or Generic 3 switches with the ASAI feature). Calls that were not answered may include forced busy calls, forced disconnect calls, calls redirected to another destination, and calls queued to more than one split and answered in another split/skill. For Generic 3 switches, Percent Within Service Level does not include direct agent calls.	<100- PERCENT_SERV_ LVL_SPL> csplit

Report Heading	Description	Database Item/ Calculation, Table Name
Aban Calls	The number of calls that were abandoned during the collection interval in each of the service level increments PERIOD1 through PERIOD9. ABNCALLS 10 counts calls that abandoned after PERIOD 9.	ABNCALLS1 csplit
ACD Calls	The number of CALLSOFFERED calls that are answered by an agent for this split/skill. ACDCALLS includes O_ACDCALLS.	ACDCALLS1 csplit

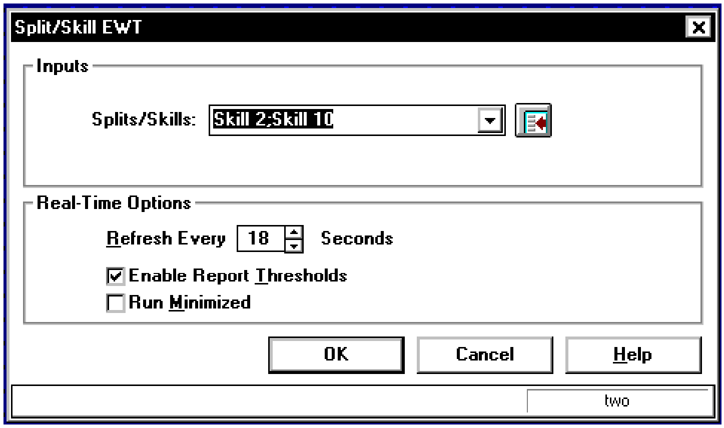
Split/Skill—Graphical EWT

This report shows the current Expected Wait Time (EWT) for one or more of the splits or skills you specify.

Things to Know About This Report

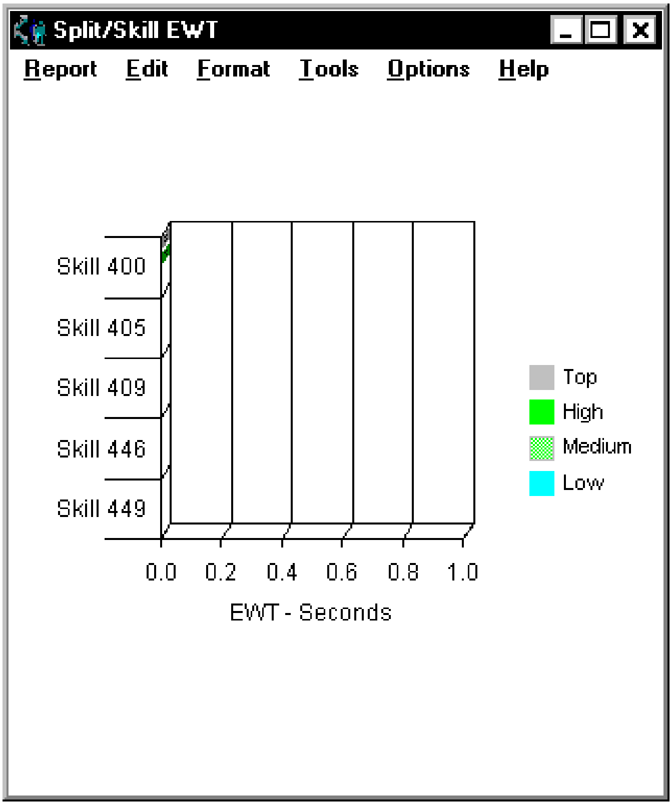
- This report is available only if you have a Generic 3 Version 4 or later version switch with the EWT option.
- You can access this report from the Real-Time Split/Skill Category selector menu.
- The vertical axis of the chart is labeled with the names or numbers of the splits or skills selected for the report.
- A legend appears to the right of the chart.
- The appearance of the report can be changed. See the “Formatting Chart Reports” section in Chapter 4, “Reports Basics,” for more information.

Input Window



Item	Description
Splits/Skills:	Enter the appropriate split/skill name(s). Any name you want to appear on the report must have been previously defined and entered in the Dictionary subsystem.
Refresh Every <#> Seconds	Enter the number of seconds (3 to 600) to specify how rapidly CentreVu CMS should update the report data. The default for the Refresh rate in seconds: field in this window is your assigned minimum refresh rate plus 15 seconds. To find out what your minimum refresh rate is, or to change it, check with your CentreVu CMS administrator.
Enable Report Thresholds	Check this box to turn on the thresholds for the report. For more information, see the “Setting Report threshold Highlights” section in Chapter 5, “Reports.”
Run Minimized	Check this box to minimize the report.

Report Example



Report Heading	Description	Database Item/ Calculation Table Name
Skill	Name or number of the split / skill selected for this report (X-axis of the graph).	syn(SPLIT) csplit

Report Heading	Description	Database Item/ Calculation Table Name
Top	Contains EWT for the split/skill at top priority. EWT is administered in the Exceptions subsystem. It is the wait time for the call if it were queued to the split/skill at this priority. EWT measures only the time it takes to deliver the call to an agent. It does not include ringing time. EWT is updated when a call is added to a queue, or every time the specified time interval is exceeded, whichever comes first. If CMS is connected to a pre-Generic 3 Version 4 switch or vectoring is not activated, the EWT headings and columns are displayed, but the fields are blank.	EWTTOP csplit
High	Contains EWT for the split/skill at high priority. EWT is administered in the Exceptions subsystem. It is the wait time for the call if it were queued to the split/skill at this priority. EWT measures only the time it takes to deliver the call to an agent. It does not include ringing time. EWT is updated when a call is added to a queue, or every time the specified time interval is exceeded, whichever comes first. If CMS is connected to a pre-Generic 3 Version 4 switch or vectoring is not activated, the EWT headings and columns are displayed, but the fields are blank.	EWTHIGH csplit

Report Heading	Description	Database Item/ Calculation Table Name
Medium	Contains EWT for the split/skill at medium priority. EWT is administered in the Exceptions subsystem. It is the wait time for the call if it were queued to the split/skill at this priority. EWT measures only the time it takes to deliver the call to an agent. It does not include ringing time. EWT is updated when a call is added to a queue, or every time the specified time interval is exceeded, whichever comes first. If CMS is connected to a pre-Generic 3 Version 4 switch or vectoring is not activated, the EWT headings and columns are displayed, but the fields are blank.	EWTMEDIUM csplit
Low	Contains EWT for the split/skill at low priority. EWT is administered in the Exceptions subsystem. It is the wait time for the call if it were queued to the split/skill at this priority. EWT measures only the time it takes to deliver the call to an agent. It does not include ringing time. EWT is updated when a call is added to a queue, or every time the specified time interval is exceeded, whichever comes first. If CMS is connected to a pre-Generic 3 Version 4 switch or vectoring is not activated, the EWT headings and columns are displayed, but the fields are blank.	EWTLOW csplit

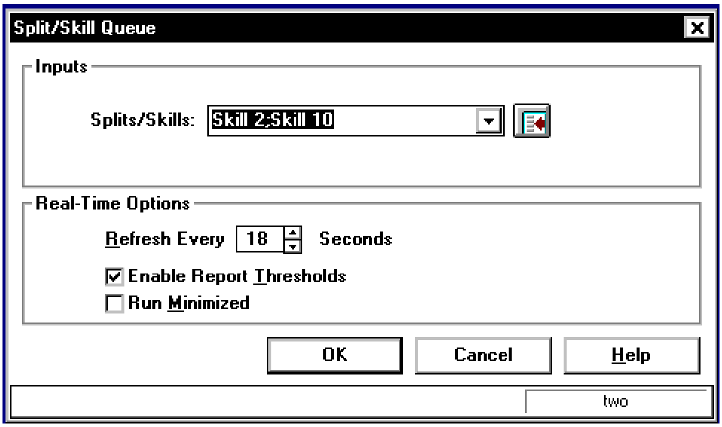
Split/Skill—Graphical Queue

This report shows the number of calls waiting in queue, the amount of time that the oldest call has waited in queue, and trending for one or more splits/skills.

Things to Know About This Report

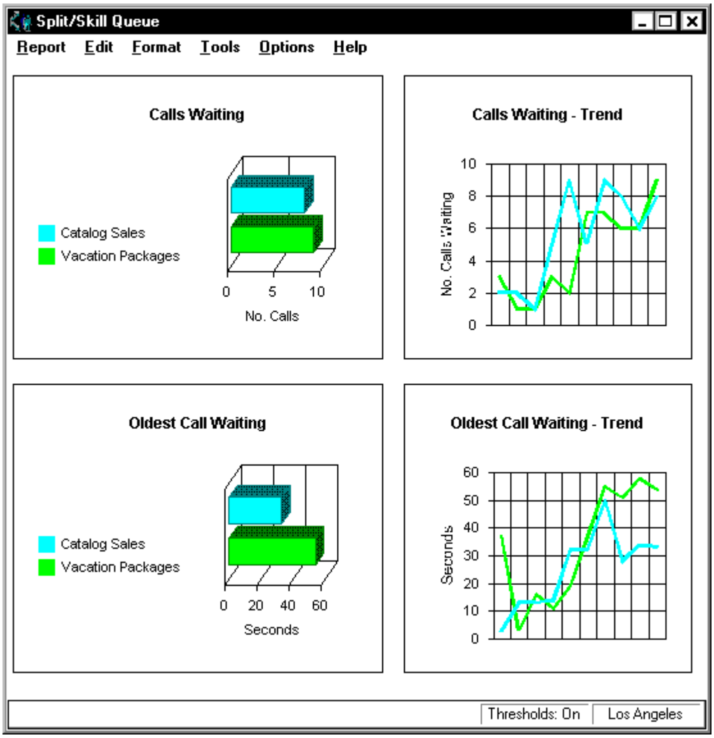
- You can access this report from the Real-Time Split/Skill Category selector menu.
- You can use this report to view trends of calls waiting for several splits/skills.
- The appearance of the report can be changed. See the “Formatting Chart Reports” section in Chapter 4, “Reports Basics,” for more information.
- This report has four charts. The two charts on the left side of the report show the number of Calls Waiting (upper left quadrant) and the Oldest Call Waiting (lower left quadrant). The two charts on the right side of the report show the trends for the last ten refresh intervals for the same data items. Two legends (in the left quadrant) display to the left of the rolling line charts to show which line corresponds to which split/skill.
- Each bar chart has a horizontal bar, labeled with the split/skill name or number, for each split/skill selected for the report. Each chart’s x-axis dynamically scales to the largest value of the items being reported. The x-axis of the Calls Waiting bar chart displays the number of calls (No. Calls) waiting in the split/skill queue. The x-axis of the Oldest Call Waiting bar chart displays the number of seconds the oldest call in the split/skill queue has waited.

Input Window



Item	Description
Splits/Skills:	Enter the appropriate split/skill name(s). Any name you want to appear on the report must have been previously defined and entered in the Dictionary subsystem.
Refresh Every <#> Seconds	Enter the number of seconds (3 to 600) to specify how rapidly *CentreVu* CMS should update the report data. The default for the Refresh rate in seconds: field in this window is your assigned minimum refresh rate plus 15 seconds. To find out what your minimum refresh rate is, or to change it, check with your *CentreVu* CMS administrator.
Enable Report Thresholds	Check this box to turn on the thresholds for the report. For more information, see the “Setting Report threshold Highlights” section in Chapter 5, “Reports.”
Run Minimized	Check this box to minimize the report.

Report Example



Report Heading	Description	Database Item/ Calculation Table Name
Split/Skill	The name or number of the split/skill selected for this report.	syn(SPLIT) csplit
Calls Waiting	The number of split ACD calls waiting to be answered. This includes calls that are in queue and calls that are ringing at an agent voice terminal. It does not include direct agent calls (Generic 3).	INQUEUE + INRING csplit
Oldest Call Waiting	The number of seconds that the oldest ACD call has waited in queue or ringing before being answered. This does not include direct agent calls.	OLDESTCALL csplit

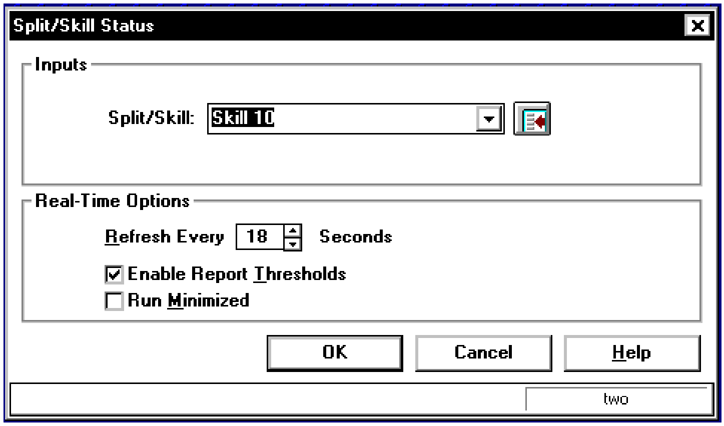
Split/Skill—Graphical Status

This report shows the status of the agent, the amount of time in an agent state, and the split/skill statistics for individual agents.

Things to Know About This Report

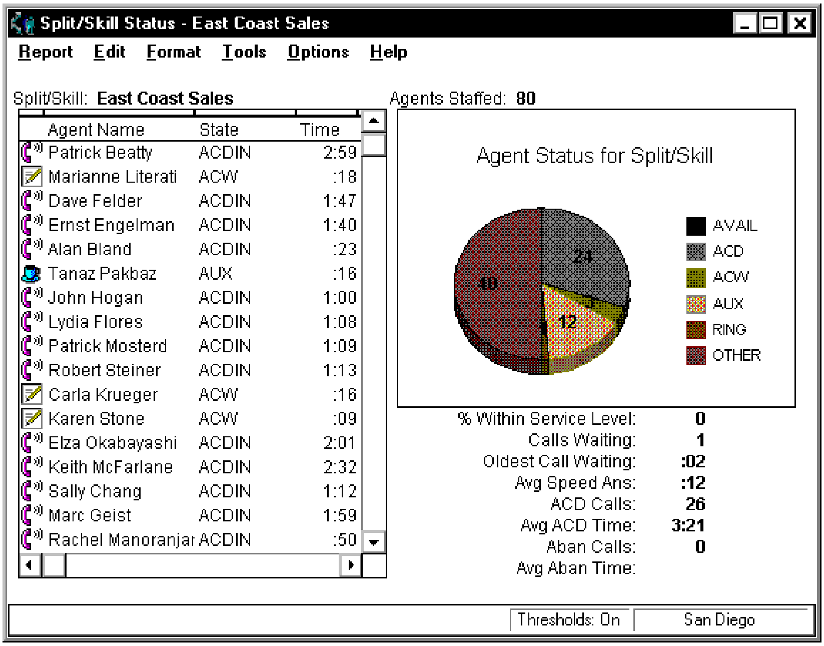
- You can access this report from the Real-Time Split/Skill Category selector menu.
- From this report, you can drill down to the Real-Time or Integrated Agent Information, Work State, and Graphical AUX Agent (for an ECS switch with EAS) reports.
- The appearance of the report can be changed. See the “Formatting Chart Reports” section in Chapter 4, “Reports Basics,” for more information.
- This report is available in both graphical and tabular formats.
- The grid on the left side of the report lists the staffed (logged in) agents in the split/skill you specify, the state (workmode) each agent is currently in, the amount of time the agent has been in the current state, and the split/skill that the agent is in currently. If the Split/Skill column is empty, the agent is not currently on a call. The split/skill selected for the report is displayed above the table.
- By default, agent names are sorted alphabetically. If there are more staffed agents than can be displayed, a scroll bar appears on the right side of the table. To the left of each agent name (or login id, if names are not assigned) is an icon representing the agent’s state.
- The three-dimensional pie chart in the upper-right quadrant shows the number of agents in each agent state (Avail, ACD, AUX, ACW, Ring, Other) for the selected split/skill. The number of agents in each agent state is displayed on the corresponding piece of pie. A legend is displayed to the right of the chart.
- The fields in the lower-right quadrant of the report display real-time split/skill information.

Input Window



Item	Description
Split/Skill:	Enter the appropriate split/skill name(s). Any name you want to appear on the report must have been previously defined and entered in the Dictionary subsystem.
Refresh Every <#> Seconds	Enter the number of seconds (3 to 600) to specify how rapidly *CentreVu* CMS should update the report data. The default for the Refresh rate in seconds: field in this window is your assigned minimum refresh rate plus 15 seconds. To find out what your minimum refresh rate is, or to change it, check with your *CentreVu* CMS administrator.
Enable Report Thresholds	Check this box to turn on the thresholds for the report. For more information, see the “Setting Report threshold Highlights” section in Chapter 5, “Reports.”
Run Minimized	Check this box to minimize the report.

Report Example



Report Heading	Description	Database Item/ Calculation Table Name
Split/Skill:	The split/skill for which the agent is in the current work mode.	syn(SPLIT) csplit
Agents Staffed:	The current number of positions that are staffed.	STAFFED csplit
Agent Name	The names (or agent IDs if the names have not been assigned in Dictionary) of the agents assigned to this split/skill and logged in.	syn(LOGID) cagent
State	The current work mode (state) the agent is in (AVAIL, ACD, ACW, AUX, DACD, DACW, RING, UNKNOWN, OTHER, UNSTAFF) and the call direction (blank, IN, or OUT).	syn(AWORKMODE) and syn(DIRECTION) cagent

Report Heading	Description	Database Item/ Calculation Table Name
Time	The amount of time that the agent has been in the current work mode (AVAIL, ACD, etc.) and the call direction. Time is zeroed whenever the work mode or call direction changes. That is, if the agent goes from ACD-IN to AVAIL, time starts over.	AGTIME cagent
Split/Skill	The split/skill the agent is currently working in. The skill is active when the agent is: • On a split/skill, on a direct agent ACD call, or in ACW — this is the split/skill associated with the call or ACW. • Available, in AUX or in OTHER states, this is null (blank). • On an AUXIN/AUXOUT call — this is the OLDEST_LOGON split/skill. • On an AUXIN/AUXOUT call from the available state, while in AUX or with an AUXIN/AUXOUT call from the available state, while in AUX or with an AUXIN/AUXOUT call on hold — this is the OLDEST_LOGON split/skill. • On an AUXIN call with an ACD call on hold — this is the OLDEST_LOGON split/skill. • On an AUXOUT call with an ACD call on hold — this is the split/skill associated with the ACD call.	WORKSKILL cagent

Report Heading	Description	Database Item/ Calculation Table Name
Split/Skill (continued)	WORKSKILL differs from WORKSPLIT only in the case that the agent is available. In this case, WORKSKILL will be blank and WORKSPLIT will contain one of the splits/skills in which the agent is available.	WORKSKILL cagent
AVAIL	The number of positions that are currently available in this split/skill.	AVAILABLE csplit
ACD	The current number of positions that are on inbound and outbound ACD calls to this split/skill.	ONACD csplit
ACW	The current number of positions that are in after call work for this split/skill. This includes agents on ACW-IN/ACW-OUT calls as well as agents in ACW not associated with an ACD call. It does not include agents in ACW for direct agent ACD calls.	INACW csplit
AUX	The current number of positions that are in auxiliary work for all splits/skills or on AUX-IN/AUXOUT calls.	INAUX csplit
RING	The current number of positions that are in the “ring” state for this split/skill.	AGINRING csplit
OTHER	The current number of positions that are doing other work.	OTHER csplit

Report Heading	Description	Database Item/ Calculation Table Name
% Within Service Level:	The percentage of split/skill ACD calls answered by an agent within the predefined acceptable service level. Calls to the split/skill include calls that were abandoned and calls that were not answered, but do not include direct agent calls. Calls that were not answered may include forced busy calls, forced disconnect calls, calls redirected to another destination, and calls queued to more than one split/skill and answered in another split/skill.	100*(ACCEPTABLE/ CALLSOFFERED) <PERCENT_SERV_ LVL_SPL> csplit
Calls Waiting:	The number of split/skill ACD calls waiting to be answered. This includes calls that are in queue and ringing at an agent voice terminal and outbound ACD calls placed by an adjunct (outbound predictive dialing - Generic 2.2 switches with ASAI Gateway Interface feature or Generic 3 switches with the ASAI feature only). It does not include direct agent calls (Generic 3 switches only).	INQUEUE+INRING csplit
Oldest Call Waiting:	The number of seconds the oldest ACD call has waited in queue or ringing before being answered. This does not include direct agent calls.	OLDESTCALL csplit
Avg Speed Ans:	The average time calls waited in queue or ringing before an agent answered. This does not include direct agent calls, but it does include outbound ACD calls placed by an adjunct (outbound predictive dialing - Generic 2.2 switches with ASAI Gateway Interface feature or Generic 3 with the ASAI feature only).	ANSTIME / ACDCALLS <AVG_ANSWER_ SPEED> csplit

Report Heading	Description	Database Item/ Calculation Table Name
ACD Calls:	The queued ACD calls to the split/skill that were answered by an agent. This does not include direct agent calls, but it does include ACD calls placed by an adjunct (outbound predictive dialing - Generic 2.2 switches with ASAI Gateway or Generic 3 with ASAI only).	ACDCALLS csplit, hsplit
Avg ACD Time:	The average talk time (does not include hold time) for all ACD calls to this split/skill. This does not include direct agent calls, but it does include talk time of all ACD calls placed by an adjunct (outbound predictive dialing - Generic 2.2 switches with ASAI Gateway Interface feature or Generic 3 with the ASAI feature only).	ACDTIME / ACDCALLS <AVG_ACD_TALK_ TIME> csplit
Aban Calls:	The number of queued calls for each split/skill that abandoned before an agent answered. This includes calls that are ringing at a voice terminal but does not include direct agent calls. It also includes the number of outbound calls for each split/skill that abandoned at the far end before an agent answered (Generic 2.2 switches with ASAI Gateway Interface feature or Generic 3 with the ASAI feature only).	ABNCALLS csplit
Avg Aban Time:	The average time a caller waited before hanging up.	ABNTIME / ABNCALLS <AVG_ABANDON_ TIME> csplit

Split/Skill—Graphical Top Skill Status

This report, available only with EAS, contains a grid of top agents and their work state, a pie chart showing the composite top agent status, and a pie chart showing the composite reason codes for top agents who are in AUX.

Things to Know About This Report

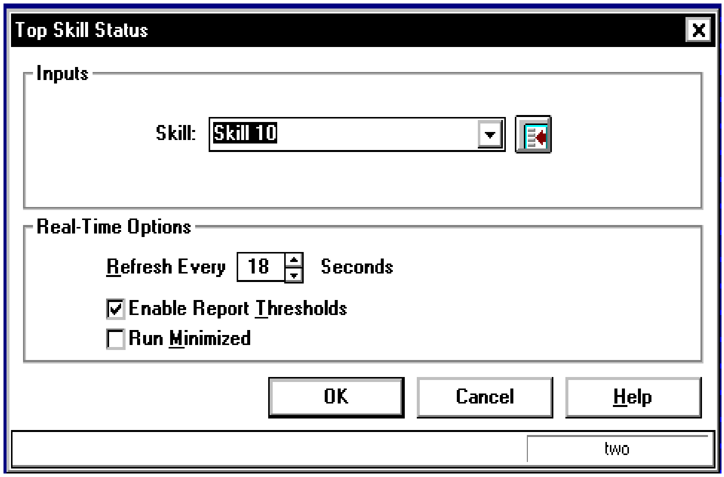
- You can access this report from the Real-Time Split/Skill Category selector menu.
- From this report, you can drill down to the Real-Time and Integrated Agent Information, Top Agents Work State, and Graphical Top AUX Agent reports.
- You can use this report for skill level distribution and to keep agents very busy on ACD calls.
- Even though a skill may be staffed by many agents, it is likely that only those for whom this is their top skill will be available to answer calls to this skill.
- In addition, this report gives you an easy-to-read picture of what is happening with agents who are actually taking calls for this skill. This report is available for Generic 3 switch with EAS.
- The three-dimension pie chart on the top left side of the report contains the following:
  - The composite status of top agents for the skill in each of the work states.
  - A legend in which a different color corresponds to each of the work states (synonyms for reason codes are defined in Dictionary).
- The two-dimension pie chart on the right side of the report contains:
  - The composite status of top agents for the skill who are in AUX for each reason code.

— A legend in which a different color corresponds to each of the reason codes (synonyms for reason codes are defined in Dictionary). The legend is sorted in ascending order by reason code number, with the customer-defined synonym for reason code 0 at the bottom.

Note This pie chart contains data only for the ECS switch with EAS.

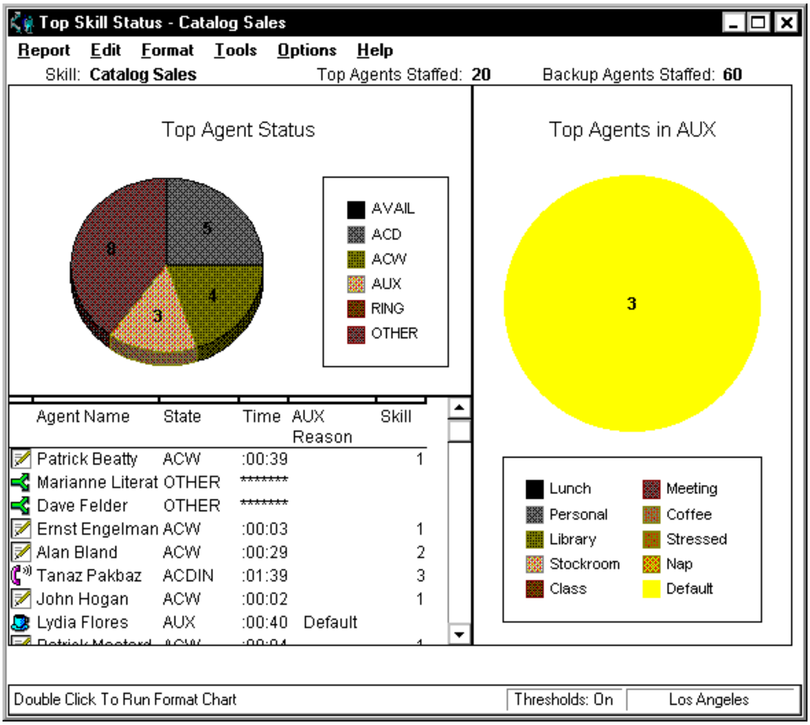
- The grid on the left bottom half of the report contains a row for each staffed agent for whom this skill is their top skill. The row shows an icon representing agent state, the agent names as defined in the Dictionary, the agent state for this skill, time in current state, and a reason code (as defined in the Dictionary) for the AUX work state. The Reason column is blank except for those agents who are in AUX work. This grid also contains the skill in which the agent is active. This field is blank if the agent is in AVAIL, AUX, or OTHER work modes.

Input Window



Item	Description
Skill:	Enter the appropriate split/skill name or number. Any name you want to appear on the report must have been previously defined and entered in the Dictionary subsystem.
Refresh Every <#> Seconds	Enter the number of seconds (3 to 600) to specify how rapidly *CentreVu* CMS should update the report data. The default for the Refresh rate in seconds: field in this window is your assigned minimum refresh rate plus 15 seconds. To find out what your minimum refresh rate is, or to change it, check with your *CentreVu* CMS administrator.
Enable Report Thresholds	Check this box to turn on the thresholds for the report. For more information, see the “Setting Report threshold Highlights” section in Chapter 5, “Reports.”
Run Minimized	Check this box to minimize the report.

Report Example



Report Heading	Description	Database Item/ Calculation, Table Name
Skill:	The name or number of the skill (up to 20 characters) that is selected for this report.	syn(SPLIT) csplit
Top Agents Staffed:	The number of staffed agents for whom this skill is their top skill.	TSTAFFED csplit
Backup Agents Staffed:	The total number of backup (non-top) agents that are staffed for these skills.	STAFFED-TSTAFFED csplit
AVAIL	The total number of top agents logged into the skill who are available in the skill.	TAVAILABLE csplit

Report Heading	Description	Database Item/ Calculation, Table Name
ACD	The total number of top agents connected to inbound and outbound ACD calls in each skill. This does not include direct agent calls.	TONACD csplit
ACW	The number of top agents who are in the after call work state for each skill. This includes agents on ACW-IN or ACW-OUT calls and agents in ACW not associated with an ACD call.	TINACW csplit
AUX	The total number of top agents logged into the skill who are in the AUX Work mode for all skills or are on AUXIN / AUXOUT calls.	TINAUX csplit
RING	The number of top agents with ACD calls (including direct agent calls) ringing.	TAGINRING csplit

Report Heading	Description	Database Item/ Calculation, Table Name
OTHER	The current number of top agent positions that are doing other work. For the Generic 3 switch, the agent did one of the following activities while in the Auto-in or Manual-In state: • The agent put any call on hold and performed no further action. • The agent is on a direct agent call or in ACW for a direct agent call. • The agent is dialing to place a call or to activate a feature. • The agent has a personal call ringing with no other activity. For the Generic 3 and the Generic 1 switches without EAS, agents are logged into multiple splits and doing work for a split other than this one (on an ACD call or in call-related ACW). For the Generic 3 and the Generic 2.2 switches with EAS, agents are logged into multiple skills and doing work for a skill other than this one (on an ACD call or in call-related ACW). Agent positions show up as OTHER directly after the link to the switch comes up and directly after the agents log in before the *CentreVu* CMS is notified of the agent's work state.	TOTHER csplit
Agent Name	The names (or agent IDs if the names have not been assigned in Dictionary) of the top agents assigned to this skill and logged in.	syn(LOGID) cagent
State	The current work mode (state) the agent is in (AVAIL, ACD, ACW, AUX, DACD, DACW, RING, UNKNOWN, OTHER, UNSTAFF) and the call direction (blank, IN, or OUT).	syn(AWORKMODE) and syn(DIRECTION) cagent

Report Heading	Description	Database Item/ Calculation, Table Name
Time	The length of time the agent has been in the current work mode (AVAIL, ACD, and so on), and the call direction.	AGTIME cagent
AUX Reason	The reason associated with the auxiliary work state (on a break, in a meeting, and so on) of this agent. This field is blank if the agent is not in the AUX state.	syn(AUXREASON) cagent
Skill	When an agent is on a split/skill call, a direct agent call, or in the After Call Work (ACW) mode, this is the split/skill associated with the call or the ACW. WORKSKILL is the OLDEST_LOGON: • When an agent is on an AUXIN/AUXOUT call from the available state, while in AUX or with an AUXIN/AUXOUT call on hold • When an agent is on an AUXIN call with an ACD call on hold. When an agent is on an AUXOUT call with an ACD call on hold, this is the split/skill associated with the ACD call. When an agent is available, in AUX, or in OTHER, this is blank.	WORKSKILL cagent
Reason Code 0	The number of top agents logged into the skill who are in AUX work for reason code 0 for all splits or on AUXIN/AUXOUT calls for AUX with reason code 0.	TINAUX0 csplit
Reason Code 1...9	The number of top agents logged into the skill who are in AUX work for each of the reason codes 1-9. This includes agents on AUXIN/AUXOUT calls from AUX with the appropriate reason code.	TINAUX1-9 csplit

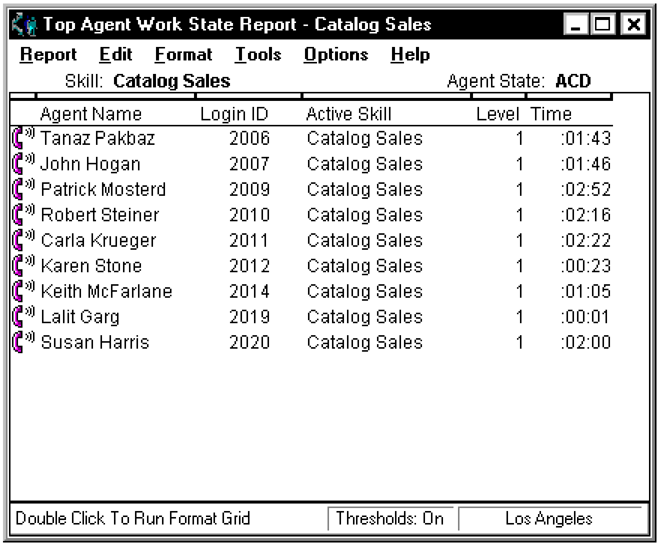
Split/Skill—Top Agent Work State

This report shows top agents who are in the specified work state and the time in the state. In addition, this report shows all of the agents that are staffed even if they are not in a particular state for the specified split/skill.

Things to Know About This Report

- You can access this report only by drilling down from work states (AVAIL, ACD, ACW, RING, and OTHER) on other Real-Time Top Agent reports (for example, from the Real-Time Graphical Top Skill Status report) except for the AUX work state which requires ECS with EAS.
- Because this report is only accessible by drilling down, there is no input window for the report.
- When you drill down to this report from another report, this report shows all of the top agents in that particular work state for that split or skill only.
- From this report, you can drill down to Real-Time or Integrated Agent Information reports.
- This report is available on all ECS or later switch releases with EAS.
- Call center supervisors can use this report to look at all the top agents in a particular work state, to see how long an agent has been in this work state, the skill for which they are occupied, and to see the skill level assigned to the agent for this skill.
- This report contains the following:
  - — A grid with a row for each top agent currently in the selected work state.
  - — Top agent name, login ID, time in state, split/skill, and the skill level for the skill in which the agent is active in each row of the grid.
  - — Ability of the user to specify sort by agent name, login ID, time in state, split/skill, and skill level.
  - — Ability of the user to specify a primary and a secondary sort key.
  - — A grid, by default, that is sorted by split/skill for the primary sort, then by time in state (in descending order) for the secondary sort.

Report Example



Report Heading	Description	Database Item/ Calculation, Table Name
Skill:	The name or number of the skill selected for the report.	syn(SPLIT)
Agent State:	The current work mode for this agent. Values include AVAIL, ACD, ACW, AUX, DACD, DACW, RING, UNKNOWN, OTHER, and UNSTAFF.	(syn)WORKMODE cagent
Agent Name:	The names (or agent IDs if the names have not been assigned in Dictionary) of the top agents assigned to this skill and logged in.	syn(LOGID) cagent
Login ID	The login identification of the agent.	LOGID cagent

Report Heading	Description	Database Item/ Calculation, Table Name
Active Skill	The split is active when the agent is: • On a skill, on a direct agent ACD call, or in ACW—this is the skill associated with the call or ACW. • Available, in AUX or in OTHER states, this is null (blank). • On an AUXIN / AUXOUT call—this is the OLDEST_LOGON skill. • On an AUXIN / AUXOUT call from the available state, while in AUX or with an AUXIN / AUXOUT call from the available state, while in AUX or with an AUXIN / AUXOUT call on hold—this is the OLDEST_LOGON skill. • On an AUXIN call with an ACD call on hold—this is the OLDEST_LOGON skill. • On an AUXOUT call with an ACD call on hold—this is the split / skill associated with the ACD call. WORKSKILL differs from WORKSPLIT only in the case that the agent is available. In this case, WORKSKILL will be blank and WORKSPLIT will contain one of the skills in which the agent is available.	syn(WORKSKILL) cagent

Report Heading	Description	Database Item/ Calculation, Table Name
Level	When an agent is on a skill call, a direct agent call, or in ACW mode, this is the skill associated with the call or the ACW, and the level associated with the skill. WORKSKILL is the OLDEST_LOGON: • When an agent is on an AUXIN / AUX-OUT call from the available state, while in AUX or with an AUXIN / AUXOUT call on hold • When an agent is on an AUXIN call with an ACD call on hold. When an agent is on an AUXOUT call with an ACD call on hold, this is the skill associated with the ACD call. When an agent is available, in AUX, or in OTHER, this is blank. WORKSKLEVEL is the skill level (ranging from 1 to 16 for ECS switches, or 1-2 for earlier switch releases) associated with WORKSKILL.	WORKSKLEVEL cagent
Time	The amount of time the agent has been in the current work mode (AVAIL, ACD, etc.) and the call direction. Time is zeroed whenever the work mode or call direction changes. That is, if the agent goes from ACD-IN to AVAIL, time starts over.	AGTIME cagent

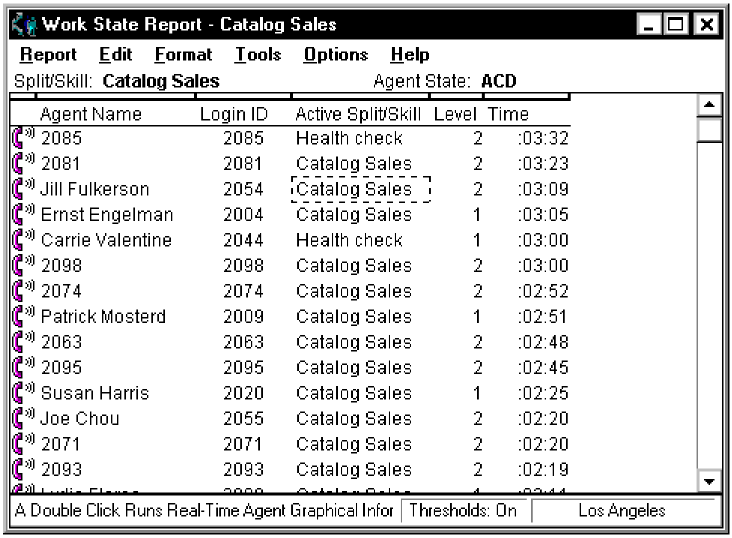
Split/Skill—Work State

This report shows all of the agents who are in a specified work state and the time in that state.

Things to Know About This Report

- You can access this report only by drilling down from work states (AVAIL, ACD, ACW, AUX, RING, and OTHER) on other Real-Time reports (for example, from the Real-Time Graphical Status report).
- Because this report is only accessible by drilling down, there is no input window for the report.
- When you drill down to this report from another report, this report shows all of the agents in that work state for that split or skill only.
- From this report, you can drill down to Real-Time or Integrated Agent Information reports.
- This report is available on all switches.
- Call center supervisors can use this report to look at all agents in a particular work state, and to see how long an agent has been in this work state, the split/skill for which they are occupied, and to see the skill level assigned to the agent for this skill.
- This report contains the following:
  - A grid with a row for each top agent currently in the selected work state.
  - Agent name, login ID, time in state, split/skill, and the skill level for the skill in which the agent is active in each row of the grid.
  - Ability of the user to specify sort by agent name, login ID, time in state, split/skill, and skill level.
  - Ability of the user to specify a primary and a secondary sort key.
  - A grid, by default, that sorts by split/skill for the primary sort, then by time in state (in descending order) for the secondary sort.

Report Example



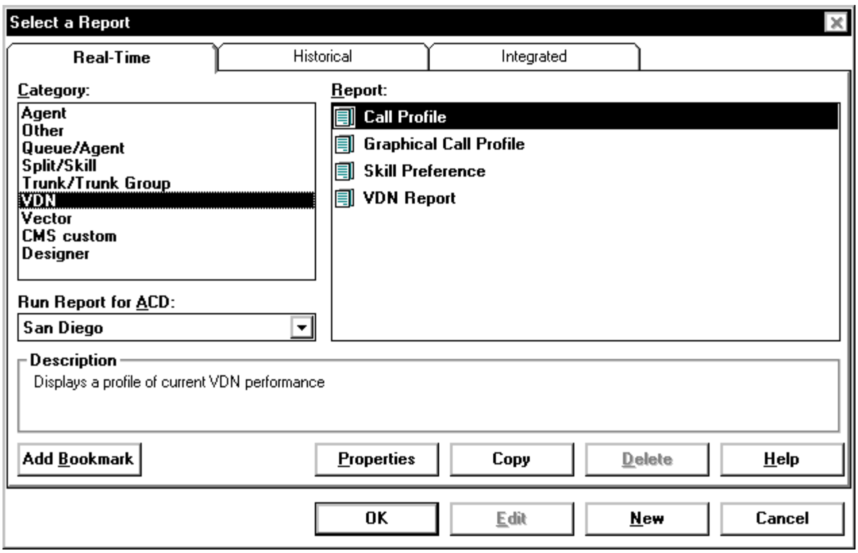
Item	Description	Database Item/ Calculation, Table Name
Split/Skill:	The name or number of the split/skill selected for the report.	syn(SPLIT) csplit
Agent State:	The current work mode (state) that the agent is in (AVAIL, ACD, ACW, AUX, DACD, DACW, RING, UNKNOWN, OTHER, UNSTAFF) and the call direction (blank, IN or OUT).	AWORKMODE and DIRECTION cagent
Agent Name	The names (or agent IDs if the names have not been assigned in Dictionary) of the agents assigned to this split/skill and logged in	syn(LOGID) cagent
Login ID	The login identification of the agent.	LOGID cagent

Item	Description	Database Item/ Calculation, Table Name
Active Split/Skill	The split is active when the agent is: • On a split/skill, on a direct agent ACD call, or in ACW—this is the split/skill associated with the call or ACW. • Available, in AUX or in OTHER states, this is null (blank). • On an AUXIN/AUXOUT call—this is the OLDEST_LOGON split/skill. • On an AUXIN/AUXOUT call from the available state, while in AUX or with an AUXIN/AUXOUT call from the available state, while in AUX or with an AUXIN/AUXOUT call on hold—this is the OLDEST_LOGON split/skill. • On an AUXIN call with an ACD call on hold—this is the OLDEST_LOGON split/skill. • On an AUXOUT call with an ACD call on hold—this is the split/skill associated with the ACD call. WORKSKILL differs from WORKSPLIT only in the case that the agent is available. In this case, WORKSKILL will be blank and WORKSPLIT will contain one of the splits/skills in which the agent is available.	syn(WORKSKILL) cagent

Item	Description	Database Item/ Calculation, Table Name
Level	When an agent is on a skill call, a direct agent call, or in ACW mode, this is the skill associated with the call or the ACW, and the level associated with the skill. WORKSKILL is the OLDEST_LOGON: • When an agent is on an AUXIN / AUX-OUT call from the available state, while in AUX or with an AUXIN / AUXOUT call on hold • When an agent is on an AUXIN call with an ACD call on hold. When an agent is on an AUXOUT call with an ACD call on hold, this is the skill associated with the ACD call. When an agent is available, in AUX, or in OTHER, this is blank. WORKSKLEVEL is the skill level (ranging from 1 to 16) associated with WORKSKILL.	WORKSKLEVEL
Time	The amount of time that the agent has been in the current work mode (AVAIL, ACD, etc.) and the call direction. Time is zeroed whenever the work mode or call direction changes. That is, if the agent goes from ACD-IN to AVAIL, time starts over.	AGTIME

Real-Time VDN Category Tab

The following is an example of the reports that may be available in the VDN Category from the Real-Time Report tab depending on your switch type and whether you have purchased the EAS or Vectoring feature.



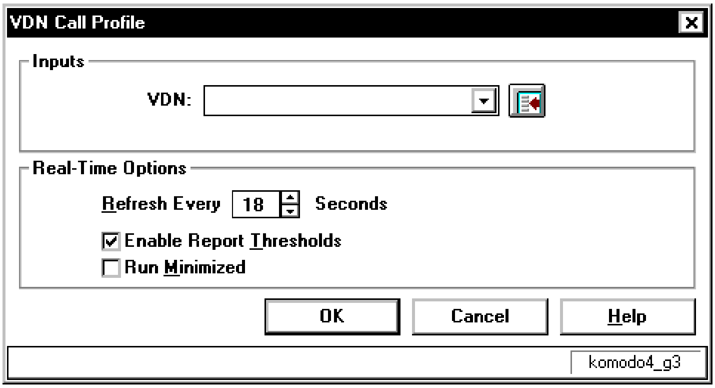
VDN—Graphical Call Profile

This report shows how calls to the VDN that you specify are being handled compared to your call center’s predefined acceptable service level. By default, the report appears as shown in this section. However, the chart type can be changed.

Things to Know About This Report

- You can access this report from the Real-Time VDN Category selector menu.
- This report is available on switches with the Call Vectoring feature.
- See the “Formatting Chart Reports” section in Chapter 4, “Reports Basics,” for more information.
- Call center supervisors can use this report to look at VDN calls answered within the acceptable service level and service interval answer and abandons.
- This report contains two charts, with a legend to the right of each:
  - — The top chart, a three-dimensional pie chart, shows the percentage of ACD calls answered within the predefined acceptable service level and the percentage of ACD calls answered outside this level.
  - — The bottom chart, an area graph, shows the number of ACD calls answered and abandoned within each service interval. The horizontal axis represents each of the defined service intervals in seconds, and the vertical axis represents the number of ACD calls answered / abandoned within each of the defined service levels. The number displayed for each service interval is the upper limit of the interval. For example, if the first two intervals are “5” and “10,” the first data point on the graph shows the number of calls answered / abandoned within 0-5 seconds, and the second data point shows the number of calls answered / abandoned within 6-10 seconds.
  - — The VDN selected for the report and the predefined acceptable service level are displayed above the top chart.

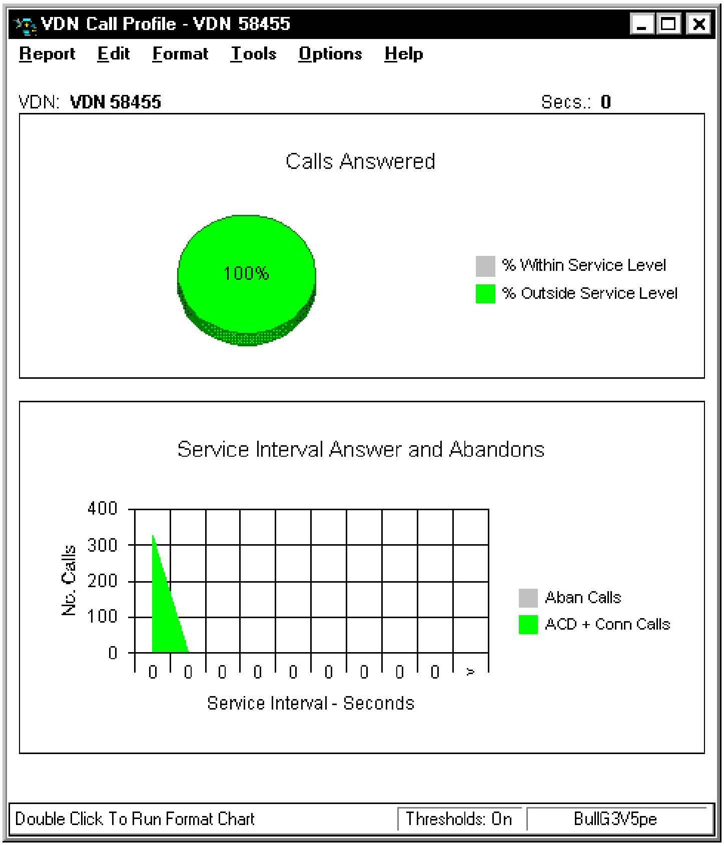
Input Window



Item	Description
VDN:	Enter the name or number of the VDN that you want included in the report. You can enter a name only if it has been previously defined in the Dictionary subsystem. To complete the input field, do the following: • Type in the information requested. • Select the information from the pull-down list of previously used items. During each CMS session, Supervisor recalls the items you have selected for each input field. You can use the pull-down list to select an item for the input field. • Use the Browse button to view all available items for the input field, and then select an item(s) for the input field. When you click on the Browse button, a window opens that lets you select items for the input field.

Item	Description
Refresh Every <#> Seconds	Enter the number of seconds (3 to 600) to specify how rapidly CentreVu CMS should update the report data. The default for the Refresh rate in seconds: field in this window is your assigned minimum refresh rate plus 15 seconds. To find out what your minimum refresh rate is, or to change it, check with your *CentreVu* CMS administrator.
Enable Report Thresholds	Check this box to turn on the thresholds for the report. For more information, see the “Setting Report Threshold Highlights” section in Chapter 5, “Reports.”
Run Minimized	Check this box to minimize the report.

Report Example



Item	Description	Database Item/ Calculation Table Name
VDN:	The number or name of the VDN for which the report shows data (selected in the report input window).	VDN or syn(VDN) cvdn
Secs.:	The current setting for the acceptable service level.	SERVICELEVEL cvdn

Item	Description	Database Item/ Calculation Table Name
% Within Service Level	Percentage of calls to the VDN that were answered / connected within the service level (specified in the VDN Call Profile Setup window). For Generic 3 switches, Percent Within Service Level does not include direct agent calls.	<PERCENT_SERV_LVL_VDN> cvdn
% Outside Service Level	The percentage of VDN calls that were not answered by an agent within the predefined acceptable service level. Calls that were not answered may include forced busy calls, forced disconnect calls, calls redirected to another destination, and calls queued to more than one VDN and answered in another VDN.	<100-PERCENT_ SERV_LVL_VDN> cvdn
Service Interval - Seconds	The lower and upper limit in seconds of each service level increment (as defined in the VDN Call Profile Setup window). These increments represent progressively longer wait time segments in which calls may be answered, connected, or abandoned.	PERIOD1-9 cvdn
ACD + Conn Calls	The number of calls to the VDN that were answered by an agent or connected to a non-ACD destination within each of the service level increments. Calls in each increment are represented by color-coded area (see legend).	ANSCONNCALLS 1 through 10 cvdn
Aban Calls	The number of calls to the VDN that were abandoned within each of the service level increments. Calls in each increment are represented by color-coded area (see chart legend) that change color when an upper or lower threshold is reached. For Generic 2.2 and all Generic 3 switches, this is all VDN calls abandoned. With Generic 2.1 and System 85 switches, this is ACD calls abandoned.	ABNCALLS1-10 cvdn

16

Historical Report Descriptions

Introduction

The sections in this chapter are as follows:

- About Historical Reports
- Agent—Graphical Time Spent
- Split / Skill—Graphical ASA
- Split / Skill—Graphical Call Profile
- Split / Skill—Graphical Service Level
- Split / Skill—Graphical Skill Time Spent
- VDN—Graphical Call Profile
- VDN—Graphical Service Level.

About Historical Reports

There are a series of Historical Supervisor reports that are available only when you are using the Supervisor application (they are not available through Terminal or standard CMS).

Only reports that are available exclusively through Supervisor are described in this chapter. For descriptions of CMS reports that are not described in this chapter, see the *CentreVu™ CMS Real-Time and Historical Reports* document (585-215-821).

For general information about Historical reports, see Chapter 4, “Reports Basics,” and Chapter 5, “Reports.”

The Historical reports are identified in the following table:

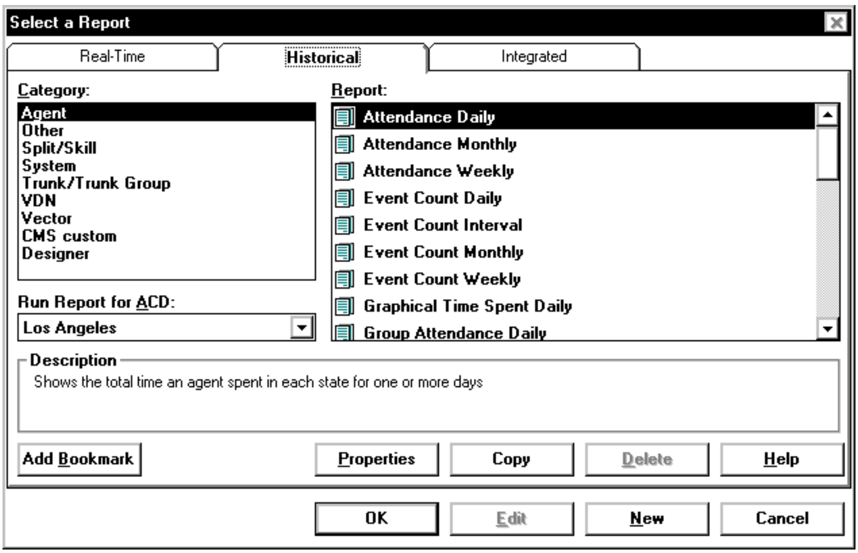
Category	Report Name	Real-Time	Historical	Integrated
Agent	Graphical Information	❑		❑
	Information	❑		❑
Split/Skill	Comparison			❑
	Graphical ASA		❑	
	Graphical AUX Agents	❑		
	Graphical AUX Top Agents	❑		
	Graphical Call Profile	❑	❑	
	Graphical EWT	❑		
	Graphical Queue	❑		
	Graphical Service Level		❑	
	Graphical Skill Time Spent		❑	
	Graphical Split/Skill View			❑
	Graphical Status	❑		
	Graphical Time Spent		❑	
	Graphical Top Skill Status	❑		
	Top Agent Work State	❑		
	Work State Report	❑		

Category	Report Name	Real-Time	Historical	Integrated
VDN	Graphical Call Handling			❑
	Graphical Call Profile	❑	❑	
	Graphical Service Level		❑	

Note "Graphical ...." reports may not be available on the Real-Time Report tab if they are not valid for your switch type or the features you purchased.

Historical Agent Category Tab

The following is an example of the reports that may be available in the Agent Category from the Historical Report tab depending on your switch type and whether you have purchased the EAS or Vectoring feature.



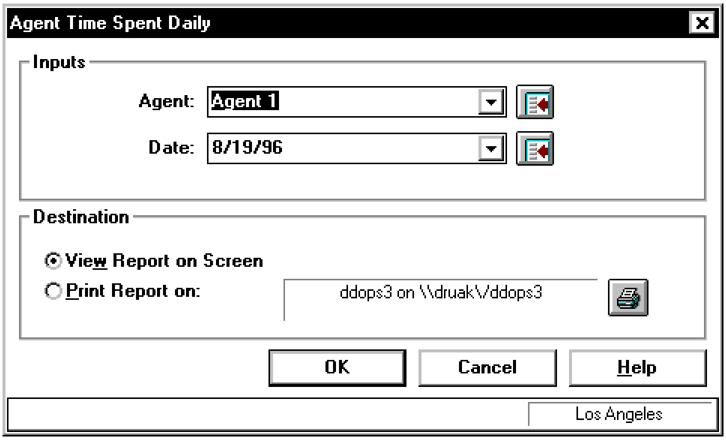
Agent—Graphical Time Spent

This report shows historical information and statistics for the specified agent.

Things to Know About This Report

- You can access this report from the Historical Agent Category selector menu.
- This report is available for all switch releases. The contents of this report depends upon the switch release for which it is being run.
- Call center supervisors can use this report to get an idea of how much time an agent spent on ACD calls, in available state, in ACW, in AUX, etc. for a particular day. This report enables the supervisor to tell how much time the agent spent in AUX work state for each of the reason codes defined for this call center.
- The following example of this report shows the information it will contain for the *DEFINITY* ® Enterprise Communications Server (ECS) Release 5 switch with EAS.

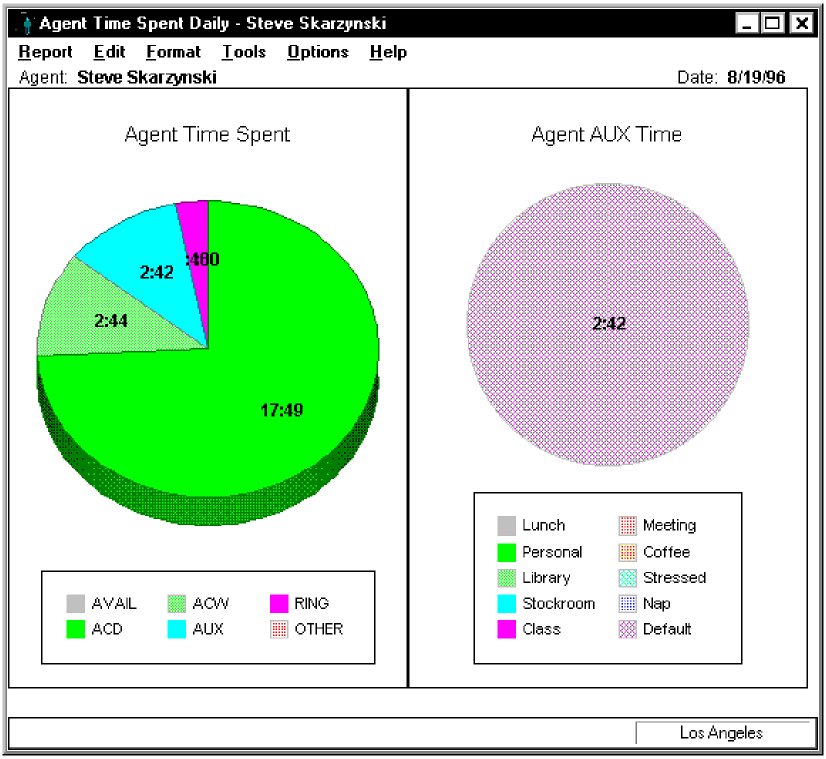
Input Window



Item	Description
Agent:	Enter the name of the agent. The agent's name must be defined in the Dictionary subsystem; otherwise, you will see the agent IDs.

Item	Description
Date:	Enter the date for which the report will be run. To complete the input field, do any of the following steps: • Type in the information requested. You can type in month / date / year format (for example, 8 / 21 / 96), or you can use a "-" offset based on today's date (for example, -1 for yesterday). • Select the information from the pull-down list of previously used items. During each CMS session, Supervisor recalls the items you have selected for each input field. You can use the pull-down list to select an item for the input field. • Use the Browse button to view all available items for the input field, and then select an item(s) for the input field. When you click on the Browse button, a window opens that lets you select items for the input field.
Destination	Choose a report destination. You can select View Report on Screen or Print Report on: and then use the Select Printer button to print the report on any Windows printer. The default printer is shown.

Report Example



Report Heading	Description	Database Item/ Calculation, Table Name
Agent:	The names (or agent login ID if the names have not been assigned in Dictionary) of the agent.	syn(LOGID) cagent
Date:	The day for which the report was run (selected in the report input window).	ROW_DATE
AVAIL	The time during the collection interval that the agent was in the available state for split/skill or direct agent ACD calls in any split/skill.	sum(TI_AVAILTIME) cagent

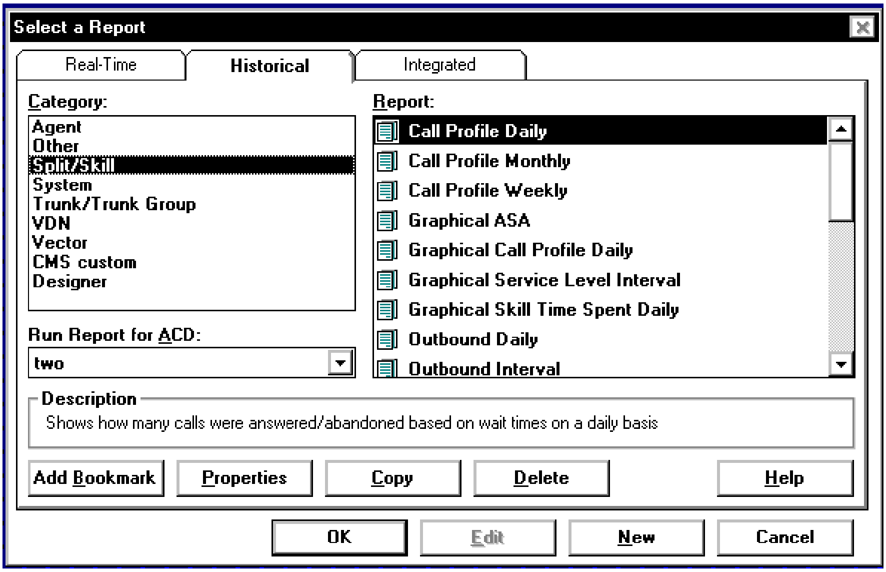
Report Heading	Description	Database Item/ Calculation, Table Name
ACD	The time during the collection interval that the agent was talking on ACD calls for the SPLIT.	sum (<TOTAL_I_ACD TIME>) cagent
ACW	The time during the collection interval that the agent was in after call work (ACW). This includes ACW for split/skill ACD calls and ACW not associated with the call.	sum(<TOTAL_I_ACW TIME> cagent)
AUX	The time during the collection interval that the agent was in the AUX work state in all splits/skills or on AUXINCALLS or AUXOUTCALLS.	sum(TI_AUXTIME) cagent
RING	The time during the collection interval that the agent had split/skill and direct agent ACD calls ringing.	sum(I_RINGTIME) cagent
Reason Code 0	The time that the agent spent in AUX with reason code 0. This is the time in “system” AUX for the switches with AUX reason codes active. It is the same as TI_AUXTIME for switches without AUX reason codes active. The “TI_” stands for the time that is stored only for the split or skill that the agent is logged into for the longest amount of time. “TI_” time needs to be summed across the skills the agents may log into, in case the login order changes during the collection interval.	sum(TI_AUXTIME0) cagent

Chapter 16

Report Heading	Description	Database Item/ Calculation, Table Name
Reason Codes 1-9	The time that the agent spent in AUX with each of the reason codes 1-9. The "TI_" stands for the time that is stored only for the split or skill that the agent is logged into for the longest amount of time. "TI_" time needs to be summed across the skills the agents may log into, in case the login order changes during the collection interval.	sum(TI_AUXTIME1-9) cagent
OTHER	The time during the collection interval that the agent was doing other work in all splits/skills. For Generic 3 switches, while in Auto-in or Man-In: the agent put any call on hold and performed no further action, the agent dialed to place a call or to activate a feature, or an extension call rang with no other activity. For Generic 2.2 switches, the agent pushed the Hold button or flashed the switchhook from Auto-in or Manual-in mode and performed no further action. For all switches, TI_OTHERTIME is collected for the time period after the line to the switch comes up or after the agent logs in and before the CMS receives notification of the agent's state from the switch. The TI_ stands for the time that is stored only for the split/skill that the agent is logged into for the longest amount of time. TI_ time needs to be summed across the splits/skills the agents may log into, in case the logon order changes during the collection interval.	sum(TI_OTHERTIME) cagent

Historical Split/Skill Category Tab

The following is an example of the reports that may be available in the Agent Category from the Historical Report tab depending on your switch type and whether you have purchased the EAS or Vectoring feature.



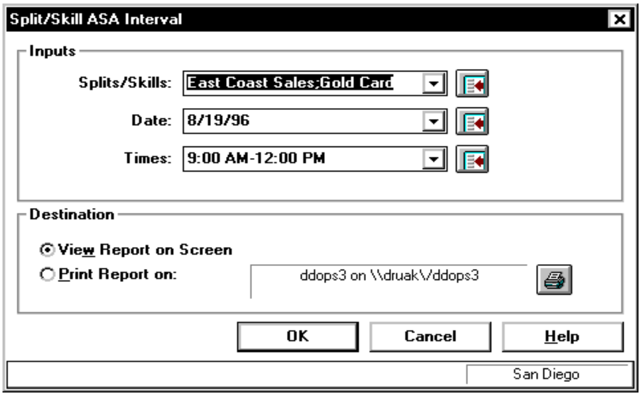
Split/Skill—Graphical ASA

The Historical Graphical ASA (Average Speed of Answer) report shows the average speed of answer for ACD calls answered in each selected split/skill for each selected interval.

Things to Know About This Report

- You can access this report from the Historical Split/Skill Category selector menu.
- The chart type can be changed. See the “Formatting Chart Reports” section in Chapter 4, “Reports Basics,” for more information.

Input Window

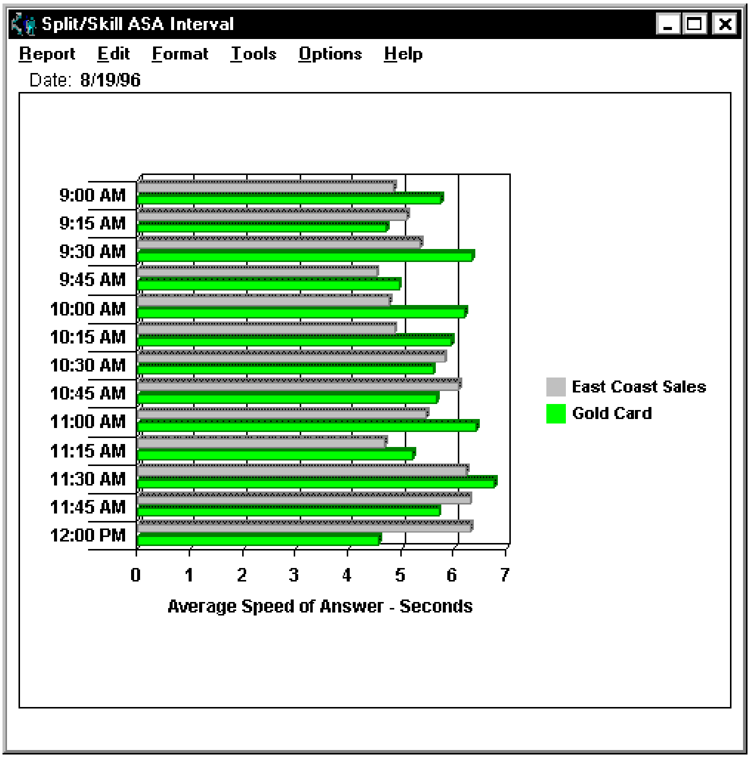


Item	Description
Splits/Skills:	Enter the name(s) or number(s) of the split(s)/skill(s) you want included in the report. You can enter a name only if it has been previously defined in the Dictionary subsystem. To complete the input field, do the following: • Type in the information requested. • Select the information from the pull-down list of previously used items. During each CMS session, Supervisor recalls the items you have selected for each input field. You can use the pull-down list to select an item for the input field. Use the Browse button to view all available items for the input field, and then select (an) item(s) for the input field. When you click on the Browse button, a window opens that lets you select items for the input field.

Item	Description
Date:	Enter the date for which the report will be run. To complete the input field, do the following: • Type in the information requested. You can type in month/date/year format (for example, 8/21/96), or you can use a “-” offset based on today’s date (for example, -1 for yesterday). • Select the information from the pull-down list of previously used items. During each CMS session, Supervisor recalls the items you have selected for each input field. You can use the pull-down list to select an item for the input field. Use the Browse button to view all available items for the input field, and then select an item(s) for the input field. When you click on the Browse button, a window opens that lets you select items for the input field.
Times:	Enter the period of time you would like the report to cover. To complete the input field, do the following: • Type in the information requested. You can type in AM/PM format (for example, 7:30AM-5:00PM), or you can use 24-hour format (for example, 7:30-17:00). • Select the information from the pull-down list of previously used items. During each CMS session, Supervisor recalls the items you have selected for each input field. You can use the pull-down list to select an item for the input field. Use the Browse button to view all available items for the input field, and then select an item(s) for the input field. When you click on the Browse button, a window opens that lets you select items for the input field.

Item	Description
Destination	Choose a report destination. You can select View Report on Screen or Print Report on: and then use the Select Printer button to print the report on any Windows printer. The default printer is shown.

Report Example.



Report Heading	Description	Database Item/ Calculation Table Name
Date:	The day for which the report was run (selected in the report input window).	syn(LOGID) cagent
Start Time (Interval)	The start time of the interval for which the data was collected. (This field displays only for the Interval report.)	STARTTIME hsplit
Split/Skill ASA	The name or number of the split/skill you are currently viewing.	syn(SPLIT) hsplit
Average Speed of Answer - Seconds	The value in seconds of the average speed of answer for the split/skill during the time period covered in the report.	<AVG_ANSWER_ SPEED> hsplit

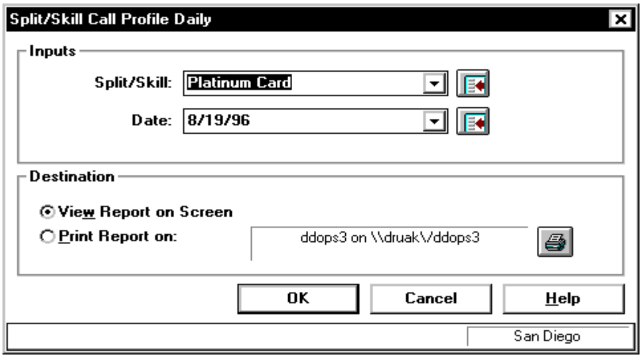
Split/Skill—Graphical Call Profile Daily

This report shows how well the split or skill you specified performed compared to your call center's predefined service levels for the date you specify.

Things to Know About This Report

- You can access this report from the Historical Split/Skill Category selector menu.
- This report has four charts and displays a collection of split/skill call profile related data items at the top of the report. A legend appears to the right of each chart.
- The three-dimensional pie chart in the upper-left quadrant shows the percentage of ACD calls answered within the acceptable service level and the percentage of ACD calls answered outside this level. The numerical value represented by each pie piece is shown inside the pie chart.
- The horizontal bar chart in the lower-left quadrant shows the actual number of ACD calls answered within each service interval. The horizontal axis represents the number of calls answered or abandoned. The vertical axis represents the customer's service intervals. For each of these intervals, two horizontal bars are displayed. One bar shows the number of abandoned calls and the other bar shows the number of answered ACD calls.
- The number displayed for each service interval is the upper limit of the interval. For example, if the first two intervals are "5" and "10," the first data point on the chart indicates the number of calls answered/abandoned within 0-5 seconds, and the second data point indicates the number of calls answered/abandoned within 6-10 seconds.
- The three-dimensional pie charts on the right side of the report show the Percentage Answered Distribution (upper right quadrant) and the Percentage Abandoned Distribution (lower right quadrant) for each service level increment. The numerical value represented by each pie piece is shown inside the pie chart.
- Other chart styles are available and can be changed. See the "Formatting Chart Reports" section in Chapter 4, "Reports Basics," for more information.

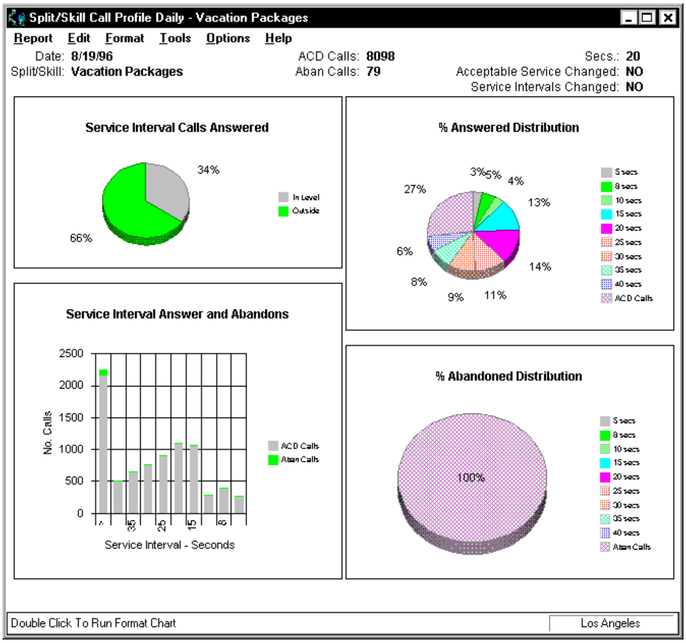
Input Window



Item	Description
Split/Skill:	Enter the name or number of the split/skill you want included in the report. You can enter a name only if it has been previously defined in the Dictionary subsystem. To complete the input field, do the following: • Type in the information requested. • Select the information from the pull-down list of previously used items. During each CMS session, Supervisor recalls the items you have selected for each input field. You can use the pull-down list to select an item for the input field. Use the Browse button to view all available items for the input field, and then select an item for the input field. When you click on the Browse button, a window opens that lets you select items for the input field

Item	Description
Date:	Enter the date for which the report will be run. To complete the input field, do the following: • Type in the information requested. You can type in month/date/year format (for example, 8/21/96), or you can use a "-" offset based on today's date (for example, -1 for yesterday). • Select the information from the pull-down list of previously used items. During each CMS session, Supervisor recalls the items you have selected for each input field. You can use the pull-down list to select an item for the input field. Use the Browse button to view all available items for the input field, and then select an item(s) for the input field. When you click on the Browse button, a window opens that lets you select items for the input field.
Destination	Choose a report destination. You can select View Report on Screen or Print Report on: and then use the Select Printer button to print the report on any Windows printer. The default printer is shown.

Report Example



Report Heading	Description	Database Item/ Calculation Table Name
Date:	The day for which the report was run (selected in the report input window).	ROW_DATE
ACD Calls:	The number of calls answered within the split/skill for that day.	ACDCALLS dsplit
Secs:	The number of seconds defined by the customer as acceptable for answering calls.	SERVICELEVEL dsplit
Split/Skill:	The name or number of the split/skill.	syn(SPLIT) dsplit
Aban Calls:	The number of split/skill calls abandoned for that day.	ABNCALLS dsplit

Report Heading	Description	Database Item/ Calculation Table Name
Acceptable Service Changed:	Shows whether or not the service level was changed. A ”YES” appears if the acceptable service level changed during the period covered by the report. Otherwise, a “NO” appears.	SVCLEVELCHG dsplit
Service Intervals Changed:	A “YES” appears if service intervals were changed during the period covered by the report.	PERIODCHG dsplit
In Level	Percentage of split/skill ACD calls that were answered by an agent within the predefined acceptable service level. Calls to the split/skill include abandoned calls, calls not answered, and outbound ACD calls placed by an adjunct (for example, outbound predictive dialing—Generic 2.2 switches with ASAI Gateway Interface feature or Generic 3 switches with the ASAI feature). Calls that were not answered may include forced busy calls, forced disconnect calls, calls redirected to another destination, and calls queued to more than one split and answered in another split/skill. For Generic 3 switches, Percent Within Service Level does not include direct agent calls.	<PERCENT_ SERV_LVL_SPL> dsplit

Report Heading	Description	Database Item/ Calculation Table Name
Outside	Percentage of split/skill ACD calls that were answered by an agent within the predefined acceptable service level. Calls to the split/skill include abandoned calls, calls not answered, and outbound ACD calls placed by an adjunct. Outbound predictive dialing - Generic 2.2 switches with ASAI Gateway Interface feature or Generic 3 switches with the ASAI feature only. Calls that were not answered may include forced busy calls, forced disconnect calls, calls redirected to another destination, and calls queued to more than one split and answered in another split/skill. For Generic 3 switches, Percent Within Service Level does not include direct agent calls.	<100-PERCENT_SERV_LVL_SPL> dsplit
ACD Calls	Graphically displays the distribution of all of the incoming calls that were answered within each of the defined service levels.	ACDCALLS1-10 dsplit
Aban Calls	Graphically displays the distribution of all of the incoming calls that were abandoned within each of the defined service levels.	ABNCALLS1-10 dsplit

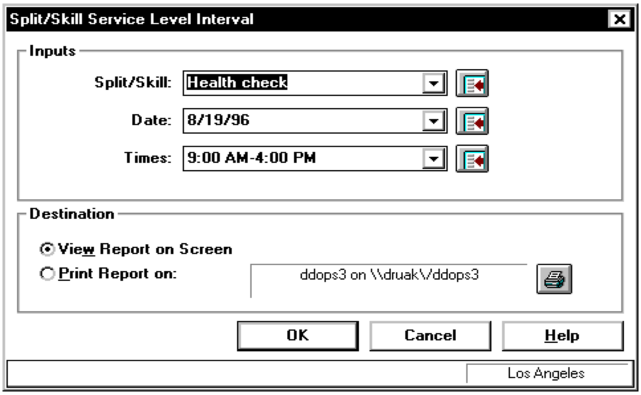
Split/Skill—Graphical Service Level Interval

This report shows the percentage of ACD calls answered within the predefined acceptable service level and the percentage of ACD calls abandoned for the date and split or skill you specify.

Things to Know About This Report

- You can access this report from the Historical Split/Skill Category selector menu.
- The chart type can be changed. See the "Formatting Chart Reports" section in Chapter 4, "Reports Basics," for more information.
- Each set of vertical bars is labeled with the start time for the service interval. The box below the chart is a legend.

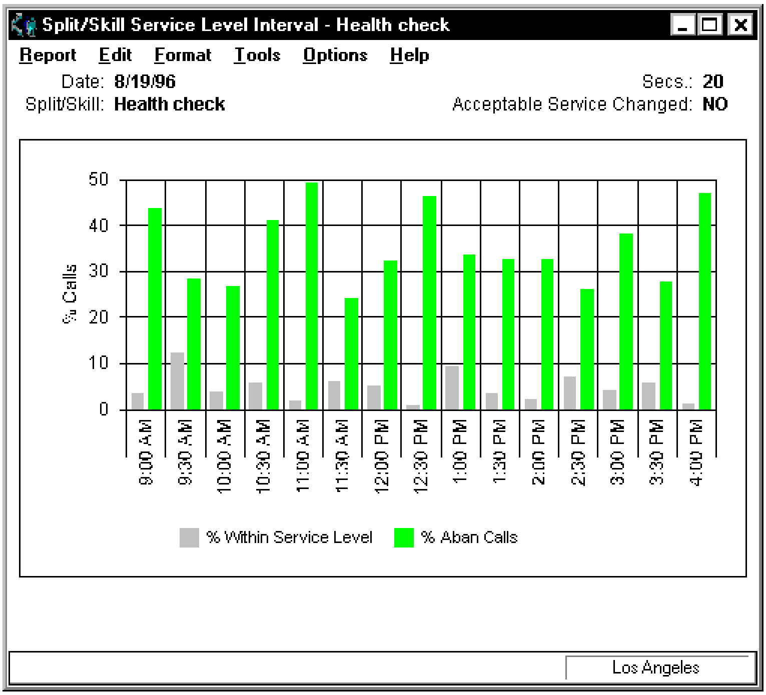
Input Window



Item	Description
Split/Skill:	Enter the name or number of the split/skill you want included in the report. You can enter a name only if it has been previously defined in the Dictionary subsystem. To complete the input field, do the following: • Type in the information requested. • Select the information from the pull-down list of previously used items. During each CMS session, Supervisor recalls the items you have selected for each input field. You can use the pull-down list to select an item for the input field. Use the Browse button to view all available items for the input field, and then select an item for the input field. When you click on the Browse button, a window opens that lets you select items for the input field.

Item	Description
Date:	Enter the date for which the report will be run. To complete the input field, do the following: • Type in the information requested. You can type in month/date/year format (for example, 8/21/96), or you can use a "-" offset based on today's date (for example, -1 for yesterday). • Select the information from the pull-down list of previously used items. During each CMS session, Supervisor recalls the items you have selected for each input field. You can use the pull-down list to select an item for the input field. • Use the Browse button to view all available items for the input field, and then select an item(s) for the input field. When you click on the Browse button, a window opens that lets you select items for the input field.
Times:	Enter the period of time that you would like the report to cover. To complete the input field, do the following: • Type in the information requested. You can type in AM/PM format (for example, 7:30AM-5:00PM), or you can use 24-hour format (for example, 7:30-17:00). • Select the information from the pull-down list of previously used items. During each CMS session, Supervisor recalls the items that you selected for each input field. You can use the pull-down list to select an item for the input field. • Use the Browse button to view all available items for the input field, and then select an item(s) for the input field. When you click on the Browse button, a window opens that lets you select items for the input field.
Destination	Choose a report destination. You can select View Report on Screen or Print Report on: and then use the Select Printer button to print the report on any Windows printer. The default printer is shown.

Report Example



Report Heading	Description	Database Item/ Calculation Table Name
Date:	The day for which the report was run (selected in the report input window).	ROW_DATE
Secs.:	Shows actual administered service level.	SERVICELEVEL hsplit
Split/Skill:	The name or number of the split/skill that you are currently viewing.	syn(SPLIT) hsplit

Report Heading	Description	Database Item/ Calculation Table Name
Acceptable Service Changed:	Shows whether or not the service level was changed. A ”YES” appears if the acceptable service level changed during the period covered by the report. Otherwise, a “NO” appears.	SVCLEVELCHG hsplit
% Within Service Level	Percentage of ACD calls that were answered by an agent within the predefined acceptable service level for the time period shown in the report.	<PERCENT_SERV_LVL_SPL> hsplit
% Aban Calls	Percentage of ACD calls that were abandoned for the time period shown in the report.	<PERCENT_CALL_ABAN> hsplit

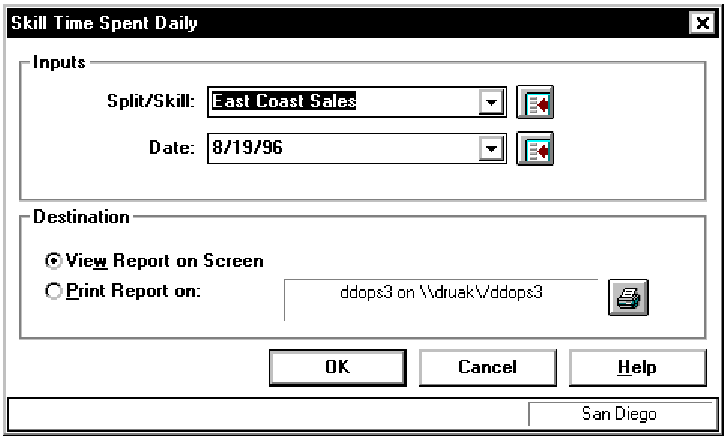
Split/Skill—Graphical Time Spent Daily

This report shows how much time the agents staffed in the specified split or skill spent in each work state. It also shows the composite time spent in the AUX work state for each of the reason codes defined for this call center.

Things to Know About This Report

- Call center supervisors can use this report to estimate how much time agents in this split/skill spent on ACD calls, in available state, in ACW, in AUX, etc. for a particular day. This report enables supervisors to tell how much time the agents in this split/skill spent in AUX work state for each of the reason codes defined for this call center.
- You can access this report from the Historical Split/Skill Category selector menu.
- This report displays a three-dimensional pie chart that shows the percentage of time (in hours and minutes) that the agent spent in each work state.
  - By default, the percentage is shown inside of each section of the pie chart.
  - A legend displays a different color for each of the agent work states (dictionary-defined synonym for each work state).
- This report displays a three-dimensional pie chart that shows the reason codes for the time that the agent spent in AUX work mode. This half of the report contains data available only with ECS switches with EAS.
  - The percentage of AUX time (in hours and minutes) agents spent in AUX for each reason code is displayed inside the slice of the pie chart.
  - A legend to the right of the pie chart shows a different color for each of the reason codes. This legend contains the dictionary-defined reason codes or numbers (if the reason codes have not been defined in Dictionary). See Chapter 5, "Reports," for more information.

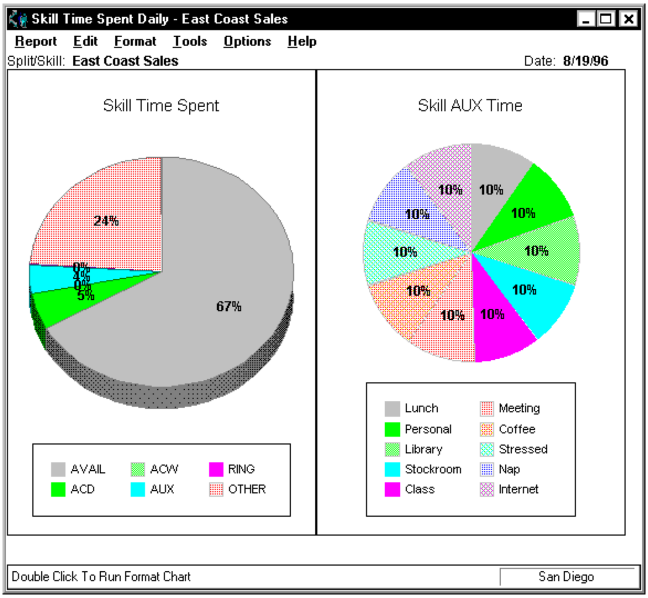
Input Window



Item	Description
Split/Skill:	Enter the name or number of the split/skill that you want included in the report. You can enter a name only if it has been previously defined in the Dictionary subsystem. To complete the input field, do the following: • Type in the information requested. • Select the information from the pull-down list of previously used items. During each CMS session, Supervisor recalls the items you have selected for each input field. You can use the pull-down list to select an item for the input field. Use the Browse button to view all available items for the input field, and then select an item for the input field. When you click on the Browse button, a window opens that lets you select items for the input field.

Item	Description
Date:	Enter the date for which the report will be run. To complete the input field, do the following: • Type in the information requested. You can type in month/date/year format (for example, 8/21/96), or you can use a "-" offset based on today's date (for example, -1 for yesterday). • Select the information from the pull-down list of previously used items. During each CMS session, Supervisor recalls the items you have selected for each input field. You can use the pull-down list to select an item for the input field. • Use the Browse button to view all available items for the input field, and then select an item(s) for the input field. When you click on the Browse button, a window opens that lets you select items for the input field.
Destination	Choose a report destination. You can select View Report on Screen or Print Report on: and then use the Select Printer button to print the report on any Windows printer. The default printer is shown.

Report Example

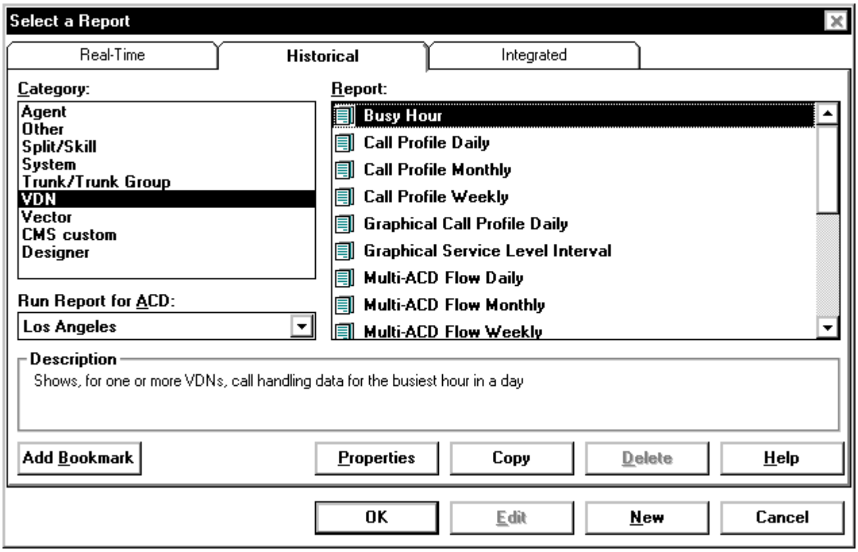


Report Heading	Description	Database Item/ Calculation, Table Name
Split/Skill:	The name or number of the split/skill you are currently viewing.	syn(SPLIT) hsplit
Date:	The day for which the report was run (selected in the report input window).	ROW_DATE
AVAIL	The time during the collection interval that POSITIONS were available for calls from this split/skill.	I_AVAILTIME dsplit
ACW	The time during the collection interval that POSITIONS were in AUX in this split/skill. This includes I_AUXINTIME and I_AUXOUTTIME.	<I_ACWTIME> dsplit

Report Heading	Description	Database Item/ Calculation, Table Name
RING	The time during the collection interval that agents were in the ringing state for calls to this split/skill. If the agent changes work modes or answers/makes another call instead of answering the ringing call, I_RINGTIME will stop accumulating. RINGTIME is the time that the caller spends ringing and is independent of agent activity.	I_RINGTIME dsplit
ACD	The time during the collection interval that POSITIONS were on split/skill ACD calls for this split/skill.	<I_ACDTIME> dsplit
AUX	The time during the collection interval that POSITIONS are in AUX in this split/skill.	I_AUXTIME dsplit
OTHER	The time during the collection interval that POSITIONS were doing other work.	I_OTHERTIME dsplit
Reason Code 0	The time during the collection interval that POSIITONS were in AUX for reason code 0 in this split/skill. This includes time on extension calls from this AUX state. For switches with AUX reason codes active, this represents the time agents spent in “system” AUX. For switches without AUX reason codes active, I_AUXTIME0 is the same as I_AUXTIME.	I_AUXTIME0 dsplit
Reason Code 1-9	The time during the collection interval that POSITIONS were in AUX for each reason code 1-9 in this skill. This includes the time on extension calls from each AUX state.	I_AUXTIME1-9 dsplit

Historical VDN Category Tab

The following is an example of the reports that may be available in the VDN Category on the Historical tab depending on your switch type and whether you have purchased the EAS or Vectoring feature.



VDN—Graphical Call Profile

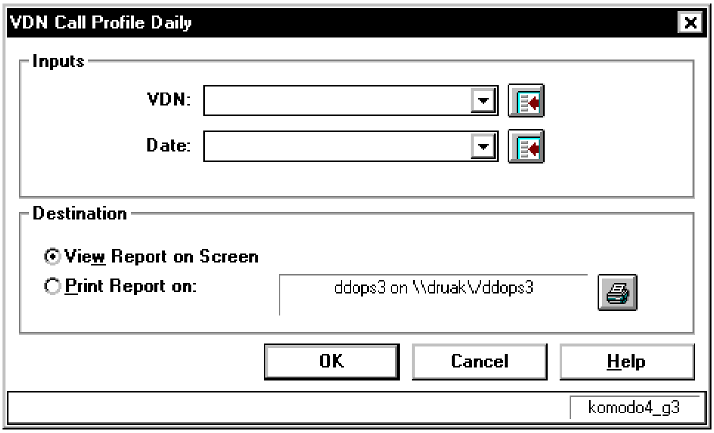
This report shows how calls to the VDN you specify are being handled compared to your call center's predefined acceptable service level for the date you specify. By default, the report appears as shown below. However, the chart type can be changed.

Things to Know About This Report

- You can access this report from VDN Category report list on the Report Selector window's Historical tab.
- This report has four charts and displays a collection of VDN call profile related data items at the top of the report. A legend appears to the right of each chart.
- The three-dimension pie chart in the upper-left quadrant shows the percentage of ACD calls answered within the predefined acceptable service level and the percentage of ACD calls answered outside this level. The numerical value represented by each pie piece is shown inside the pie chart.
- The stacked area graph in the lower-left quadrant shows the number of ACD calls to the VDN which were answered and abandoned within each service interval.
- The number displayed for each service interval is the upper limit of the interval. For example, if the first two intervals are "5" and "10," the first data point on the chart indicates the number of calls answered / abandoned within 0-5 seconds, and the second data point indicates the number of calls answered / abandoned within 6-10 seconds.
- The three-dimension pie charts on the right side of the report show the Percentage Answered Distribution and the Percentage Abandoned Distribution. The numerical value represented by each pie piece is shown inside the pie chart.
- The chart type can be changed. See the "Formatting Chart Reports" section in Chapter 4, "Reports Basics," for more information.

Chapter 16

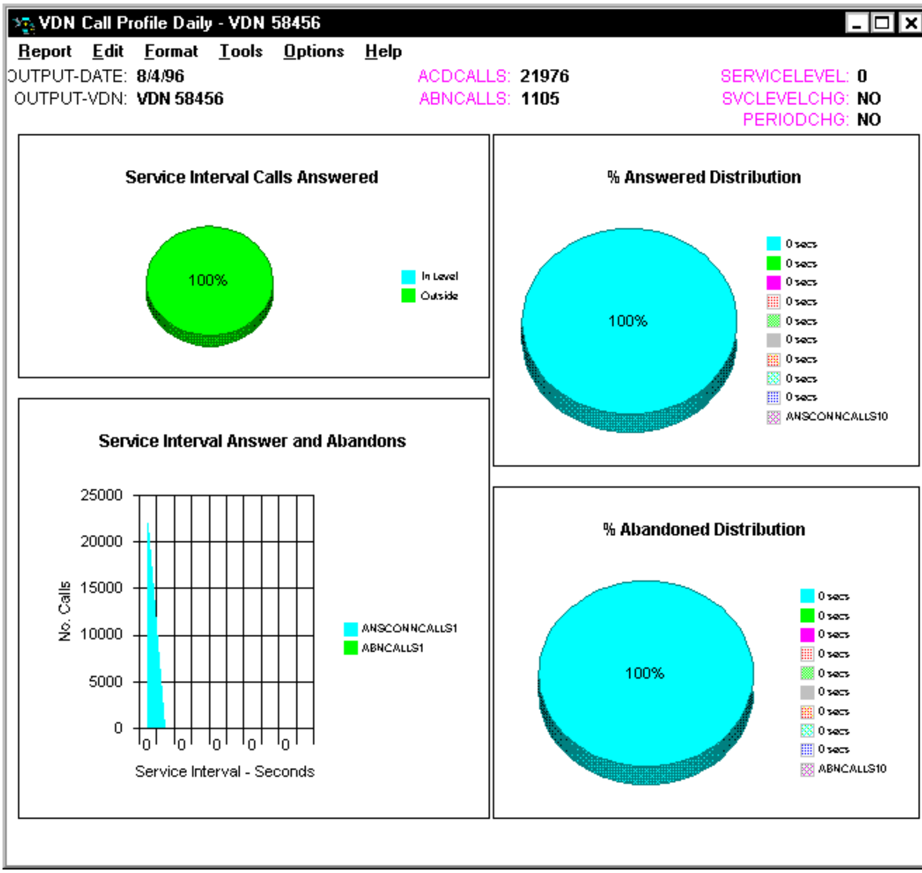
Input Window



Item	Description
VDN:	Enter the name or number of the VDN that you want included in the report. You can enter a name only if it has been previously defined in the Dictionary subsystem. To complete the input field, do the following: • Type in the information requested. • Select the information from the pull-down list of previously used items. During each CMS session, Supervisor recalls the items you have selected for each input field. You can use the pull-down list to select an item for the input field. • Use the Browse button to view all available items for the input field, and then select an item for the input field. When you click on the Browse button, a window opens that lets you select items for the input field.

Item	Description
Date:	Enter the date for which the report will be run. To complete the input field, do the following: • Type in the information requested. You can type in month / date / year format (for example, 8 / 21 / 96), or you can use a “-” offset based on today’s date (for example, -1 for yesterday). • Select the information from the pull-down list of previously used items. During each CMS session, Supervisor recalls the items you have selected for each input field. You can use the pull-down list to select an item for the input field. • Use the Browse button to view all available items for the input field, and then select an item(s) for the input field. When you click on the Browse button, a window opens that lets you select items for the input field.
Destination	Choose a report destination. You can select View Report on Screen or Print Report on: and then use the Select Printer button to print the report on any Windows printer. The default printer is shown.

Report Example



Report Heading	Description	Database Item/ Calculation Table Name
Date:	The day for which the report was run (selected in the report input window).	ROW_DATE
VDN:	The number or name of the VDN for which the report shows data (selected in the report input window).	VDN or syn(VDN) dvdn

Report Heading	Description	Database Item/ Calculation Table Name
ACD Calls:	The total number of calls answered within the split/skill for that day.	ACDCALLS dvdn
Aban Calls:	The total number of split/skill calls abandoned for that day.	ABNCALLS dvdn
Secs.:	Shows administered acceptable service level.	SERVICELEVE L
Acceptable Service Changed	Shows whether or not the service level was changed. A "YES" appears if the acceptable service level changed during the period covered by the report. Otherwise, a "NO" appears.	SVCLEVELCH G dvdn
Service Intervals Changed	A "YES" appears if the service intervals increments changed during the period covered by the report. Otherwise, a "NO" appears.	PERIODCHG dvdn
Service Interval Calls Answered	The number of calls that, while connected to this VDN, were answered by an agent or were connected to a non-ACD destination within each of the service level increments. With Generic 2.2 and Generic 3 switches, *connected* means calls that were answered at a non-ACD destination. With Generic 2.1 and System 85 switches, *connected* means calls that rang at a non-ACD destination.	sum (ANSCONNCA LLS1), sum (ANSCONNCA LLS2 through 10) dvdn
In Level	The percentage of calls to the VDN that were answered/connected within the service level (specified in the VDN Call Profile Setup window). For Generic 3 switches, Percent Within Service Level does not include direct agent calls.	<PERCENT_ SERV_LVL_ VDN> dvdn

Report Heading	Description	Database Item/ Calculation Table Name
Outside	The percentage of VDN calls that were not answered by an agent within the predefined acceptable service level. Calls that were not answered may include forced busy calls, forced disconnect calls, calls redirected to another destination, and calls queued to more than one VDN and answered in another VDN.	<100 - PERCENT_ SERV_LVL_ VDN> dvdn
ACD + Conn Calls	The number of calls to the VDN that were answered by an agent or connected to a non-ACD destination within each of the service level increments. Calls in each increment are represented by color-coded area (see legend).	ANSCONNCALLS1 through 10 dvdn
Aban Calls	The number of calls to the VDN that were abandoned within each of the service level increments. Calls in each increment are represented by color-coded area (see chart legend) that change color when an upper or lower threshold is reached. For Generic 2.2 and all Generic 3 switches, this is all VDN calls abandoned. With Generic 2.1 and System 85 switches, this is ACD calls abandoned.	ABNCALLS1-10 dvdn
Service Interval - seconds	The lower and upper limit in seconds of each service level increment (as defined in the VDN Call Profile Setup window). These increments represent progressively longer wait time segments in which calls may be answered or abandoned.	PERIOD1-9 dvdn
% Answered Distribution	A chart displaying the distribution of the percent of calls answered for the day across all intervals.	None.
% Abandoned Distribution	A chart displaying the distribution of the percent of calls abandoned for the day across all intervals.	None.

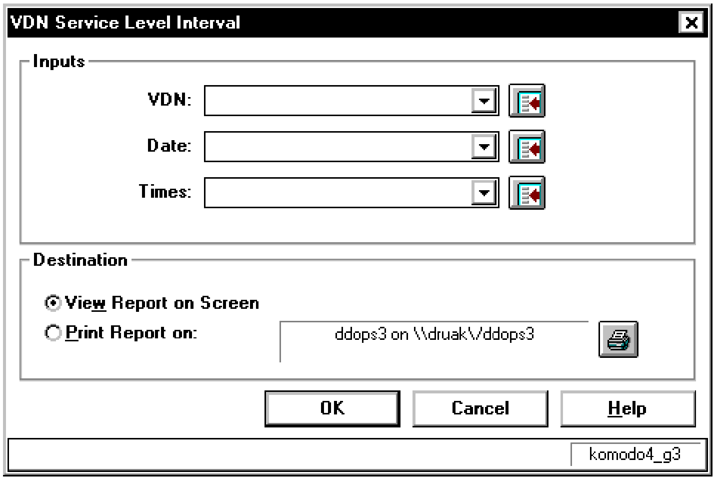
VDN—Graphical Service Level

This report shows the percentage of ACD calls answered within the predefined acceptable service level and the percentage of ACD calls abandoned for the date and VDN that you specify.

Things to Know About This Report

- The chart type can be changed. See the “Formatting Chart Reports” section in Chapter 4, “Reports Basics,” for more information.
- Each set of vertical bars is labeled with the start time for the service interval. The legend appears below the chart.

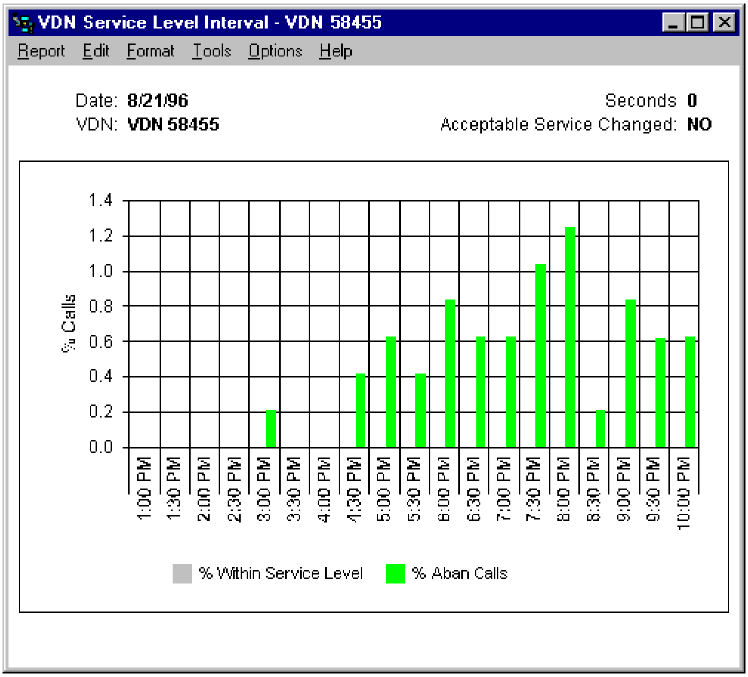
Input Window



Item	Description
VDN:	Enter the name or number of the VDN that you want included in the report. You can enter a name only if it has been previously defined in the Dictionary subsystem. To complete the input field, do the following: • Type in the information requested. • Select the information from the pull-down list of previously used items. During each CMS session, Supervisor recalls the items that you selected for each input field. You can use the pull-down list to select an item for the input field. • Use the Browse button to view all available items for the input field, and then select an item for the input field. When you click on the Browse button, a window opens that lets you select items for the input field.

Item	Description
Date:	Enter the date for which the report will be run. To complete the input field, do the following: • Type in the information requested. You can type in month / date / year format (for example, 8 / 21 / 96), or you can use a "-" offset based on today's date (for example, -1 for yesterday). • Select the information from the pull-down list of previously used items. During each CMS session, Supervisor recalls the items you have selected for each input field. You can use the pull-down list to select an item for the input field. • Use the Browse button to view all available items for the input field, and then select an item(s) for the input field. When you click on the Browse button, a window opens that lets you select items for the input field.
Times:	Enter the period of time you would like the report to cover. To complete the input field, do the following: • Type in the information requested. You can type in AM / PM format (for example, 7:30AM-5:00PM), or you can use 24-hour format (for example, 7:30-17:00). • Select the information from the pull-down list of previously used items. During each CMS session, Supervisor recalls the items you have selected for each input field. You can use the pull-down list to select an item for the input field. • Use the Browse button to view all available items for the input field, and then select an item(s) for the input field. When you click on the Browse button, a window opens that lets you select items for the input field.
Destination	Choose a report destination. You can select View Report on Screen or Print Report on: and then use the Select Printer button to print the report on any Windows printer. The default printer is shown.

Report Example



Report Heading	Description	Database Item/ Calculation Table Name
Date:	The day for which the report was run (selected in the report input window).	ROW_DATE
VDN:	The number or name of the VDN for which the report shows data (selected in the report input window).	VDN hvdn
Seconds	Shows actual administered service level.	SERVICELEVEL

Report Heading	Description	Database Item/ Calculation Table Name
Acceptable Service Changed	Shows whether or not the service level was changed. A ”YES” appears if the acceptable service level changed during the period covered by the report. Otherwise, a “NO” appears.	SVCLEVELCHG hvdn
% Calls	Y-axis. Shows increments of zero to one hundred, representing the possible percentages.	None.
% Within Service Level	The percentage of incoming calls to the VDN that were answered by a measured agent or connected to a non-ACD destination within the service level (as specified in the VDN Call Profile Setup window). Data are for each specified intrahour interval or day (selected in the report input window).	<PERCENT_ SERV_LVL_ VDN> hvdn
% Aban Calls	The percentage of incoming calls that were abandoned in the VDN.	<PERCENT_ VDN_ABAN> hvdn

17

Integrated Reports Descriptions

Introduction

This chapter includes the following sections:

- About Integrated Reports
- Agent—Graphical Information
- Agent—Information
- Split/Skill—Comparison Report
- Split/Skill—Graphical Split/Skill View
- VDN—Graphical Call Handling.

About Integrated Reports

There are a series of Integrated Supervisor reports that are available only when you are using the Supervisor application (they are not available through Terminal or standard CMS).

Only reports that are available exclusively through Supervisor are described in this chapter. For descriptions of CMS reports that are not described in this chapter, see the *CentreVu™ CMS Real-Time and Historical Reports* document (585-215-821).

An Integrated report combines real-time and historical data for a current view of the day. For general information about Integrated reports, see Chapter 4, “Reports Basics” and Chapter 5, “Reports.”

The Integrated reports are identified in the following table:

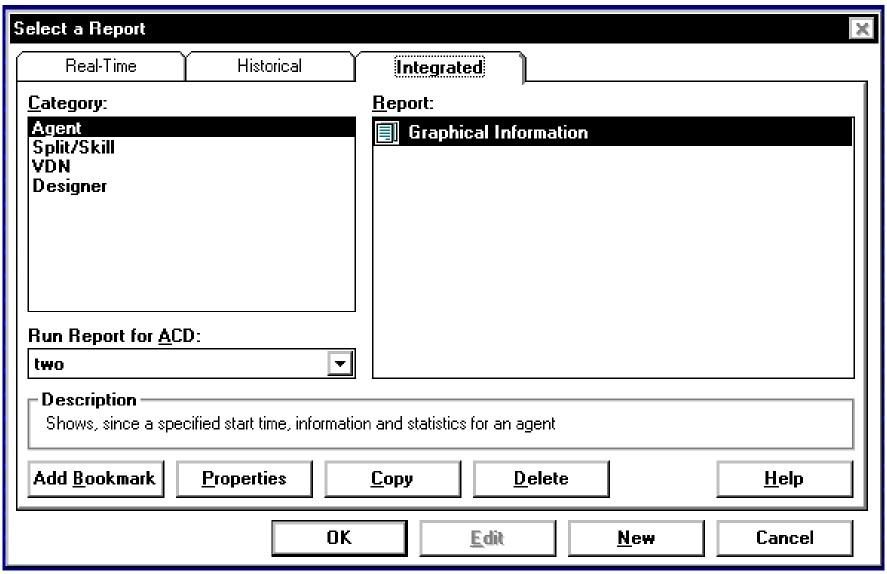
Category	**Report Name**	**Real-Time**	**Historical**	**Integrated**
Agent	Graphical Information	❏		❏
	Information	❏		❏
Split/Skill	Comparison			❏
	Graphical ASA		❏	
	Graphical AUX Agents	❏		
	Graphical AUX Top Agents	❏		
	Graphical Call Profile	❏	❏	
	Graphical EWT	❏		
	Graphical Queue	❏		
	Graphical Service Level		❏	
	Graphical Skill Time Spent		❏	
	Graphical Split/Skill View			❏
	Graphical Status	❏		
	Graphical Time Spent		❏	
	Graphical Top Skill Status	❏		
	Top Agent Work State	❏		
	Work State Report	❏		

Category	Report Name	Real-Time	Historical	Integrated
VDN	Graphical Call Handling			❑
	Graphical Call Profile	❑	❑	
	Graphical Service Level		❑	

Note "Graphical ...." reports may not be available on the Real-Time Report tab if they are not valid for your switch type or the features you purchased.

Integrated Agent Category Tab

The following is an example of the reports that may be available in the Agent Category from the Integrated Report tab depending on your switch type and whether you have purchased the EAS or Vectoring feature.



Agent—Graphical Information

This report shows information and statistics for an agent for a specified start time.

Things to Know About This Report

- You can access this report in the following ways:
  - — From the Integrated Agent Category selector menu.
  - — By drilling down to this report from the Agent Name or Login ID fields on other reports (for example, Work State or Graphic AUX Agent reports).
- This report is available in two forms:
  - — Generic 3 Version 5 switches with the EAS feature
  - — Pre-Generic 3 Version 5 switches with the EAS feature.

Note If you are using a switch that does not have the EAS feature, see the “Agent—Information” report in this chapter for details.

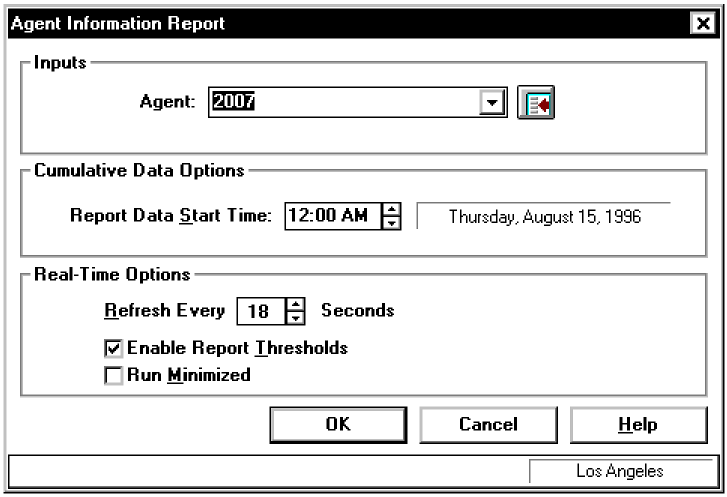
- This report is available for all switch releases. The contents of this report depend upon the switch release for which it is being run.
- Supervisors can use this report to access further information on one particular agent without having to execute several steps and several different reports to get the pertinent information. This report enables supervisors to quickly decide whether an agent should be added to or removed from a skill.
- The following example of this report shows the information it will contain for the *DEFINITY*® Enterprise Communications Server (ECS) Release 5 switch:
  - — Graphical information: a two-dimensional bar chart that shows the time the agent has spent in each of the work states since the report data start time.

    Above the bar chart is the text “Agent Time Spent.”

— Grid information: a grid that shows the skills which are assigned to the agent, and the corresponding skill level.

A scroll bar is provided if the number of skills to which the agent is assigned exceeds the default size of this grid.

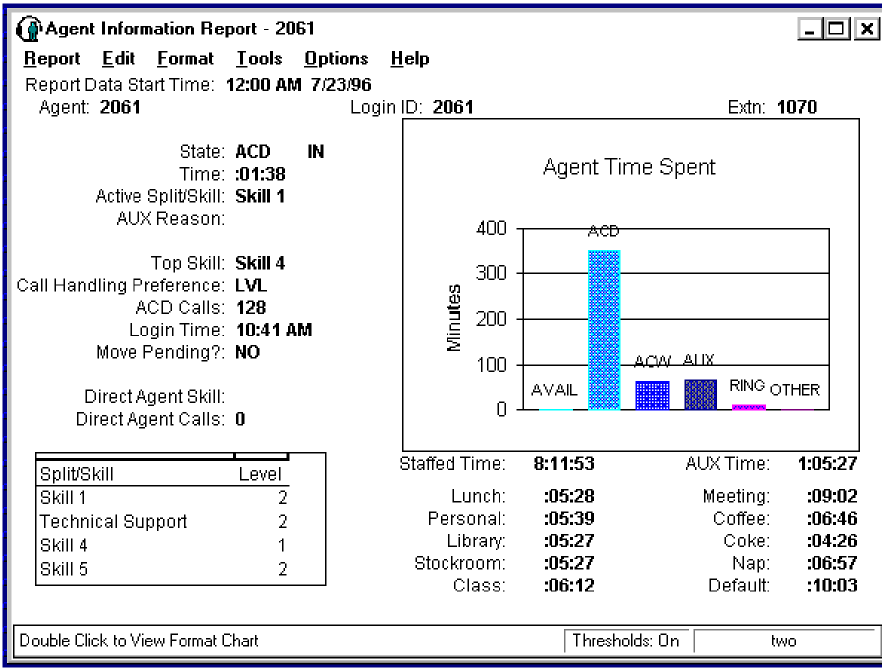
Input Window



Item	Description
Agent:	Enter the name of the agent. The agent's name must be defined in the Dictionary subsystem; otherwise, you will see the agent IDs.
Report Data Start Time:	Enter the day and time (either in military time or with AM / PM specified) you want the report to start collecting data. The time entered (or the time adjusted to the nearest previous interval start time relative to the entered time) is used to populate the Report Data Start Time field on the report. NOTE: If no report start time is available, the start time will be midnight of the current day. The report start time must be less than 24 hours before the current time.

Item	Description
Refresh Every <#> Seconds	Enter the number of seconds (3 to 600) to specify how rapidly *CentreVu* CMS should update the report data. The default for the Refresh rate in seconds: field in this window is your assigned minimum refresh rate plus 15 seconds. To find out what your minimum refresh rate is, or to change it, check with your *CentreVu* CMS administrator.
Enable Report Thresholds	Check this box to turn on the thresholds for the report. For more information, see the “Setting Report threshold Highlights” section in Chapter 5, “Reports.”
Run Minimized	Check this box to minimize the report.

Report Example



Report Heading	Description	Database Item/ Calculation, Table Name
Report Data Start Time:	The day and time that the report started collecting data.	No database item.
Agent:	The names (or agent IDs if the names have not been assigned in Dictionary) of the agents assigned and logged into this split/skill.	syn(LOGID) cagent
Login ID:	The login identification of the agent.	LOGID cagent
Extn:	The extension that the agent logged in from.	EXTENSION cagent

Report Heading	Description	Database Item/ Calculation, Table Name
State:	The current work mode (state) that the agent is in (AVAIL, ACD, ACW, AUX, DACD, DACW, RING, UNKNOWN, OTHER, UNSTAFF) and the call direction (blank, IN or OUT).	syn(AWORKMODE) and syn(DIRECTION) cagent
Time:	The time that the agent has been in the current work mode (AVAIL, ACD, etc.) and the call direction. Time is reset whenever the work mode or call direction changes. For example, if the agent goes from AUX-IN to AUX, the time starts over.	AGTIME cagent
Active Split/Skill:	When an agent is on a split / skill or direct agent ACD call or in ACW, this is the split / skill associated with the call or ACW. When an agent is available, in AUX or in OTHER, this is null (blank). When an agent is on an AUXIN / AUXOUT call, this is the OLDEST_LOGON split / skill. When an agent is on an AUXIN / AUXOUT call from the available state, while in AUX or with an AUXIN / AUXOUT call on hold, this is the OLDEST_LOGON split / skill. When an agent is on an AUXIN call with an ACD call on hold, this is the OLDEST_ LOGON split / skill. When an agent is on an AUXOUT call with an ACD call on hold, this is the split / skill associated with the ACD call.	syn(WORKSKILL) cagent
AUX Reason:	The reason code associated with the agent current state. This is blank if the agent is not in the AUX state. For agents in AUX on switch releases that are earlier than the ECS or that do not have EAS and reason codes active, this will only be 0 (zero).	syn(AUXREASON) cagent

Report Heading	Description	Database Item/ Calculation, Table Name
Top Skill:	The agent's first-administered, highest-level, measured skill, where skill level 1 is the highest, and skill level 16 is the lowest.	syn(TOPSKILL) cagent
Call Handling Preference:	The agent's call handling preference. Values are blank, skill level (LVL) or greatest need (NEED).	syn(PREFERENCE) cagent
ACD Calls:	The queued ACD calls to the split/skill that were answered by an agent in the split/skill. This does not include direct agent calls, but it does include ACD calls placed by an adjunct (outbound predictive dialing - Generic 2.2 switches with ASAI Gateway or Generic switches with ASAI only).	sum(ACDCALLS) hagent, cagent
Login Time:	The time of the day that the agent logged into this SPLIT. This field is not set unless the agent is logged in. Values include NULL and time-of-day.	LOGONSTART cagent
Move Pending?:	A move to a new split or skill or a change of skills is pending for this agent. This is available only for Generic 3 Version 4 and later switch releases with the "Move Agent While Staffed" feature.	MOVEPENDING cagent
Direct Agent Skill:	The skill that is currently assigned as the agent's direct agent skill. Direct agent calls to the agent are queued to this skill.	syn(DA_SKILL) cagent
Direct Agent Calls:	The number of direct agent ACD calls that the agent answered.	DA_ACDCALLS cagent
Split/Skill:	The split/skill number for which the data was collected.	syn(SPLIT) cagent
Level:	The skill level (1-16) that is associated with the SPLIT.	LEVEL cagent

Report Heading	Description	Database Item/ Calculation, Table Name
AVAIL	The time during the collection interval that the agent was in the available state for split/skill or direct agent ACD calls in any split/skill. TI_AVAILTIME is recorded for the split/skill that was the OLDEST_LOGON. For non-EAS operation, if an agent logged into multiple splits in AUX mode in one split and is available for ACD calls in another split. The agent accrues I_AVAILTIME for the split in which the agent is available and TI_AVAILABLE in the split logged into the longest.	sum(TI_AVAILTIME) hagent, cagent
ACD	The time during the collection interval that the agent was talking on ACD calls for the SPLIT.	sum(I_ACDTIME+ I_DA_ACDTIME) hagent, cagent
ACW	The total time during the collection interval that the agent was in after call work (ACW). This includes ACW for split/skill ACD calls and ACW not associated with the call.	sum(I_ACWTIME+ I_DA_ACWTIME) hagent, cagent
AUX	The time during the collection interval that the agent was in AUX in all splits/skills or on AUXINCALLS or AUXOUTCALLS. "TI__" stands for the time that is stored for the split/skill logged into the longest.	sum(TI_AUXTIME) hagent, cagent
RING	The time during the collection interval that the agent had split/skill and direct agent ACD calls ringing. If the agent changes work modes or answers/makes another call instead of answering the ringing call, I_RINGTIME will stop accumulating. RINGTIME is the time the caller spends ringing and is independent of agent activity.	sum(I_RINGTIME) hagent, cagent

Report Heading	Description	Database Item/ Calculation, Table Name
OTHER	The time during the collection interval that the agent was doing other work in all splits/skills. For Generic 3 switches, while in Auto-in or Man-In: the agent put any call on hold and performed no further action, the agent dialed to place a call or to activate a feature, or an extension call rang with no other activity. For Generic 2.2, the agent pushed the Hold button or flashed the switchhook from Auto-in or Manual-in mode and performed no further action. For all switches, TI_OTHERTIME is collected for the time period after the link to the switch comes up or after the agent logs in and before the CMS receives notification of the agent's state from the switch.	sum(TI_OTHERTIME) hagent, cagent
Staffed Time:	The time during the collection interval that the agent was staffed in any split/skill. The "TI_" stands for the time that is stored only for the split or skill that the agent is logged into for the longest amount of time.	sum(TI_STAFFTIME) hagent, cagent
AUX Time:	The time during the collection interval that the agent was in AUX in all splits/skills or on AUXINCALLS or AUXOUTCALLS. The "TI_" stands for the time that is stored only for the split or skill that the agent is logged into for the longest amount of time.	sum(TI_AUXTIME) hagent, cagent

Report Heading	Description	Database Item/ Calculation, Table Name
Reason Code	The time that the agent spent in active AUX reason codes. It is the same as TI_AUXTIME for switches without AUX reason codes active. The "TI_" stands for the time that is stored only for the skill that the agent is logged into for the longest amount of time.	sum(TI_AUXTIME0) hagent, cagent
Reason Code	The time that the agent spent in AUX with each of the reason codes 1-9.The "TI_" stands for the time that is stored only for the skill that the agent is logged into for the longest amount of time.	sum(TI_AUXTIME1 through 9) hagent, cagent

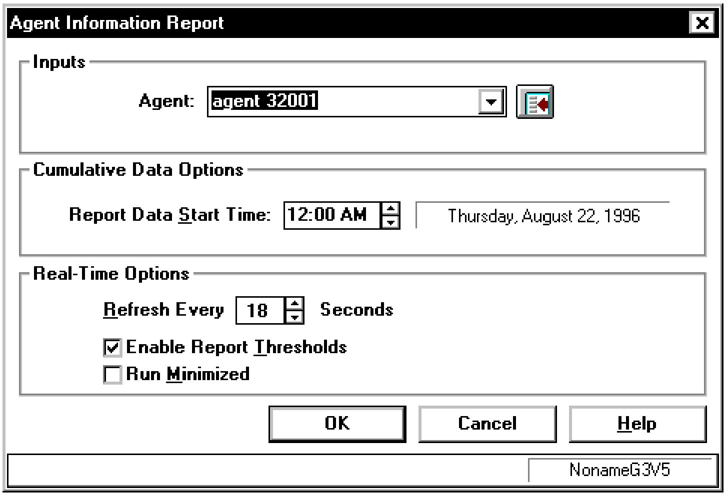
Agent—Information

This version of the Agent Information report shows information and statistics for an agent for a specified start time.

Things to Know About This Report

- This report is not available with the EAS feature.
- You can access this report as follows:
  - From the Integrated Agent Category selector menu.
  - By drilling down to this report from the Agent Name or Login ID fields on other reports (for example, Agent Information, Work State, or Graphic AUX Agent reports).
- Drilling down to this report gives the user the ability to select a real-time or integrated version of a drill-down report.
- When a Supervisor user drills down from an agent name to an Agent Information report and selects an integrated report, the report data start time defaults to the start time specified in the last integrated report input window. If no integrated report has ever been entered, the default is set to midnight. You have the ability to restart this report just as any other Supervisor report can be restarted, and a different report start time can be specified when the report is restarted.

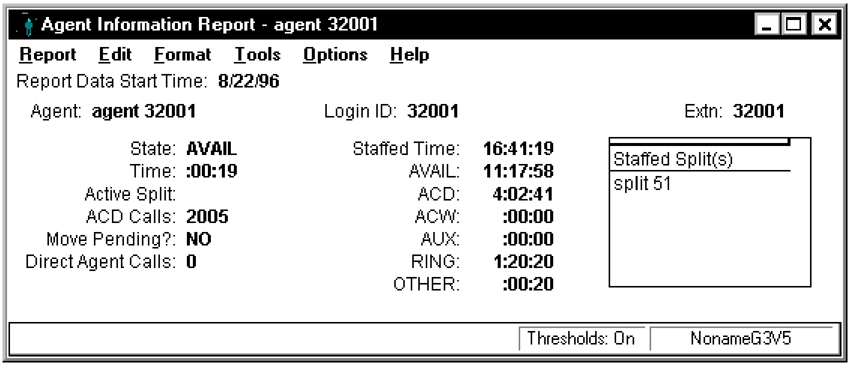
Input Window



Field	Description
Agent:	Enter the name of the agent assigned to the split and logged in. The agent's name must be defined in the Dictionary subsystem; otherwise, you will see the agent IDs.
Report Data Start Time	Enter the day and time (either in military time or with AM/PM specified) you want the report to start collecting data. The time entered (or the time adjusted to the nearest previous interval start time relative to the entered time) is used to populate the Report Data Start Time field on the report. NOTE: If no report start time is available, the start time will be midnight of the current day. The report start time must be less than 24 hours before the current time.

Field	Description
Refresh Every <#> **Seconds**	Enter the number of seconds (3 to 600) to specify how rapidly *CentreVu* CMS should update the report data. The default for the Refresh rate in seconds: field in this window is your assigned minimum refresh rate plus 15 seconds. To find out what your minimum refresh rate is, or to change it, check with your *CentreVu* CMS administrator.
Enable Report Thresholds	Check this box to turn on the thresholds for the report. For more information, see the “Setting Report threshold Highlights” section in Chapter 5, “Reports.”
Run Minimized	Check this box to minimize the report.

Report Example



Report Heading	Description	Database Item/ Calculation, Table Name
Report Data Start Time:	The day and time that the report started collecting data.	No database item.
Agent:	The names (or agent IDs if the names have not been assigned in Dictionary) of the agents assigned and logged into this split/skill.	syn(LOGID)
Login ID:	The login identification of the agent.	LOGID cagent
Extn:	The extension that the agent logged in from.	EXTENSION cagent
State:	The current work mode (state) that the agent is in (AVAIL, ACD, ACW, AUX, DACD, DACW, RING, UNKNOWN, OTHER, UNSTAFF) and the call direction (blank, IN or OUT).	syn(AWORKMODE) and syn(DIRECTION) cagent
Time:	The time that the agent has been in the current work mode (AVAIL, ACD, etc.) and the call direction. Time is reset whenever the work mode or call direction changes. For example, if the agent goes from AUX-IN to AUX, the time starts over.	AGTIME cagent

Report Heading	Description	Database Item/ Calculation, Table Name
Active Split:	When an agent is on a split or direct agent ACD call or in ACW, this is the split associated with the call or ACW. When an agent is available, in AUX or in OTHER, this is null (blank). When an agent is on an AUXIN / AUXOUT call, this is the OLDEST_LOGON split. When an agent is on an AUXIN / AUXOUT call from the available state, while in AUX or with an AUXIN / AUXOUT call on hold, this is the OLDEST_LOGON split / skill. When an agent is on an AUXIN call with an ACD call on hold, this is the OLDEST_LOGON split. When an agent is on an AUXOUT call with an ACD call on hold, this is the split associated with the ACD call.	syn(WORKSKILL) cagent
ACD Calls:	The queued ACD calls to the split / skill that were answered by an agent in the split / skill. This does not include direct agent calls, but it does include ACD calls placed by an adjunct (outbound predictive dialing - Generic 2.2 switches with ASAI Gateway or Generic switches with ASAI only).	sum(ACDCALLS) hagent, cagent
Move Pending?:	A move to a new split or skill or a change of skills is pending for this agent. This is available only for Generic 3 Version 4 and later switch releases with the “Move Agent While Staffed” feature.	MOVEPENDING hagent, cagent
Direct Agent Calls:	The number of direct agent ACD calls that the agent answered.	sum(DA_ACDCALLS) hagent, cagent

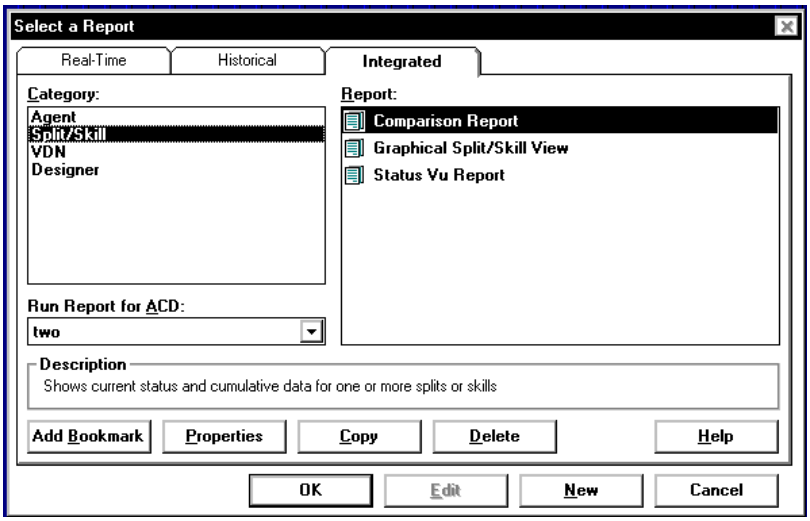
Chapter 17

Report Heading	Description	Database Item/ Calculation, Table Name
Staffed Time:	Current number of top agents that are staffed in the skill.	sum(TI_STAFFTIME) hagent, cagent
AVAIL	The time during the collection interval that the agent was in the available state for split / skill or direct agent ACD calls in any split / skill. TI_AVAILTIME is recorded for the split / skill that was the OLDEST_LOGON. For non-EAS operation, if an agent logged into multiple splits in AUX mode in one split and is available for ACD calls in another split. The agent will accrue I_AVAILTIME for the split in which the agent is available and TI_AVAILABLE in the split logged into the longest.	sum(TI_AVAILTIME) hagent, cagent
ACD	The time during the collection interval that the agent was talking on ACD calls for the SPLIT.	sum(I_ACDTIME+ I_DA_ACDTIME) hagent, cagent
ACW	The time during the collection interval that the agent was in after call work (ACW). This includes ACW for split / skill ACD calls and ACW not associated with the call.	sum(I_ACWTIME+ I_DA_ACWTIME) hagent, cagent
AUX	The time during the collection interval that the agent was in AUX in all splits / skills or on AUXINCALLS or AUXOUTCALLS. The “TI_” stands for the time that is stored only for the split or skill that the agent is logged into for the longest amount of time.	sum(TI_AUXTIME) hagent, cagent

Report Heading	Description	Database Item/ Calculation, Table Name
RING	The time during the collection interval that the agent had split/skill and direct agent ACD calls ringing. If the agent changes work modes or answers/makes another call instead of answering the ringing call, I_RINGTIME will stop accumulating. RINGTIME is the time the caller spends ringing and is independent of agent activity.	sum(I_RINGTIME) hagent, cagent
OTHER	The time during the collection interval that the agent was doing other work in all splits/skills. For Generic 3 switches, while in Auto-in or Man-In: the agent put any call on hold and performed no further action, the agent dialed to place a call or to activate a feature, or an extension call rang with no other activity. For Generic 2.2, the agent pushed the Hold button or flashed the switchhook from Auto-in or Manual-in mode and performed no further action. For all switches, TI_OTHERTIME is collected for the time period after the link to the switch comes up or after the agent logs in and before the CMS receives notification of the agent's state from the switch.	sum(TI_OTHERTIM E) cagent
Staffed Split(s)	The split number for which the data was collected.	syn(SPLIT) cagent

Integrated Split/Skill Category Tab

The following is an example of the reports that may be available in the Split/Skill Category from the Integrated Report tab depending on your switch type and whether you have purchased the EAS or Vectoring feature.



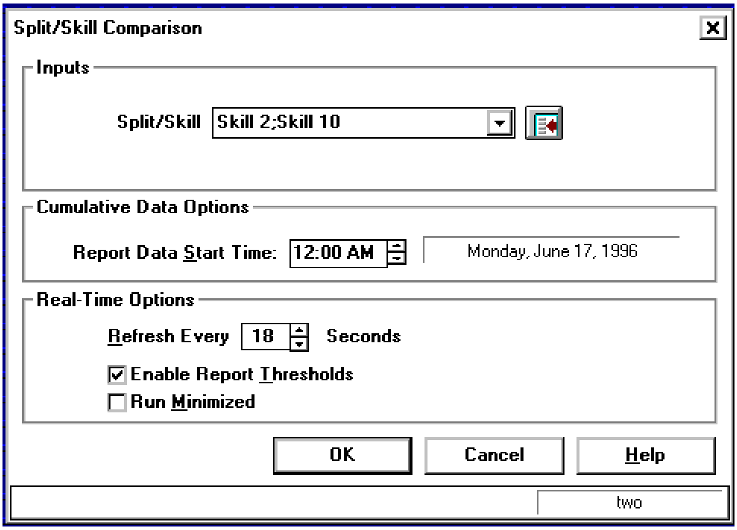
Split/Skill—Comparison Report

This report shows the current status and cumulative data for one or more splits/skills.

Things to Know About This Report

- Call center supervisors or administrators who are responsible for several splits/skill, can use this report to see if splits/skills have comparable talk times, abandon rates, and average speed of answer figures that are comparable up until a certain point in the day.
- You can access this report from the Integrated Split/Skill Category selector menu.

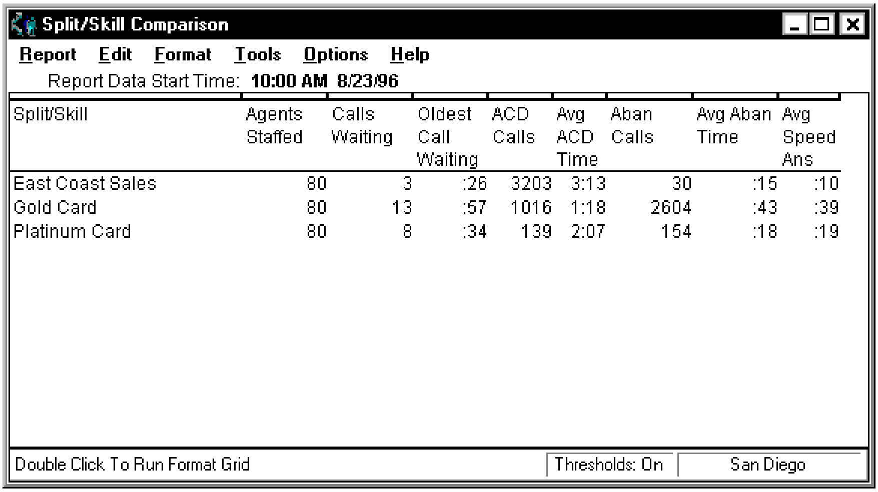
Input Window



Field	Description
Split/Skill	Enter the appropriate split / skill name(s). Any name you want to appear on the report must have been previously defined and entered in the Dictionary subsystem.
Report Data Start Time:	Enter the day and time (either in military time or with AM / PM specified) you want the report to start collecting data. The time entered (or the time adjusted to the nearest previous interval start time relative to the entered time) is used to populate the Report Data Start Time field on the report. NOTE: If no report start time is available, the start time will be midnight of the current day. The report start time must be less than 24 hours before the current time.

Field	Description
Refresh Every <#> **Seconds**	Enter the number of seconds (3 to 600) to specify how rapidly *CentreVu* CMS should update the report data. The default for the Refresh rate in seconds: field in this window is your assigned minimum refresh rate plus 15 seconds. To find out what your minimum refresh rate is, or to change it, check with your *CentreVu* CMS administrator.
Enable Report Thresholds	Check this box to turn on the thresholds for the report. For more information, see the “Setting Report threshold Highlights” section in Chapter 5, “Reports.”
Run Minimized	Check this box to minimize the report.

Report Example


Split/Skill Comparison

Report Edit Format Tools Options Help

Report Data Start Time: **10:00 AM 8/23/96**

Split/Skill	Agents Staffed	Calls Waiting	Oldest Call Waiting	ACD Calls	Avg ACD Time	Aban Calls	Avg Aban Time	Avg Speed Ans
East Coast Sales	80	3	:26	3203	3:13	30	:15	:10
Gold Card	80	13	:57	1016	1:18	2604	:43	:39
Platinum Card	80	8	:34	139	2:07	154	:18	:19

Double Click To Run Format Grid | Thresholds: On | San Diego

Report Heading	Description	Database Item/ Calculation, Table Name
Report Data Start Time:	The day and time that the report started collecting data.	No database item.
Split/Skill:	The name or number of the split(s)/skill(s) selected for the report.	syn(SPLIT) csplit
Agents Staffed	The number of agents logged into each split/skill.	STAFFED csplit
Calls Waiting	The total number of ACD calls waiting to be answered for each split/skill in the report. This includes calls that are in queue and ringing at an agent voice terminal. It also includes outbound ACD calls placed by an adjunct (also called outbound predictive dialing), for the Generic 2.2 switches with ASAI Gateway or the Generic 3 with ASAI only. For the Generic 3 switches, it does not include direct agent calls.	INQUEUE+INRING csplit

Report Heading	Description	Database Item/ Calculation, Table Name
Oldest Call Waiting	The number of seconds that the oldest call has waited in queue or ringing at an agent voice terminal for each split/skill in the report. This does not include direct agent calls.	OLDESTCALL csplit
ACD Calls	The ACD calls that were queued to the split/skill and answered by an agent. This does not include direct agent calls, but it does include ACD calls placed by an adjunct (also called outbound predictive dialing), for the Generic 2.2 switches with ASAI Gateway or the Generic 3 with ASAI only.	ACDCALLS hsplit, csplit
Avg ACD Time	The average talk time for all ACD calls to the split. This does not include hold time on direct agent calls, but it does include talk time of all outbound ACD calls placed by an adjunct (also called outbound predictive dialing), for the Generic 2.2 switches with ASAI Gateway or the Generic 3 with ASAI only.	ACDTIME / ACDCALLS <AVG_ACD_TALK_TIME> hsplit, csplit
Aban Calls	The total number of queued calls for each split/skill that abandoned before an agent answered. This includes calls that are ringing at a voice terminal but does not include direct agent calls. It also includes the number of outbound calls for each split/skill that abandoned at the far end before an agent answered. For the Generic 2.2 switches with ASAI Gateway Interface feature or the Generic 3 with the ASAI feature only.	ABNCALLS hsplit, csplit
Avg Aban Time	The average time a caller waited before hanging up.	ABNTIME / ABNCALLS hsplit, csplit

Chapter 17

Report Heading	Description	Database Item/ Calculation, Table Name
Avg Speed Ans	The average time calls waited in queue and ringing before an agent answered. This does not include direct agent calls, but it does include outbound ACD calls placed by an adjunct (also called outbound predictive dialing), for the Generic 2.2 switches with ASAI Gateway or the Generic 3 with ASAI only.	ANSTIME / ACDCALLS <AVG_ANSWER_ SPEED> hsplit, csplit

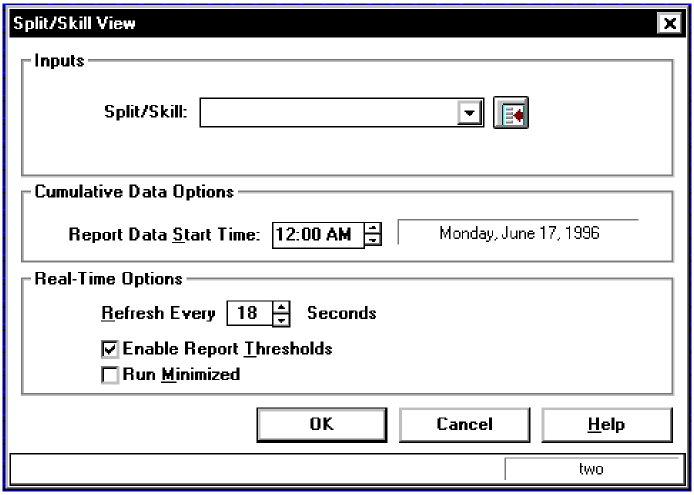
Split/Skill—Graphical Split/Skill View

This report shows the status of agents in the split/skill, and cumulative split/skill statistics.

Things to Know About This Report

- You may want to use this report if you have large numbers of agents in one split or skill who need split/skill status but do not want to consume the PC resources required to display individual agent status of many agents.
- Call center managers may also use this report to see the totals and averages for a specific split or skill up to a certain point in the day.

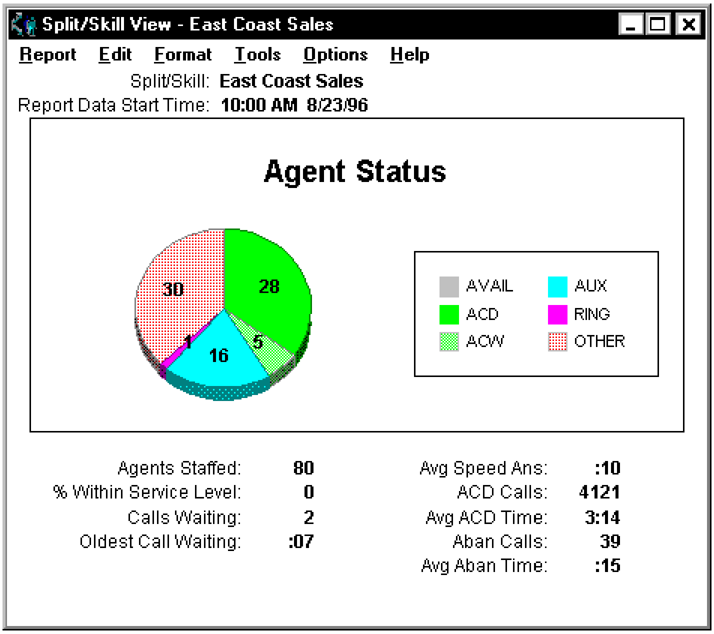
Input Window



Field	Description
Split/Skill:	Enter the appropriate split/skill name(s) or number(s). Any name you want to appear on the report must have been previously defined and entered in the Dictionary subsystem.
Report Data Start Time:	Enter the day and time (either in military time or with AM/PM specified) you want the report to start collecting data. The time entered (or the time adjusted to the nearest previous interval start time relative to the entered time) is used to populate the Report Data Start Time field on the report. NOTE: If no report start time is available, the start time will be midnight of the current day. The report start time must be less than 24 hours before the current time.

Field	Description
Refresh Every <#> Seconds	Enter the number of seconds (3 to 600) to specify how rapidly *CentreVu* CMS should update the report data. The default for the Refresh rate in seconds: field in this window is your assigned minimum refresh rate plus 15 seconds. To find out what your minimum refresh rate is, or to change it, check with your *CentreVu* CMS administrator.
Enable Report Thresholds	Check this box to turn on the thresholds for the report. For more information, see the “Setting Report Threshold Highlights” section in Chapter 5, “Reports.”
Run Minimized	Check this box to minimize the report.

Report Example



Report Heading	Description	Database Item/ Calculation, Table Name
Split/Skill:	The name or number of the split(s)/skill(s) selected for the report.	syn(SPLIT) csplit
Report Data Start Time:	The day and time that the report started collecting data.	No database item.
AVAIL	The current number of agents that are available to receive ACD calls in this split/skill.	AVAILABLE csplit
ACD	The total number of agents connected to inbound and outbound ACD calls in each split/skill. This does not include direct agent calls.	ONACD csplit

Report Heading	Description	Database Item/ Calculation, Table Name
ACW	The current number of POSITIONS that are in after call work for this split/skill. This includes agents on ACW-IN/ACW-OUT calls as well as agents in ACW not associated with an ACD call. It does not include agents in ACW for direct agent ACD calls.	INACW csplit
AUX	The current number of POSITIONS that are in auxiliary work for all splits/skills or on AUX-IN/AUX-OUT calls.	INAUX csplit
RING	The current number of POSITIONS that are in the "ring" state, for this split/skill. For example, the positions that have a split/skill or direct agent ACD call ring for this split/skill and are not doing anything else. Note: When an agent makes or answers an extension call while an ACD call is ringing, that position is no longer counted in AGINRING (because the agent is then on an AUXIN/OUT call). Agents talking on ACD calls who receive a forced MCH call (for Generic 3 Version 4 switches and later) are not counted in AGINRING (they are counted in ONACD).	AGINRING csplit
OTHER	The current number of POSITIONS that are doing other work.	OTHER csplit
Agents Staffed:	The number of agents logged into the split/skill.	STAFFED csplit

Report Heading	Description	Database Item/ Calculation, Table Name
% Within Service Level:	The percentage of split/skill ACD calls that were answered by an agent within the predefined acceptable service level. Calls to the split/skill include abandoned calls, calls not answered, and outbound ACD calls placed by an adjunct (for example, outbound predictive dialing - Generic 2.2 switches with the ASAI Gateway Interface feature or Generic 3 switches with the ASAI feature). Calls that were not answered may include forced busy calls, forced disconnect calls, calls redirected to another destination, and calls queued to more than one split and answered in another split/skill. For Generic 3 switches, Percent Within Service Level does not include direct agent calls.	100*(ACCEPTABLE/ CALLSOFFERED) sum(PERCENT_ SERV_LVL_SPL) <PERCENT_SERV_L VL_SPL> csplit
Calls Waiting	The total number of split/skill ACD calls waiting to be answered. This includes calls that are in queue and ringing at an agent voice terminal and outbound ACD calls placed by an adjunct (for example, outbound predictive dialing - Generic 2.2 switches with the ASAI Gateway Interface feature or Generic 3 switches with the ASAI feature). It does not include direct agent calls (Generic 3 switches only).	INQUEUE + INRING csplit
Oldest Call Waiting:	The number of seconds that the oldest ACD call has waited in queue or ringing before being answered. This does not include direct agent calls.	OLDESTCALL csplit

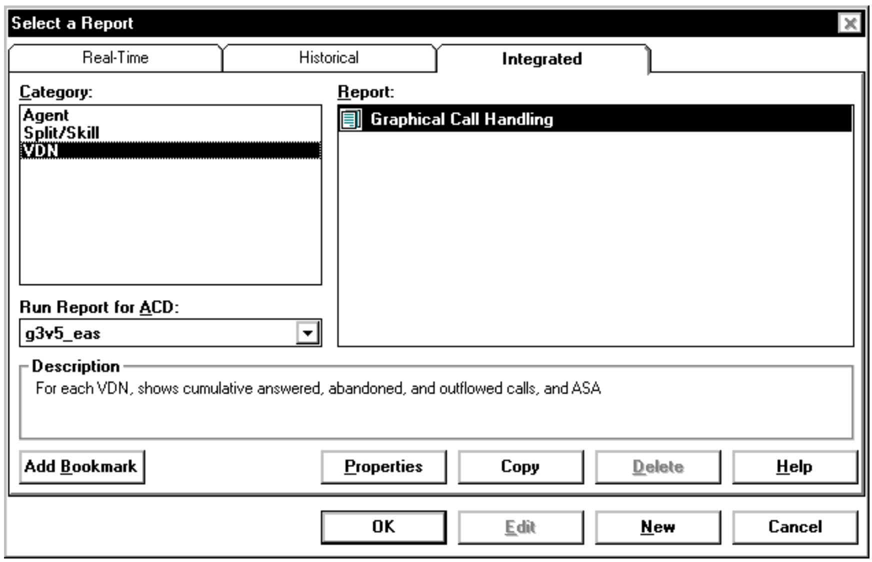
Report Heading	Description	Database Item/ Calculation, Table Name
Avg Speed Ans:	The average time that calls waited in queue or ringing before an agent answered. This does not include direct agent calls, but it does include outbound ACD calls placed by an adjunct (outbound predictive dialing - Generic 2.2 switches with ASAI Gateway Interface feature or Generic 3 with the ASAI feature only).	ANSTIME / ACDCALLS <AVG_ANSWER_SPEED> hsplit, csplit
ACD Calls:	The queued ACD calls to the split/skill that were answered by an agent. This does not include direct agent calls, but it does include ACD calls placed by an adjunct (outbound predictive dialing - Generic 2.2 switches with ASAI Gateway or Generic 3 with ASAI only).	ACDCALLS hsplit, csplit
Avg ACD Time:	The average talk time (does not include hold time) for all ACD calls to this split/skill. This does not include direct agent calls, but it does include talk time of all ACD calls placed by an adjunct (outbound predictive dialing - Generic 2.2 switches with ASAI Gateway Interface feature or Generic 3 with the ASAI feature only).	<AVG_ACD_TALK_TIME> hsplit, csplit
Aban Calls:	The total number of queued calls for each split/skill that abandoned before an agent answered. This includes calls that are ringing at a voice terminal but does not include direct agent calls. It also includes the number of outbound calls for each split/skill that abandoned at the far end before an agent answered (Generic 2.2 switches with ASAI Gateway Interface feature or Generic 3 with the ASAI feature only).	ABNCALLS csplit

Chapter 17

Report Heading	Description	Database Item/ Calculation, Table Name
Avg Aban Time:	The average time a caller waited before hanging up.	ABNTIME / ABNCALLS <AVG_ABANDON_ TIME> hsplit, csplit

Integrated VDN Category Tab

The following is an example of the reports that may be available in the VDN Category from the Integrated Report tab depending on your switch type and whether you have purchased the EAS or Vectoring feature.



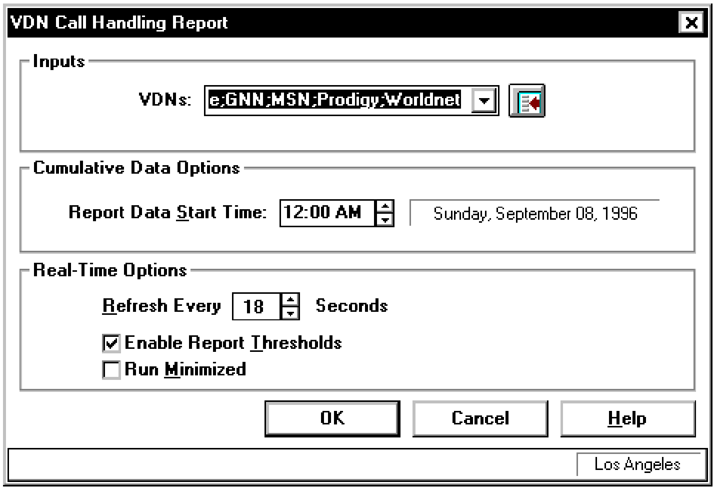
VDN—Graphical Call Handling

This report shows for each VDN, the cumulative number of calls that are answered, abandoned, considered outflow calls, and includes the ASA.

Things to Know About This Report

- This report graphically represents how many ACD calls for each specified VDN were answered, abandoned, or outflowed. It also shows the switch-based average speed of answer for each specified VDN.
- You can access this report from the VDN Category report list on the Integrated tab of the Report Selector window.
- This report consists of two charts. A legend is to the right of each chart.
- The top chart is a three-dimensional, horizontal, color-coded bar chart showing numbers of ACD calls answered, abandoned, and outflowed.
- The bottom chart is a line graph, where the Rolling ASA of each VDN is represented by each color-coded line.
- The chart type can be changed. See the “Formatting Chart Reports” section in Chapter 4, “Reports Basics,” for more information.

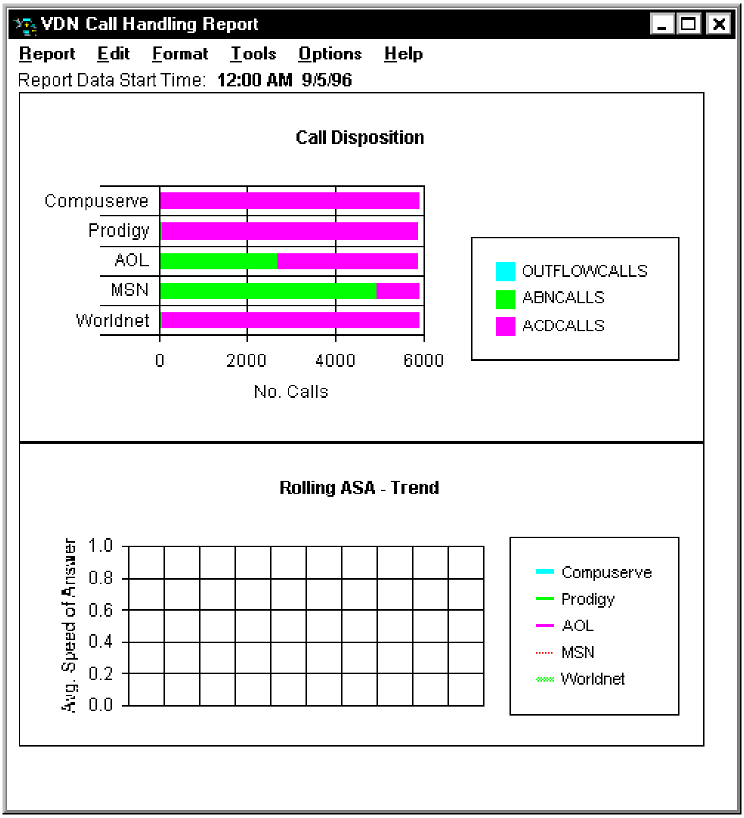
Input Window



Field	Description
VDNs:	Enter the number(s) or name(s) (if they have been defined in the Dictionary) of the VDN(s) that you want to include in the report. You can enter a name only if it has been previously defined in the Dictionary subsystem. To complete the input field, do the following: • Type in the information requested. • Select the information from the pull-down list of previously used items. During each CMS session, Supervisor recalls the items you have selected for each input field. You can use the pull-down list to select an item for the input field. • Use the Browse button to view all available items for the input field, and then select item(s) for the input field. When you click on the Browse button, a window opens that lets you select items for the input field.

Field	Description
Report Data Start Time:	Enter the day and time (either in military time or with AM / PM specified) you want the report to start collecting data. The time entered (or the time adjusted to the nearest previous interval start time relative to the entered time) is used to populate the Report Data Start Time field on the report. NOTE: If no report start time is available, the start time will be midnight of the current day. The report start time must be less than 24 hours before the current time.
Refresh Every <number> Seconds	Enter the number of seconds (3 to 600) to specify how rapidly *CentreVu* CMS should update the report data. The default for the Refresh rate in seconds: field in this window is your assigned minimum refresh rate plus 15 seconds. To find out what your minimum refresh rate is, or to change it, check with your *CentreVu* CMS administrator.
Enable Report Thresholds	Check this box to turn on the thresholds for the report. For more information, see the “Setting Report threshold Highlights” section in Chapter 5, “Reports.”
Run Minimized	Check this box to minimize the report.

Report Example



Report Heading	Description	Database Item/ Calculation, Table Names
Report Data Start Time:	The day and time that the report started collecting data.	No database item.
VDN	The number or name of the VDN for which the report shows data (selected in the report input window).	syn(VDN)

Report Heading	Description	Database Item/ Calculation, Table Names
Rolling ASA	The switch-provided rolling average speed of answer for this VDN. This value is sent to *CentreVu* CMS whenever it changes (for example, when a call is answered) on the Generic 3 Version 4 or later switch with the call vectoring enhancements.	ASA cvdn
Flow Out	The number of calls that were redirected to another VDN or off-switch destination via a “route to” step or “adjunct routing” command, or were redirected to a VDN by redirection on no answer. Calls in the VDN that are routed to other switch destinations, such as splits/skills or extensions, are not counted as outflows from the VDN.	OUTFLOWCALLS hvdn and cvdn
Aban Calls	The number of calls to the ACD during the reporting period that hung up while being carried by this VDN.	ABNCALLS hvdn, cvdn
ACD Calls	The number of split/skill and direct agent ACD calls completed during the reporting period that were answered while carried by the VDN. This includes calls from “queue to main,” “check backup,” “route to” split/skill, and “adjunct routing” to a split/skill or direct agent.	ACDCALLS hvdn, cvdn

18

CentreVu™ Terminal

Introduction

This chapter gives an overview of the Lucent *CentreVu* Terminal Emulator (referred to as Terminal) and teaches you to set up profiles for using Terminal.

The sections in this chapter are as follows:

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

About Terminal

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

Terminal can only be purchased in conjunction with Supervisor.

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

Using Terminal with Supervisor

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

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

* UNIX is a registered trademark of Novell, Inc. in the United States and other countries, licensed exclusively through X/Open Corporation.
† Solaris is a registered trademark of Sun Microsystems, Inc.
‡ INFORMIX is a registered trademark of Informix Software, Inc.

Opening and Exiting Terminal and CMS

This section includes the following information:

- Opening Terminal
- Logging into CMS
- Exiting Terminal.

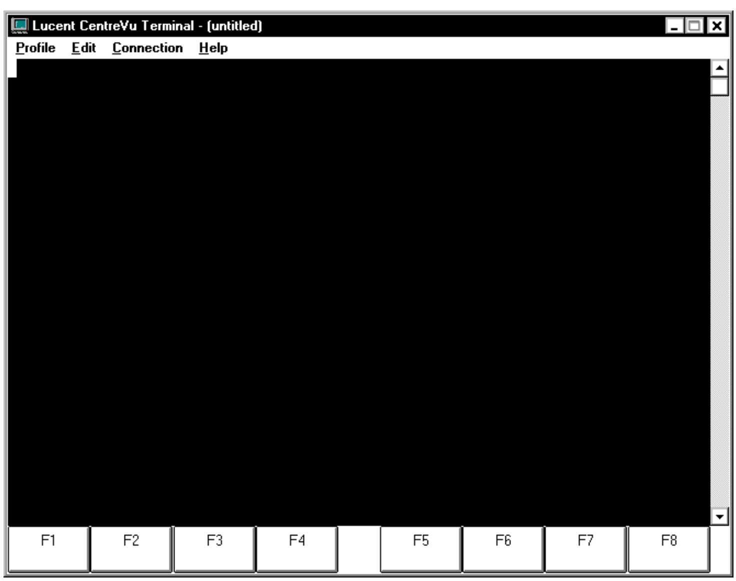
Open Terminal

To open Terminal:

1. For *Windows* 3.1 or *Windows* for Workgroups 3.11: Double click on the *CentreVu* Terminal icon in the Lucent *CentreVu* Supervisor Program Group from the Program Manager.

   For *Windows* 95: Select the *CentreVu* Terminal item in the Lucent *CentreVu* Supervisor sub-menu under Programs from the Start Menu.

2. The Terminal window opens with no connection active:



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

Log Into CMS

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

Note	If you do not have a profile created, refer to the "Creating Profiles" section in this chapter.

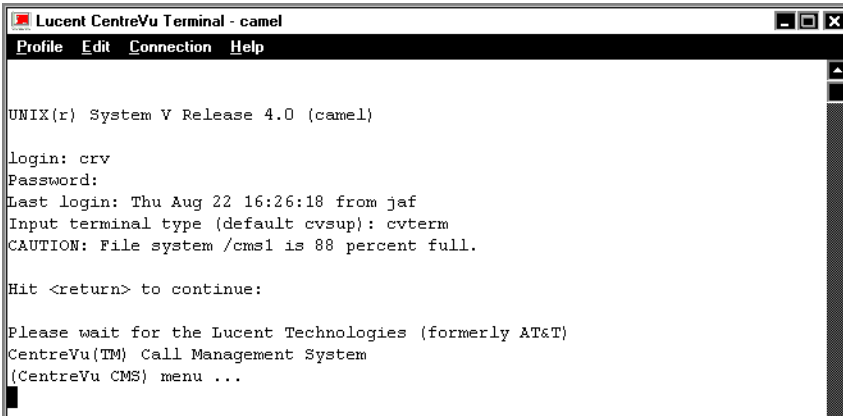
2. Click **Open**.

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

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

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

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



4. At the `Password:` prompt, enter your CMS password (it does not display on the screen), and press Return.

5. At the `Terminal type:` prompt, type **`615c`** or **`CVTERM`**, and press Return.

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

The CMS Main Menu displays.

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

Exiting Terminal

To exit Terminal:

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

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

2. Select OK or press Return in the message window.

3. Select **Exit** from the **Profile** menu.

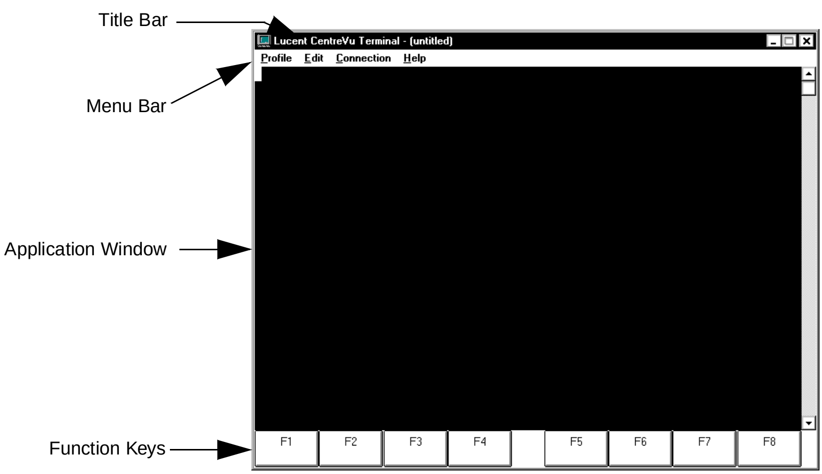
   Note If you select **Exit** or try to close the Terminal window while a connection is active, a message is displayed informing you of this and asking if you want to exit anyway. Select Yes to drop the CMS connection and exit Terminal; select No to keep the connection active and ignore the Exit request.

Using Terminal

This section contains the following information:

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

Terminal Window



The Terminal window contains:

- **Title bar —** Displays “Lucent CentreVu Terminal” and the name of the current connection profile. If no profile is currently selected, “(untitled)” displays instead of the profile name.
- **Menu bar** — Includes the **Profile**, **Edit**, **Connection**, and **Help** options.
- **Application window —** The area of the screen where you log into CMS and use CMS.

- **Function keys —** Initially, the function key labels at the bottom of Terminal's main window are not visible. After you have logged into CMS, the function keys are appropriately labeled and work the same as the standard CMS Screen-Labeled Keys (SLKs).

  See the "User Basics" chapter in the *CentreVu*™ *CMS Administration* (585-215-820) document for definitions of and instructions for using the function keys and their associated menus.

Menu Bar

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

Profile Menu

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

Menu Item	Action
New	Creates a new connection profile. By default, this connection profile is named "profile 1" until you Save it. This item is disabled if there is already a connection active.
Open...	Opens an existing connection profile. Selecting this menu item brings up a window displaying the current profiles. Once you select a profile to open, that profile becomes the first profile in the list of recently accessed profiles. This item is disabled if there is already a connection active.
Save	Saves the current connection profile.

Chapter 18

Menu Item	Action
Save As...	Brings up a window that requests a name under which to save the profile. Existing profile names are listed in the Save Profile As window. You can select one of these names or enter a new profile name in the Profile Name text box. If you use an existing profile name, a message box warns you that you are overwriting the contents of an existing profile.
1...4	The four most-recently opened connection profiles are displayed here. You can choose a numbered profile for quick access. The most recently selected profile you choose becomes profile number 1, with the other items being renumbered accordingly. These items are disabled if there is a connection already active.
Exit	Exits Terminal. If there is a profile that has been modified but not saved, a warning message is displayed.

Edit Menu

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

Menu Item	Action
Copy	Copies the selected text to the *Microsoft Windows* clipboard.

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

Connection Menu

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

Menu Item	Action
Connect	Establishes a connection to a remote host computer as specified in the active connection profile. If a connection is already active, this menu item is disabled.
Disconnect	Disconnects the active connection. If there is no active connection, this menu item is disabled.
Send Break	Sends a “break” sequence to a remote host computer. A break is used to temporarily suspend an operation or transmission. If your connection is “hung up” and the host appears not to respond when you press keys on your keyboard, try sending a break.
Options...	Brings up a window from which you can set up or change Terminal options. Terminal options are grouped under three tabs: **Communications**, **Modem**, and **Font**.

Help Menu

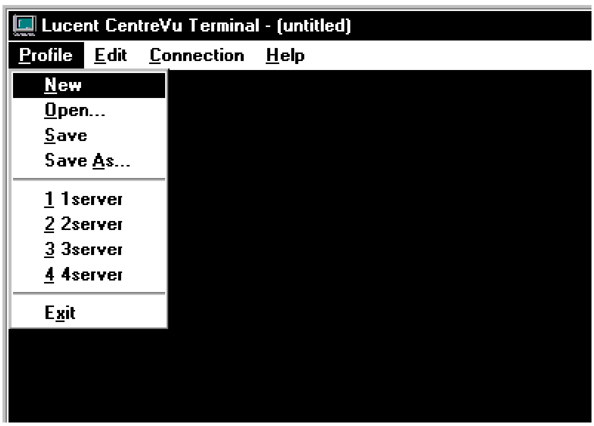
From this menu, you can get on-line help for Terminal. The following table lists the items on the **Help** menu and describes the action each item performs.

Menu Item	Action
Contents	Displays a table of contents of help topics.
Search for Help On...	Allows you to search for a given help topic.
Index	Displays the Terminal help index in a new window.
Technical Support	Shows how to get Terminal technical support.
About...	Opens the Terminal Help About window.

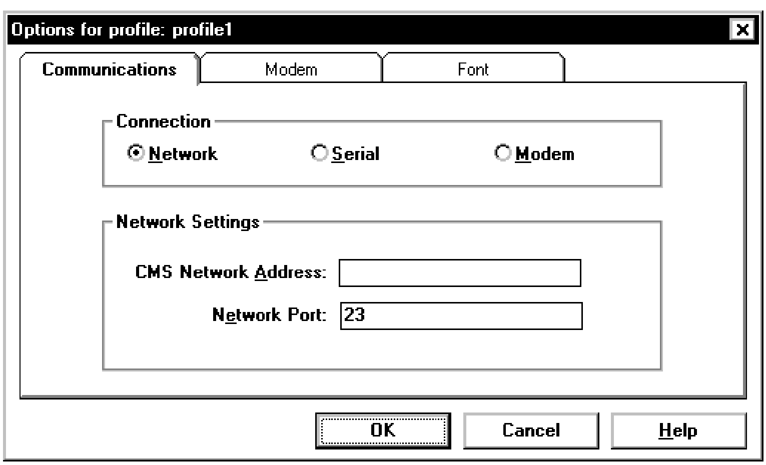
Creating Profiles

To create a profile:

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



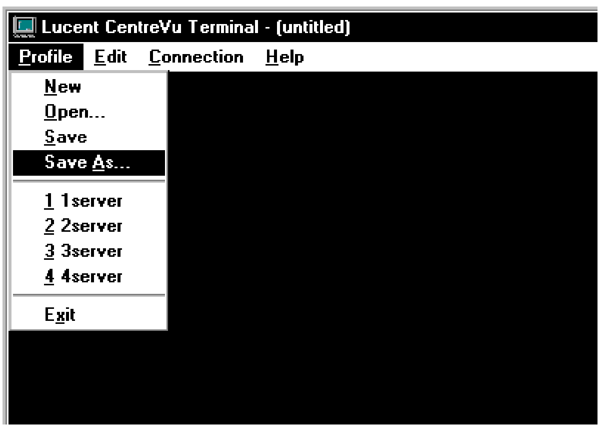
The Options window displays:



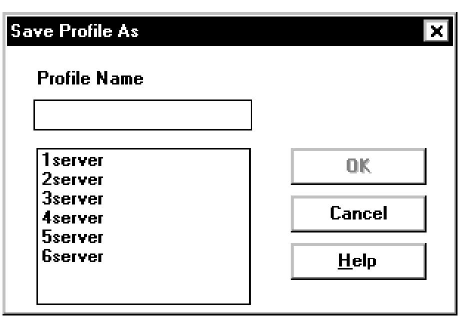
3. Set the Terminal options.

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

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



5. The Save Profile As box displays:



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

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

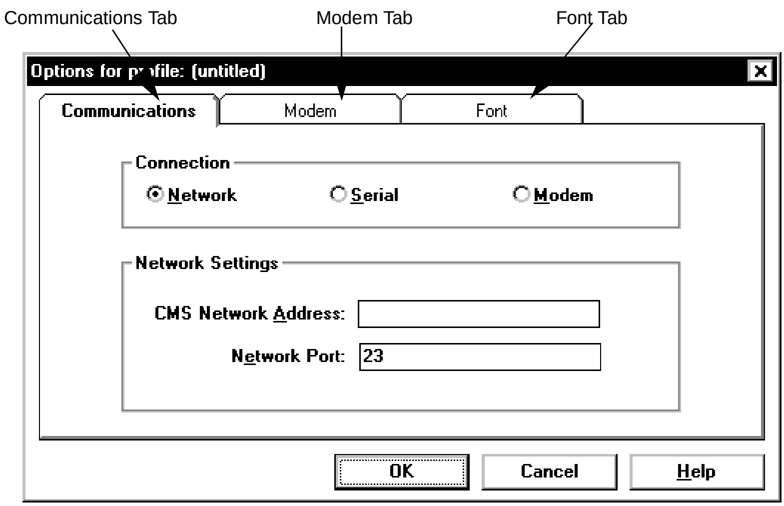
Editing Profiles

To edit an existing profile:

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

Setting Profile Options

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



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

- Select OK to set your current settings in the selected profile, **Save** to keep your changes, and close the **Options** window.
- Selecting **Cancel** closes the window without accepting the current settings.
- Selecting **Help** brings up a help window with help on the currently selected folder tab.

Communications Tab

Select the Communications Tab to display the window that lets you set up or change the options for connecting to a remote host computer (please see the previous graphic).

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

Network Connection Settings

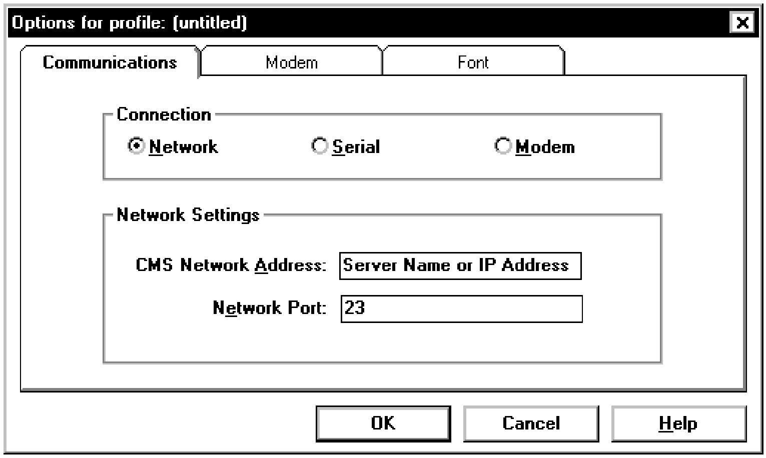
Select **Network** if you are connecting to the remote CMS through a network.

The information required for this setting follows:

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

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

An example of standard settings for a network connection is shown below:



Serial and Modem Connection Settings

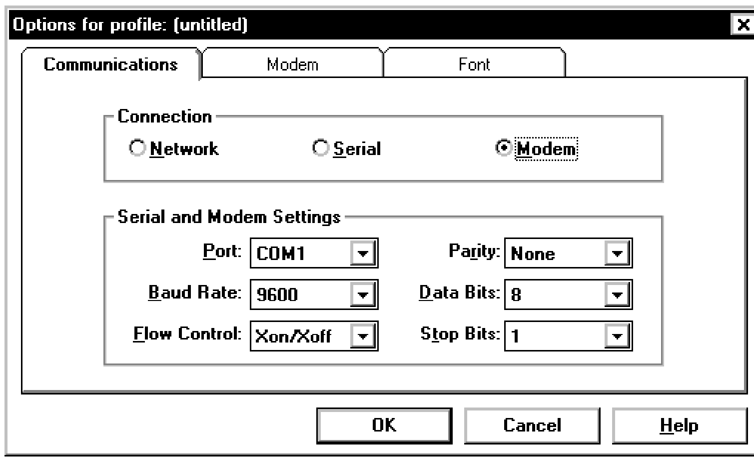
Select **Serial** if you are connecting to the remote CMS through a serial connection. Select **Modem** if you are connecting to the remote CMS through a modem.

The information required for each setting is as follows:

- **Port** — choose from the pull-down list the communication (COM) port you will use to connect to the CMS server. The options are COM1, COM2, COM3, and COM4.
- **Baud Rate** — choose the baud rate from the pull-down list. The options are 110, 300, 600, 1200, 2400, 4800, 9600, and 19.2K.
- **Flow Control** — choose the appropriate flow control from the pull-down list. The options are None, Xon / Xoff (software), Rts / Cts (hardware), or Both.
- **Parity** — choose the appropriate parity setting from the pull-down list. The options are None, Odd, Even, Mark, and Space.
- **Data Bits** — choose the number of data bits from the pull-down list. The options are 5, 6, 7, and 8.
- **Stop Bits** — displays the number of stop bits from the pull-down list. The options are 1, 1.5, and 2.

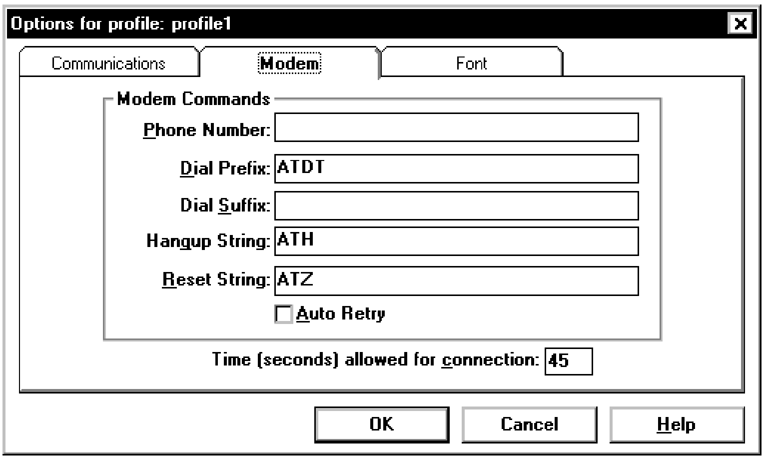
Warning Do not change these settings unless you are instructed to do so by your Network Administrator.

An example of standard settings for a serial or modem connection is shown below:



Modem Tab

Select the **Modem** tab to set up or change dial strings for connecting to the remote CMS through a modem port. The following paragraphs describe the options available to you for setting up the modem connection. Below is an example of standard modem settings for Terminal:

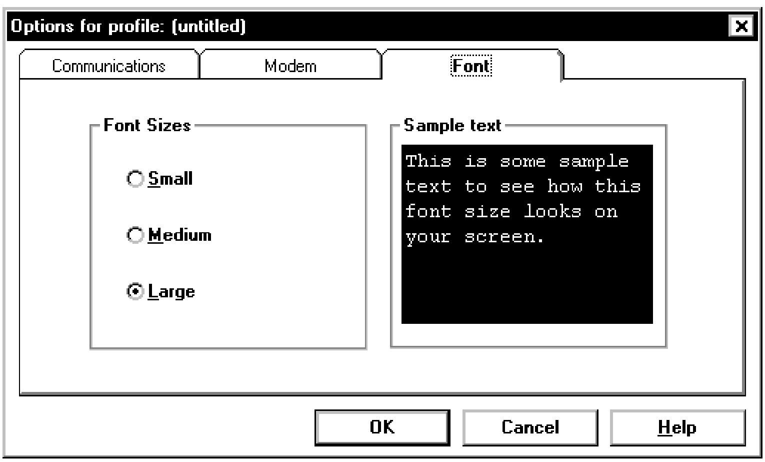


- **Phone Number** — enter the phone number of the remote host.
- **Dial Prefix** — enter the characters to send to the modem **before** the Phone Number of the remote host. For example, if a "9" must be dialed before the telephone number, you can enter it after the phrase ATDT (ATDT9).
- **Dial Suffix** — enter the characters to send to the modem **after** the Phone Number of the remote host. For example, if an extension has to be dialed after the telephone number of the remote host, enter it here.
- **Hangup String** — enter the characters to send to the modem to cause it to hang up the connection. The default is ATH.
- **Reset String** — enter the characters to send to the modem to cause it to reset itself. The default is ATZ.

- **Auto Retry** — turns the auto retry option on or off. If the check box is not selected, the modem tries only once to establish a connection to the remote host.
- **Allow xx seconds for connection** — enter the maximum time to wait for the connection to be established. The valid values are 1 to 999 seconds. The default value is 45 seconds.

Font Tab

Select the **Font** tab to change the font size used by the Terminal when you are using CMS. The following paragraphs describe the options available to you for setting the font size. Below is an illustration of the standard font settings for Terminal:



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

Chapter 18

Terminal Messages

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

- Error Messages
- Information Messages.

Error Messages

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

Unable to connect to the remote host.

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

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

The connection to the remote host was lost.

Some possible causes for this message are:

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

The profile {name} does not exist.

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

Information Messages

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

The profile {name} exists, replace?

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

Save changes to {name}?

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

A connection is active, exit anyway?

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

19

Error Messages

Introduction

This chapter describes the kinds of error messages that Supervisor displays and tells you what to do when error messages appear.

The chapter is organized in two sections. The first section lists the types of error messages Supervisor might display (for each type of error message, three examples and a set of instructions are given). The second section lists error messages that do not fit into the categories of the first section.

If an error message displays, and the message is not described in this chapter, then the error is considered “unexpected”. When an unexpected error occurs, be sure to record all information appearing in the error message box, and call Services on 1-800-242-2121. (Customers outside the United States should call their Lucent Technologies Representative or Distributor.)

A typical Supervisor error message will contain the following information:

- A general description of the error
- The error code and specific error associated with the problem
- The location information for the error.

Types of Error Messages

The following table lists the major types of error messages that Supervisor might display. Three examples, as well as general instructions, are given for each type of error message

Type of Message/Examples	What to Do?
Login Errors	Use any information in the error message to find and correct the problem. If you cannot correct the problem yourself, then see your system administrator or call Services.
The server did not recognize your Login ID and / or Password. Please try again later.	
The server did not respond to the login request. Try again?	
Your UNIX shell is not set to usr / bin / cms, so Automatic Login will not work properly. Please select Manual Login in the Options dialog box and try again.	
Invalid User Input	Reenter the input in the field. If applicable, you can also use the Browse button or the History list to select valid input for the field.
Invalid Date	
‘<user-entered value>’ is not a valid entry for this field.	
A single value must be entered in this field. Ranges and lists are not allowed.	

Type of Message/Examples	What to Do?
Failed Operations	Use any information in the error message to find and correct the problem. If you cannot correct the problem yourself, then see your system administrator or call Services.
Cannot perform the requested operation because the Server message queue is full. Try again.	
Cannot perform the requested operation because of an internal Logic Error.	
Cannot perform requested operation. Please try again or contact Technical Support.	
Communications Errors	Use any information in the error message to find and correct the problem. If you cannot correct the problem yourself, then see your system administrator or call Services.
Could not communicate with the modem.	
Could not connect to the server.	
Could not initialize communications.	
Permissions Errors	Contact your system administrator to request the read or write permission that you need.
Cannot perform requested operation because you do not have read or write permission in any split or skill.	
You do not have permission to write into this table.	
You do not have permission for any ACD.	

Type of Message/Examples	What to Do?
File System Errors	If you cannot correct the problem in the file or file system, then see your system administrator or call Services.
Could not find the file DALE.DLL. Please make sure that this file is on your workstation's path.	
The application could not be started because the path to the executable was not found. Please reinstall Lucent Technologies *CentreVu* Supervisor or call Technical Support.	
The file <filename> is not a valid bitmap file. Please try again with another file.	
CMS Server Errors	If appropriate, wait and try your request again later. If you cannot wait, see your system administrator or call Services.
The data requested is not present on the server. Please contact a system administrator.	
The server is currently in single-user mode. Please login again later.	
The server is not currently running. Please try again later.	

<table>
<tr><th>Type of Message/Examples</th><th>What to Do?</th></tr>
<tr><td>Report Errors</td><td rowspan="4">Report errors can occur for any of the following reasons:
Syntax error in report
Chart does not contain any series
Report is not a Supervisor report
Input control is invalid
Input control is not found
Report object references a non-existent query
Query has errors.
Check the error log for more details. For additional information on reports, see the Reports Basics and / or Reports chapters in this document. If you cannot correct the problem yourself, then see your system administrator or call Services.</td></tr>
<tr><td>Reports must be started from the controller.</td></tr>
<tr><td>Report is too wide for Portrait mode but can be printed in Landscape mode. Do you want to print this report in Landscape mode?</td></tr>
<tr><td>The report cannot run because a problem was detected in the structure of the report.</td></tr>
<tr><td></td><td></td></tr>
<tr><td>Memory/Disk Space Error</td><td rowspan="4">Use any information in the error message to find and correct the problem. If you cannot correct the problem yourself, then see your system administrator or call Services.</td></tr>
<tr><td>The disk is full.</td></tr>
<tr><td>The application could not be started because system memory is low. Please close some applications and try again.</td></tr>
<tr><td>The system is low on disk space. Please delete any unused files.</td></tr>
</table>

List of Messages

The following table lists (in alphabetical order) many user error messages that Supervisor might display.

Message	Description/What to Do?
<count> records exported to <filename or clipboard>	*Reason* — This message indicates how many records of data were exported after a successful data export operation. *What to Do?* — Select **OK**.
A Change Agent Skills window already exists. Do you wish to close it and start a new one?	*Reason* — This message may appear when launching a “Multi-Agent Skill Change” window from the controller. Only one window of this type may be active at any one time. *What to Do?* — Select **No** to make the Multi-Agent Skill Change window active, or select **Yes** to open a new one and close existing window.
A Change Agent Split Assignments window already exists. Do you wish to close it and start a new one?	*Reason* — This message may appear when launching a “Change Agent Split Assignments” window from the controller. Only one window of this type may be active at any one time. *What to Do?* — Select **No** to make the Change Agent Split Assignments window active, or select **Yes** to open a new one and close existing window.
A data export is in progress. Logging off will cause the data to be discarded. Do you really want to log off?	*Reason* — You attempted to log off the CMS server while report data transport was in progress. *What to Do?* — Select **Yes** to log off, or select **No** to cancel the log off command.

Message	Description/What to Do?
An internal error has occurred, and Lucent *CentreVu* Supervisor must exit. Please close all applications and restart *Windows*.	*Reason* — A fatal error has occurred in the application. *What to Do?* — Close all applications and restart *Windows*.
An internal failure occurred in attempting to display the window for task <form caption>. This task is being terminated, contact Technical Support.	*Reason* — Supervisor was unable to create the window you selected. The task will not be displayed. *What to Do?* — See the error log, which may have more information.
Are you sure you want to logout?	*Reason* — This is displayed when the user chooses to log out via the Controller when there is a session active to a server. *What to Do?* — Select **Yes** to log out, or select **No** to cancel the logout command.
CENTREVU.INI could not be created.	*Reason* — You may be out of hard drive space. *What to Do?* — Delete any unnecessary files and try again.
CMS windows must be started from the Controller.	*Reason* — User tried to open a CMS window from a place other than the Controller (for example, double clicking on form.exe in file manager). *What to Do?* — Use the Supervisor Controller to open the window.
Extension is not assigned to any splits.	*Reason* — When a user launches the “Change Extension Split Assignments” window from the Controller, an input box is displayed which allows the user to enter an extension. If the extension entered is not assigned to any splits, this message is displayed. *What to Do?* — Enter a valid extension number.

Message	Description/What to Do?
Operation successful.	*Reason* — The operation initiated by the user has completed successfully. *What to Do?* — Select OK to continue.
Please specify a network address in the Options dialog.	*Reason* — There is no network address specified in the Options window. *What to Do?* — Specify a network address. See your system administrator if you do not know the network address for the server.
Please specify a network port in the Options dialog.	*Reason* — There is no network port specified in the Options window. *What to Do?* — Specify a network port. The network port is typically 23. This value should not change. For more information on the network port, see your system administrator.
Please specify a phone number in the Options dialog.	*Reason* — There is no modem phone number specified in the Options window. *What to Do?* — Specify a phone number. See your system administrator if you do not know the phone number for the server.
Reports must be started from the Controller.	*Reason* — The user tried to run RENGINE.EXX from a place other than the controller (for example, double-clicking the file's icon in *Windows* Explorer or File Manager). *What to Do?* — Use the Supervisor Controller to open the window

Message	Description/What to Do?
Skill cannot be removed from this agent because a failure in communications prevents permission validation.	*Reason* — This message could appear in the Change Agent Skills window when the user attempts to remove a skill from an agent. The message indicates a problem in communications with the server. *What to Do?* — See your system administrator or call Services.
The application could not be started because the executable file is corrupt. Please reinstall Lucent *CentreVu* Supervisor or call Technical Support.	*Reason* — A supervisor executable file is corrupt. *What to Do?* — Reinstall Supervisor. See the *CentreVu Supervisor Installation and Getting Started Guide* for instructions. If reinstalling Supervisor does not solve the problem, then call Technical Support.
The application could not be started because the path to the executable was not found. Please reinstall Lucent *CentreVu* Supervisor or call Technical Support.	*Reason* — When you selected the Supervisor icon, the path associated with the icon was incorrect. *What to Do?* — Reinstall Supervisor or call Services.
The device is not available. Correct the problem and try again.	*Reason* — This usually occurs when trying to export data to a floppy or network drive that is not currently accessible. *What to Do?* — Check to see if the floppy disk is inserted or the network drive is connected.
The device is not ready. Correct the problem and try again.	*Reason* — This usually occurs when trying to export data to a floppy or network drive that is not currently accessible. *What to Do?* — Check to see if the device is ready.

Message	Description/What to Do?
The following file systems are low, and could adversely affect server performance: <filesystems>	*Reason* — This is displayed at login if any CMS file systems are low on space. Below this message is a list of the file systems and their percentages. *What to Do?* — See your system administrator or call Services.
The maximum length for the input field has been met, <entered name or range> is the last <entity> that can be added. Remove items from the Selected list.	*Reason* — In one of the multi-value browse windows, the user has selected so many items that the information will not fit in the input field. *What to Do?* — Remove all entities after the last one that can be added, which is indicated in the error message.
The maximum number of Lucent *CentreVu* Supervisor logins on the server has been reached. Please try again later.	*Reason* — The limit on the number of users that have been authorized to use Supervisor has been met. Users who attempt to log in will be denied login until the number of Supervisor users falls below the authorized number. *What to Do?* — Try again later or see your system administrator to request a greater maximum number of Supervisor logins.
The network connection to '<user-entered server name>‘ timed out.	*Reason* — Supervisor could not connect to the specified server. *What to Do?* — Try again or see your system administrator.
The operation could not be completed because the connection to the server is down.	*Reason* — Supervisor tried to communicate with the server to process a user request, update a report, or perform some other operation, and was unable to complete the transaction because the connection to the server was not active. *What to Do?* — Reconnect to the server or see your system administrator.

Message	Description/What to Do?
The operation was cancelled because it took too long to complete.	*Reason* — Supervisor was retrieving data from the CMS server. The retrieval took longer than expected, so Supervisor cancelled out of the retrieval. *What to Do?* —Try again or call Services.
The requested report could not be run. Please try again or call Technical Support.	*Reason* — Supervisor could not execute the report you selected. *What to Do?* —Try again or call Services.
The requested window could not be opened. Please try again or call Technical Support.	*Reason* — Supervisor could not open the window you selected. *What to Do?* —Try again or call Services.
There are no agents in this skill.	*Reason* — This message may appear in the Multi-Agent Skill Change window when a user double clicks on a skill name to see the members of that skill and there are none. *What to Do?* — Select OK and enter another skill name in the input field.
There are no extensions in this split.	*Reason* — This message may appear in the Move Extensions Between Splits window when a user double clicks on a split name to see the members of that split and there are none. *What to Do?* — Select OK and enter another split name in the input field.
There was an unknown failure on the server.	*Reason* — The server shut down. *What to Do?* — See your system administrator.
This button has already been placed on the toolbar.	*Reason* — You attempted to move a button onto the toolbar that is already assigned to the toolbar. *What to Do?* — Select OK.

Message	Description/What to Do?
This report contains character-style graphics that are not supported by *CentreVu* Supervisor. The graphics will be displayed as text.	*Reason* — CMS “graph” reports are not supported by Supervisor. The report will still be run, but the output will be displayed irregularly. *What to Do?* — Use one of the Supervisor graphical reports instead or create an equivalent report using Report Designer.
This request may modify or delete multiple entries in the database. Do you want to continue?	*Reason* — You have made a change in the Dictionary that will affect more than one item in the CMS database. *What to Do?* — Select Yes if you want to continue or select No to cancel the command.
Threshold configuration file <filename> contains invalid data. Threshold highlights on real-time reports may be incorrect.	*Reason* — The threshold settings file was corrupt. Invalid entries are ignored. *What to Do?* — Re-create threshold settings or call Services.
Threshold file format is invalid.	*Reason* — The threshold settings file was corrupt. *What to Do?* — Re-create threshold settings or call Services. If this message recurs, delete the threshold settings file. For information on deleting the threshold settings file, call Services.
Threshold values must increase from lower numbers to higher numbers.	*Reason* — When setting threshold highlight numbers, the number for low caution must be the smallest. The number for high warning must be the largest. *What to Do?* — Re-create threshold settings.

Message	Description/What to Do?
Thresholds are not available for the selected data item.	*Reason* — This message indicates that the threshold menu item was enabled erroneously. You cannot set thresholds for this item. *What to Do?* — See your system administrator or call Services if the selected data item is one for which you are allowed to set thresholds.
Unable to communicate with the Server. Terminating task	*Reason* — Supervisor attempted to send a message to the server and it failed. *What to Do?* — See your system administrator.
Unable to initialize the application.	*Reason* — Supervisor could not find the information it needed to start the application. *What to Do?* — See your system administrator or call Services.
Unable to initialize the Reports application. To correct the problem, try closing *CentreVu* Supervisor and restarting Windows. If this problem persists, contact Technical Support.	*Reason* — There are several causes for this error. *What to Do?* — See your system administrator or call Services.
Unable to start <CMS Form/Operation name> because someone else is already running it. Only one can be running on the server at a time.	*Reason* — This message is displayed for CMS tasks where only one task can be running on the system at a time (for example, Backup, Restore, Data Storage Allocation), or when a user tries to start another task. *What to Do?* — Try again later.

Message	Description/What to Do?
Unable to start the ACD Administration application.	*Reason* — This usually means a shortage of DOS conventional memory. *What to Do?* — Consult your *Windows* documentation for assistance in optimizing your conventional memory, or see your system administrator.
Warning: The server will shut down in one minute. Please exit at this time.	*Reason* — The CMS server will shut down. *What to Do?* — Log out.
You are currently logged in. Are you sure you want to exit?	*Reason* — This is displayed when the user closes the Controller when there is a session active to a server. *What to Do?* — Select Yes to exit (Supervisor will automatically log you out), or select No to cancel the command.
You are not recognized as a valid server user. Please contact your system administrator.	*Reason* — The login used to log into the server is not administered on the server. *What to Do?* — See your system administrator.
Your new password must differ from the old by at least three character positions.	*Reason* — You are changing your password and did not enter one that is sufficiently different from the expired password. *What to Do?* — Enter a valid new password.
Your password may not be the same as or similar to your login ID.	*Reason* — For security purposes, your password must be sufficiently different from your Login ID. *What to Do?* —Select OK to continue.
Your password must be at least six characters in length.	*Reason* — You are changing your password and entered a new password that is not long enough. *What to Do?* — Enter a valid password.

Message	Description/What to Do?
Your password must contain at least two alphabetic characters, and at least one numeric or special character.	*Reason* — You are changing your password and entered a new password that does not have the correct type/number of characters. *What to Do?* — Enter a valid password.
Your UNIX shell is not set to /usr/bin/cms, so Automatic Login will not work properly. Please select Manual Login in the Options window and try again.	*Reason* — CMS, CMSSVC and logins where the user gets a shell prompt when they log into the server will receive this message when they try to log in via the automatic login. *What to Do?* — Open the Options dialog box and select Manual Login, then try again. For more information on manual login procedures, see Chapter 4, "Getting Started," in the *CentreVu Supervisor Installation and Getting Started* guide.
Your user configuration could not be loaded. The default configuration will be used.	*Reason* — Supervisor could not load your configuration settings. *What to Do?* — Select OK to continue.

IN

Index

B

D

E

F

Index

L

M

Index

N

O

Index

Index

T

U

V

W