

# **Avaya Call Management System**

Release 12 Administration

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#### Preventing toll fraud

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

#### Avaya fraud intervention

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

#### http://www.avaya.com/support

#### Providing telecommunications security

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

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

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

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

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

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

### Your responsibility for your company's telecommunications security

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

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

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

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

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#### Compas

This document is also available from the Compas database. The Compas ID for this document is 102539.

#### Avaya support

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

http://www.avaya.com/support

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# Preface

Avaya Call Management System (CMS) is an application for businesses and organizations that use Avaya communication servers to process large volumes of telephone calls using the Automatic Call Distribution (ACD) feature. Avaya CMS supports solutions for routing and agent selection, multi-site contact centers, remote agents, reporting, interfaces to other systems, workforce management, desktop applications, system recovery, and quality monitoring.

Avaya CMS is part of the Operational Effectiveness solution of the Avaya Customer Interaction Suite.

This section includes the following topics:

- Purpose on page 18
- Intended users on page 18
- Overview on page 18
- <u>Conventions and terminology</u> on page 20
- Reasons for reissue on page 20
- Availability on page 21
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- Support on page 26

# Purpose

The purpose of this document is to provide instructions on administering a contact center through *Avaya CMS Supervisor*.

This information product specifically addresses the functionality of CMS.

# **Intended users**

This document is written for:

- Avaya Call Management System (CMS) administrators who have access to all parts of CMS
- Split/Skill supervisors with limited access to CMS

# **Overview**

This document includes the following topics:

• Chapter 1: Introduction on page 27

Provides an overview of this document, password information, and cross-references for *Avaya CMS Supervisor* usage

Chapter 2: Configuring Avaya CMS Supervisor on page 39

Describes the Supervisor configuration options

<u>Chapter 3: Using the Dictionary to name contact center entities</u> on page 51

Describes how to create synonyms in the Dictionary

• Chapter 4: Using reports on page 193

Describes the basic use of the Reports subsystem

<u>Chapter 5: Scripting CMS operations</u> on page 203

Describes how to script common actions

<u>Chapter 6: Administering contact center agents</u> on page 219

Describes how to change agent splits/skills, create agent templates, move extensions between splits, and use agent trace

Chapter 7: Administering the contact center configuration on page 247

Describes how to add or delete call work codes and split/skill call profiles, change VDN skill preferences, view trunk group assignments, change VDN call profiles, and other contact center activities

Chapter 8: Administering exceptions on page 305

Describes how to define exceptions and run exception reports for agents, split/skills, trunk groups, VDNs, and vectors

Chapter 9: Administering user permissions on page 379

Describes how to create users and define, change, or modify associated *CMS* permissions

Chapter 10: Configuring CMS system settings on page 461

Describes how to change the state of *CMS*, allocate storage space, specify storage intervals, and other system setup activities

Chapter 11: Maintaining CMS on page 523

Describes backups, restores, backup strategies, maintenance reports, backup volumes, and labeling

<u>Chapter 12: Using Solaris</u> on page 611

Describes the Sun Microsystems, Inc. Solaris operating system and how to use it with *CMS* 

Chapter 13: Using timetables and shortcuts on page 619

Describes how to use timetables and shortcuts to streamline activities

# **Conventions and terminology**

If you see any of the following safety labels in this document, take careful note of the information presented.

## **A** CAUTION:

Caution statements call attention to situations that can result in harm to software, loss of data, or an interruption in service.

### **WARNING**:

Warning statements call attention to situations that can result in harm to hardware or equipment.

### **DANGER**:

Danger statements call attention to situations that can result in harm to personnel.

### A SECURITY ALERT:

Security alert statements call attention to situations that can increase the potential for unauthorized use of a telecommunications system.

### Terminology

A Communication Manager may be referred to as "switch". Unless otherwise noted, the term Communication Manager includes Release 12 and later communication servers.

# **Reasons for reissue**

This is the first issue of this document.

# **Availability**

Copies of this document are available from one or both of the following sources:

### Note:

Although there is no charge to download documents through the Avaya Web site, documents ordered from the Avaya Publications Center must be purchased.

- The Avaya online support Web site, http://www.avayadocs.com
- The Avaya Publications Center, which you can contact by:

### Voice:

- +1-207-866-6701
- +1-800-457-1764 (Toll-free, U.S. and Canada only)

### Fax:

+1-207-626-7269 +1-800-457-1764 (Toll-free, U.S. and Canada only)

### Mail:

GlobalWare Solutions 200 Ward Hill Avenue Haverhill, MA 01835 USA Attention: Avaya Account Manager

### E-mail:

totalware@gwsmail.com

# **Related documentation**

You might find the following Avaya CMS documentation useful. This section includes the following topics:

- Change description on page 22
- Software documents on page 22
- <u>Administration documents</u> on page 23
- <u>Avaya CMS upgrade documents</u> on page 23
- Hardware documents on page 24
- <u>Communication Manager documents</u> on page 25
- Documentation Web sites on page 25

## **Change description**

For information about the changes made in Avaya CMS R12, see:

• Avaya Call Center 2.1 and CMS Release 12 Change Description, 07-300197

## Software documents

For more information about Avaya CMS software, see:

- Avaya Call Management System Release 12 Software Installation, Maintenance, and Troubleshooting Guide, 585-215-117
- Avaya CMS Open Database Connectivity, 585-780-701
- Avaya Call Management System Release 12 LAN Backup User Guide, 585-215-721
- Avaya Call Management System Release 12 External Call History Interface, 07-300064
- Avaya CMS Custom Reports, 585-215-822
- Avaya CMS Forecast, 585-215-825
- Avaya Visual Vectors Release 12 Installation and Getting Started, 07-300069
- Avaya Visual Vectors Release 12 User Guide, 07-300200
- Avaya Business Advocate Release 12 User Guide, 07-300063
- Avaya CMS Release 12 Report Designer User Guide, 07-300068

## Administration documents

For more information about Avaya CMS administration, see:

- Avaya Call Management System Release 12 Administration, 07-300062
- Avaya Call Management System Database Items and Calculations, 07-300011
- Avaya CMS Supervisor Release 12 Reports, 07-300012
- Avaya CMS Supervisor Release 12 Installation and Getting Started, 07-300009
- Avaya Call Management System High Availability User Guide, 07-300065
- Avaya Call Management System High Availability Connectivity, Upgrade and Administration, 07-300065

### Avaya CMS upgrade documents

There are several upgrade paths supported with Avaya CMS. There is a document designed to support each upgrade. None of the following upgrade documents are available from the publications center.

This section includes the following topics:

- Base load upgrades on page 23
- Platform upgrades and data migration on page 23
- Avaya Call Management System Upgrade Express (CUE) on page 24

### **Base load upgrades**

Use a base load upgrade when upgrading CMS to the latest load of the same version (for example, R3V9 ak.g to R3V9 al.k). A specific set of instructions is written for the upgrade and is shipped to the customer site with the CMS software CD-ROM as part of a Quality Protection Plan Change Notice (QPPCN).

For more information about base load upgrades, see:

• Avaya CMS R12 Base Load Upgrades

### Platform upgrades and data migration

Use a platform upgrade when upgrading to a new hardware platform (for example, upgrading from a SPARCserver 5 to a Sun Blade 150). The new hardware platform is shipped from the Avaya factory with the latest CMS load. Therefore, as part of the upgrade you will have the latest CMS load (for example, R3V9 to R12 or the latest load of the same

#### Preface

CMS version). For R12, a specific set of instructions is written for the upgrade and is shipped to the customer site with the new hardware.

For more information about platform upgrades and data migration, see:

• Avaya Call Management System Release 12 Platform Upgrade and Data Migration, 07-300067

### Avaya Call Management System Upgrade Express (CUE)

Use CUE in the following conditions:

- CMS is being upgraded from an earlier version (for example R3V6) to the latest version (for example, R12).
- The hardware platform is not changing.

A specific set of upgrade instructions is written for the upgrade and is shipped to the customer site with the CUE kit.

For more information about CUE upgrades, see:

- Avaya Call Management System (CMS) Release 12 CMS Upgrade Express (CUE) Customer Requirements, 07-300010
- Avaya Call Management System Release 12 Sun Blade 100 Workstation CMS Upgrade Express
- Avaya Call Management System Release 12 Sun Blade 100 Workstation Mirrored System CMS Upgrade Express
- Avaya Call Management System Release 12 Sun Enterprise 3500 Computer CMS
   Upgrade Express
- Avaya Call Management System Release 12 Sun Enterprise 3500 Computer Mirrored System CMS Upgrade Express
- Avaya Call Management System Release 12 Sun Fire V880 Computer CMS Upgrade Express

### Hardware documents

For more information about Avaya CMS hardware, see:

- Avaya Call Management System Sun Fire V880 Computer Hardware Installation, Maintenance, and Troubleshooting, 585-215-116
- Avaya Call Management System Sun Fire V880 Computer Connectivity Diagram, 585-215-612
- Avaya Call Management System Sun Blade 100/150 Computer Hardware Installation, Maintenance, and Troubleshooting, 585-310-783

- Call Management System Sun Blade 100/150 Computer Connectivity Diagram, 585-310-782
- Avaya Call Management System Sun Enterprise 3500 Computer Hardware Installation, Maintenance, and Troubleshooting, 585-215-873
- Call Management System Sun Enterprise 3500 Computer Connectivity Diagram, 585-215-877
- Avaya Call Management System Terminals, Printers, and Modems, 585-215-874

### **Communication Manager documents**

For more information about Avaya CMS communication servers, see:

- Avaya Call Management System Switch Connections, Administration, and Troubleshooting, 585-215-876
- Avaya Communication Manager Call Center Software Call Vectoring and Expert Agent Selection (EAS) Guide, 07-300186
- Avaya Communication Manager Call Center Software Automatic Call Distribution (ACD) Guide, 07-300185
- Avaya Communication Manager Call Center Software Basic Call Management System (BCMS) Operations, 07-300061

## **Documentation Web sites**

For product documentation for all Avaya products and related documentation, go to <u>http://www.avayadocs.com</u>. Additional information about new software or hardware updates will be contained in future issues of this book. New issues of this book will be placed on the Web site when available.

Use the following Web sites to view related support documentation:

• Information about Avaya products and service

http://www.avaya.com

• Sun hardware documentation

http://docs.sun.com

Okidata printer documentation

http://www.okidata.com

 Informix documentation http://www.informix.com  Tivoli Storage Manager documentation http://www.tivoli.com

# Support

### **Contacting Avaya technical support**

Avaya provides support telephone numbers for you to report problems or ask questions about your product.

For United States support:

1-800-242-2121

For international support:

See the <u>1-800 Support Directory</u> listings on the Avaya Web site.

### Escalating a technical support issue

Avaya Global Services Escalation Management provides the means to escalate urgent service issues. For more information, see the <u>Escalation Management</u> listings on the Avaya Web site.

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# **Chapter 1: Introduction**

This section provides introductory information on *Avaya CMS Supervisor* and complementary products. Basic information regarding the interfaces and usage of *Supervisor* can be found in the Avaya CMS Supervisor Installation and Getting Started document.

This section contains the following topics:

- What is Avaya CMS? on page 27
- Optional features on page 35

## What is Avaya CMS?

*Avaya CMS* is a software product for businesses and organizations that have an Avaya Communication Manager system and receive a large volume of telephone calls that are processed through the Automatic Call Distribution (ACD) feature. *Avaya CMS* collects call-traffic data, formats management reports, and provides an administrative interface to the ACD feature on the Communication Manager system.

A *CMS* administrator accesses the *CMS* database, generates reports, administers ACD parameters, and monitors call activities to determine the most efficient service for the calling customers.

This section includes the following topics:

- Operating system on page 27
- How Avaya CMS stores ACD data on page 28
- <u>ACD Administration</u> on page 32
- How Avaya CMS tracks ACD data on page 33

### **Operating system**

Avaya CMS resides on the Sun Microsystems, Inc. Solaris operating system and uses several Solaris system utilities to communicate with terminals and printers, to log errors,

and to execute processes. *CMS* utilizes the Informix Software, Inc. INFORMIX database management system, which provides an interface to the *CMS* historical database.

## How Avaya CMS stores ACD data

There are two ways to describe how Avaya Call Management System (CMS) stores ACD data:

- Logically How the CMS system organizes data for processing
- Physically How the CMS system mechanically stores the data on the disk drive

This section includes the following topics:

- How Avaya CMS logically stores ACD data on page 28
- How Avaya CMS physically stores ACD data on page 31

### How Avaya CMS logically stores ACD data

The logical storage of the ACD data has more impact on the CMS user than does the physical storage. The logical data storage controls how a CMS user is able to access and manipulate ACD data. CMS stores all of the ACD data received from the switch in the real-time and historical databases.

### **Real-time databases**

Real-time databases include tables for the current intrahour interval data and the previous intrahour interval data. The storage interval can be 15, 30, or 60 minutes.

### Historical databases

Historical databases include tables for the intrahour, daily, weekly, and monthly data. The following table shows all of the historical database tables and the maximum amount of time data can be stored in a particular table:

Historical database tables	Maximum time for data storage
Intrahour historical data	62 days
Daily historical data	5 years (1825 days)
Weekly historical data	10 years (520 weeks)
Monthly historical data	10 years (120 months)

Note:

You can use historical data to predict future call traffic and future agent and trunk requirements. For more information see *Avaya CMS Forecast*, 585-215-825.

### Data summarizing

When CMS collects data from the ACD, the data is stored in the real-time database for the current interval. At the end of the current interval, the following events occur:

- The data that was in current interval database table is archived to the previous interval database table.
- The data that was in previous interval database table is archived in the historical database as intrahour historical data.

The data remains in the historical database as intrahour historical data for a maximum of 62 days. At your designated data summarizing time, the intrahour historical data is summarized into daily historical data.

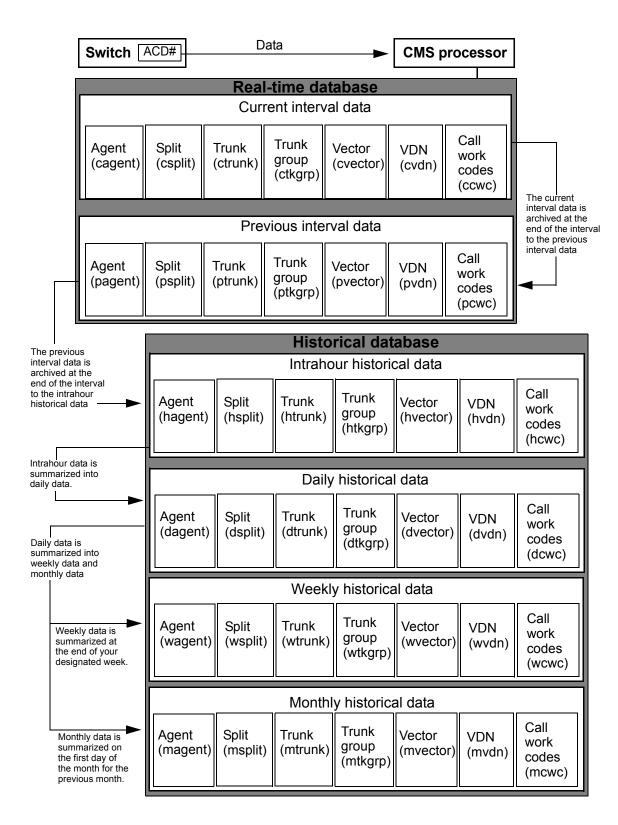
The daily historical data is summarized on a weekly and monthly basis. At the end of your designated week, the daily historical data is summarized into weekly historical data. On the first day of a new month, the daily historical data is summarized into monthly historical data for the previous month.

For more information, see <u>CMS data storage</u> on page 29.

### CMS data storage

The following figure shows how CMS stores data.

#### Introduction

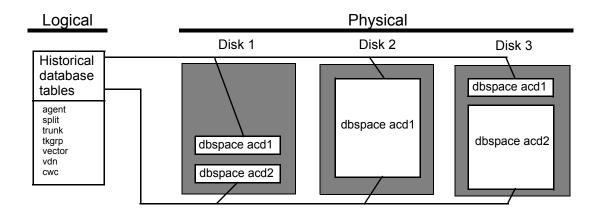


### How Avaya CMS physically stores ACD data

The relational database used by CMS R3V9 and later is Informix Dynamic Server (IDS). IDS manages the CMS data in specific dbspaces. The historical database can span multiple disks. Each ACD dbspace contains the CMS historical database table for a single ACD.

In the following example:

- The dbspace acd1 contains the historical database table for ACD 1
- The dbspace acd2 contains the historical database table for ACD 2



### Dbspace

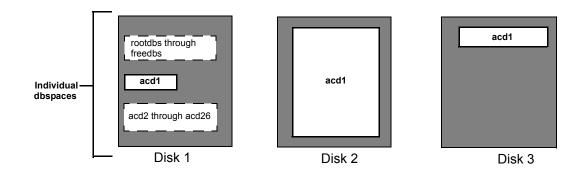
A dbspace is a logical unit that consists of one or more chunks. Dbspaces can exist across multiple disks. A CMS system contains the following dbspaces:

- rootdbs
- physdbs
- logdbs
- dbtemp
- aasdbs
- cmsdbs
- freedbs
- acd1 through acd26

### Important:

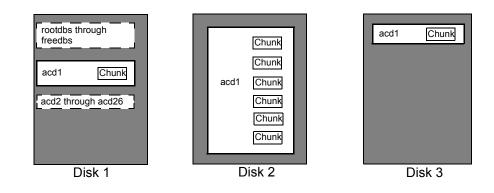
Do not attempt to alter rootdbs, physdbs, logdbs, dbtemp, aasdbs, or cmsdbs. Contact CMS services if you think you have a problem with any of these dbspaces.

In the following example, the dbspace acd1 exists across multiple disks.



### Chunks

A chunk is a unit of physical disk space used to store database data that is managed by IDS. Each chunk contains 256 MB of disk space. In the following example, the dbspace acd1 contains multiple chunks.



## **ACD Administration**

*CMS* provides an administrative interface to the switch. From the ACD interface, you can view or change parameters on the switch related to ACDs, Call Vectoring, and Expert Agent Selection (EAS). An administrator can also run reports that describe your contact center configuration.

For example, an administrator can:

- · Add or remove agents from splits or skills
- Move extensions between splits
- Change skill assignments

- Change trunk group-to-split
- Change trunk group-to-VDN
- Change VDN-to-vector assignments
- Start an agent trace
- List the agents being traced
- Create, copy, and edit call vectors

### How Avaya CMS tracks ACD data

CMS uses the data in the real-time and historical databases to generate standard reports that help you monitor your contact center's activities. Various agent, split/skill, trunk, trunk group, vector, and VDN activities are tracked at different points in the call process.

This section includes the following topics:

- How CMS tracks a call on page 33
- Events that start or stop data collection on page 34

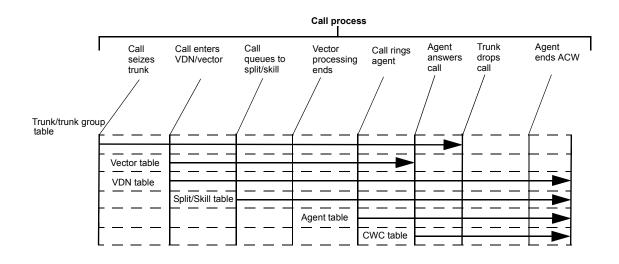
### How CMS tracks a call

The following diagram shows how CMS tracks a call from the time the call seizes a trunk until an agent ends after-call-work (ACW) activity.

The trunk table, trunk group table, vector table, VDN table, split/skill table, agent table, and call work code (CWC) table are CMS database tables that store call data. In the following diagram, the positions of the CMS database tables identify the points where CMS begins to collect call data. The arrowheads identify the points where data collection ends. The data is not recorded in the tables until the call and any ACW is complete.

#### Note:

With vectoring, the **stop** command stops the processing of vector commands.



### Events that start or stop data collection

Data collection starts or stops when one of these events occur:

- The Agent table starts collecting data on non-ACD calls when the agent answers or completes dialing.
- The Split/Skill table stops collecting data when:
  - The ACW for an ACD call ends
  - The call leaves the split queue and is forwarded to another destination (for example, intraflow)
  - The caller abandons the call
- The Vector table stops collecting data for the current vector when the call is:
  - Sent to an ACD agent
  - Connected to a station or trunk
  - Routed to a VDN or vector
  - Abandoned by the caller

#### Note:

Time in the vector stops but the vector tracks the call disposition to determine if the call was answered or abandoned.

- The VDN table stops collecting data for the current VDN when:
  - The ACW for an ACD call ends
  - The call is routed to a trunk or VDN
  - The call is transferred

- The caller abandons the call

# **Optional features**

This section lists features that can be purchased for use with Avaya CMS.

This section includes the following topics:

- Call Vectoring on page 35
- Expert Agent Selection on page 36
- Forecast on page 36
- Avaya Business Advocate on page 36
- ODBC on page 36
- Disk Mirroring on page 37

## **Call Vectoring**

Call vectors are user-defined, call-processing programs. The Call Vectoring feature enables you to create, copy, and edit call vectors on Communication Manager systems. Call vectors direct calls to specified on-network or off-network destinations, to queues in ACD splits, to call prompting, and digit collection. Calls can also be directed to treatments such as music, recorded announcements, forced disconnect, and forced busy.

On the Communication Manager system and *CMS*, Call Vectoring is a separately purchased feature; however, all Call Vectoring commands are described in this information product. A description of the **Vector Contents** window that is used to create, copy, and edit call vectors and the allowed values for all the vectoring commands can be found in the *Avaya Communication Manager Call Vectoring and Expert Agent Selection (EAS) Guide*. The **Vector Contents** window is only available through the ASCII interface of the *CMS* server.

Another separately purchased product, *Avaya Visual Vectors*, provides vector administration capabilities on Windows-based platforms.

See Avaya Visual Vectors Release 12 User Guide, 07-300070 for more information.

## **Expert Agent Selection**

Expert Agent Selection (EAS) is an optional Communication Manager system feature that routes incoming calls to the right agent on the first try. When you use the ACD queuing and the vector **Queue-to** and **Check** commands, a call is routed to an agent who has the skills to handle that call.

With EAS, call distribution is based on skill groups to which agents are assigned. If a caller's problem requires specific skills, EAS can route the call to an agent who is a member of the necessary skill group. Agents can be assigned to multiple skill groups.

The different Communication Manager systems have different EAS capabilities so you will need to plan ahead to add EAS. See <u>Chapter 6: Administering contact center agents</u> on page 219 and <u>Chapter 7: Administering the contact center configuration</u> on page 247 for more information on EAS.

If you do not have EAS, call distribution is based on splits.

### Forecast

Avaya CMS Forecast is an optional CMS feature. This product enables you to generate reports that predict both future call traffic and the resources that you will need to meet call-handling objectives. See the Avaya CMS Forecast document for more information.

## Avaya Business Advocate

Avaya Business Advocate is an optional switch feature that provides flexibility in the way a call is selected for an agent in a call-surplus situation. See *Avaya Business Advocate Release 12 User Guide*, 07-300063 for more information.

## ODBC

Open Database Connectivity (ODBC) is an optional *CMS* feature that enables you to access data in the *CMS* database for use in other software applications such as a spreadsheet program. With ODBC, you can access *CMS* data directly from your application.

## **Disk Mirroring**

Disk Mirroring is an optional feature of *CMS* that provides you with a completely redundant set of data, helping to ensure data security. It allows you to build a hard disk system containing multiple complete sets of data. Having such data redundancy greatly reduces the risk of data loss should a hard disk drive fail or your system crash.

#### Introduction

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# Chapter 2: Configuring Avaya CMS Supervisor

This section contains information regarding configuration of *Avaya CMS Supervisor* through the **Options** window.

The **Options** window allows you to adjust and control the following types of settings:

- The default ACD for all operations and reports windows
- Scripting defaults
- Colors used in Supervisor reports
- Formatting of the different types of fields displayed in Supervisor reports

This section contains the following topics:

- <u>Before you begin</u> on page 39
- General tab on page 40
- <u>Scripting tab</u> on page 41
- <u>Report Colors tab</u> on page 42
- <u>Creating a new report color scheme</u> on page 43
- <u>Threshold Colors tab</u> on page 46
- <u>Creating a new threshold color scheme</u> on page 47
- Name Format tab on page 49
- <u>Defining entity formats</u> on page 50

# Before you begin

Except for the **CMS Servers** tab, all other tabs of the **Options** window are only available after a successful login to a *CMS* server. The **CMS Servers** tab is disabled when logged in to a *CMS* server.

## **General tab**

Use the **General** tab to set your first calendar day, default ACD, and other interface usage options.

Options Report Colors	Threshold Color	rs ÌN	lame Format
MS Servers	General	Ścr	ipting
Set first calendar day,	default ACD, and other gen	eral options.	
First	Day of <u>W</u> eek: Sunday	•	
	Default ACD: st10	•	
<mark>⊡ S</mark> ync	chronize PC to CMS Time at	Login	
<b>⊠</b> se	Sound		
🔽 Use	<u>T</u> ooltips		
🔽 Disp	lay Taskbar <u>I</u> con		
Wind	low Menu Sort Order:		
۲	Start <u>O</u> rder		
0	Alphabetical		
Note: First Day of We Week day for Weekly	ek affects only calendar disp data collection.	blays; it does not cha	ange the CMS Start of
			Help
	ОК		

- First Day of Week This option affects only how the calendar is displayed. For example, if you browse for a date, the calendar starts the week based on the day that you choose. It does not change the *Start of Week* day for weekly data collection which is set through the **System Setup Storage Intervals** window.
- **Default ACD** Select the ACD that will be used as the default ACD for operations and reports windows. Note that an ACD Group can also be set as the default.
- Synchronize PC and CMS Time at Login Select this check box to change the internal clock of the PC to match the current time on the CMS server. This option does not affect the time on the CMS server.
- Use Sound Select this check box to receive an audible alert when the Exceptions Indicator box is updated. The Exceptions Indicator box is located on the Controller status bar. The sound that you hear is the sound that you chose for the exclamation event in Windows. Note that Threshold Highlighting does not use sound. It uses color only as an indicator of a threshold being met.
- Use Tooltips Select this check box to make tooltips visible for the controls in the *Supervisor* interface. For example, when you are working in the *Supervisor* Controller window, you can place your mouse cursor over a toolbar button and the system displays a yellow box that provides a brief description of that button.
- Use Taskbar Icon Select this check box to have Supervisor place an icon in the system tray.

- Window Menu Sort Order Use this option group to determine how items that are displayed in the menu for system tray icon are sorted:
  - **Start Order** Select this option to display the items in the system tray icon menu where the last item used appears at the top of the menu.
  - **Alphabetical** Select this option to display the items in the system tray icon menu in alphabetical order.

## Scripting tab

Use the **Scripting** tab to set the user ID used to run scripts, adjust the logging level, and set the file used for logging.

置 Options	Xa	<b>N</b> 111	×
Report Colors CMS Servers	) Threshold Colors General	Name Format	
- Automatic Scripts Dr User - Log File <u>P</u> ath: <u>S</u> ize:	D: Set Use Set Use C:\Program Files\Avaya\CMS St		
		<u></u>	
	ОК	Cancel	Apply

- User ID The login ID for a CMS user.
- Set User Button Select this button to open the Save as Script User Information dialog box.
- Logging Level This option group allows the following logging levels in configuring the amount of information that is recorded during the use of scripting:
  - **Minimum** The only activities that will be logged are errors and messages from *Supervisor* that would have been displayed to the window as if the user performed the scripted activity manually.
  - **Normal** All of the above activities are logged plus the start and stop time of each task of the script. The script name is also included.

- Maximum All of the above activities are logged plus additional information that may be useful for debugging a script. Any message that displays as the script runs is logged.
- Log File Path Enter the path and filename of the logfile in this field. You may also use the Browse button to the right of this field to select an existing file on the PC.
- Log File Size This field determines how large the script log file can get before it is begins replacing the oldest data. The field defaults to a value of 200KB.
- View Log Button Select this button to view the script log file.

## **Report Colors tab**

Use the **Report Colors** tab to set the colors that are used in your graphical reports.

CMS Servers Report Colors	) General Threshold Colors	) Scripting Name For	
Scheme: Rainbow		2ave As	<u>R</u> emove
Background:			
⊙ White C Automatic			
	ОК	Cancel	Apply

- Scheme This drop-down list box contains all of the existing color schemes available.
- Save As Selecting this button saves any changes made in the color bar window as a new scheme. See <u>Creating a new report color scheme</u> on page 43 for instructions on creating report color schemes.
- **Remove** Selecting this button deletes the currently displayed scheme.
- **Color window** This displays of 16 bars allows you to change the color and pattern of each bar by performing a right-click on that bar.
- Background There are two choices for the background color of reports:
  - White Select this option to display a white background for all reports.

- Automatic - Select this option to have the background of all reports use the color scheme configured through *Windows*.

# Creating a new report color scheme

To create a new color scheme for reports:

1. From the menu bar of the Controller window, select **Tools > Options**.

Supervisor displays the **Options** window.

- 2. Select the Report Colors tab.
- 3. From the **Scheme** drop-down list, select the color scheme you want to use as a basis for the new color scheme.

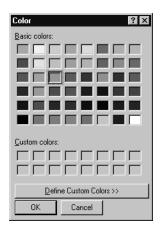
Supervisor displays the configuration of the scheme in the color bar window.

CMS Servers Report Colors	General Threshold Colors	Scriptin Name For	
Scheme: Rainbow	<b>•</b>	<u>S</u> ave As	<u>R</u> emove
	4 5 6 7 8 9 1		
Background: <u>     W</u> hite			
O <u>A</u> utomatic			
	OK	Cancel	Apply

- 4. From the **Background** options, select **White** or **Automatic**.
- 5. Click the color bar (1 through 16) that you want to modify.

6. If you want to modify the color, select the **Change Color** button and select the color through the **Color** dialog that is displayed.





7. If you want to modify the pattern, select the **Change Pattern** button and select the pattern from the resulting list.





8. Repeat Step 5 through Step 7 until you have updated all of the color bars that you want to modify.

9. When you are done modifying color bars, select the **Save As** button.

Supervisor displays the Save Scheme As window.

💼 Save Scheme As	? ×
What would you like to call the new scheme?	OK Cancel
New Rising Sun	

#### Note:

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.

- 10. Enter a name for this new color scheme in the text box.
- 11. Select **OK** to save this scheme.

To view the changes that you made to a color scheme at any point in the modification, select the **Apply** button. The current color scheme is then applied to any reports that are running.

# **Threshold Colors tab**

Use the **Threshold Colors** tab to set the colors that are used in reports to notify you when exceptions thresholds are reached.

CMS Servers Report Colors	General	) Scriptin Name For	
Scheme: Rainbow View/set colors for m	eport threshold indicators.	<u>S</u> ave As	<u>R</u> emove
Chart Caution Chart Insufficient Se Chart Warning Text Caution Text Insufficient Sa Text Warning Color: Pattem:	mple Size		
	ОК	Cancel	Apply

- Scheme This drop-down list box contains all of the existing color schemes available.
- Save As Selecting this button saves any changes made in the color bar window as a new scheme. See <u>Creating a new threshold color scheme</u> on page 47 for instructions on creating new color schemes.
- Remove Selecting this button deletes the currently displayed scheme.
- View/set colors for report threshold indicators This list box displays the states used for exception thresholds. A graphical representation of the selected state is displayed in the area to the right.
- **Color** Use the button to the right of this field to change the color for the selected exception threshold state.
- **Pattern** Use the button to the right of this field to change the graphical pattern applied for the selected exception threshold state.

# Creating a new threshold color scheme

To create a new threshold color scheme for reports:

1. From the menu bar of the Controller window, select **Tools > Options**.

Supervisor displays the **Options** window.

- 2. Select the Threshold Colors tab.
- 3. From the **Scheme** drop-down list, select the color scheme you want to use as a basis for the new color scheme.

Supervisor displays the view of the scheme.

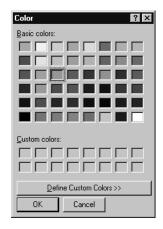
CMS Servers Report Colors	General	) Scripting Name For	
Scheme: Rising Sun New Rainbow View Pastels Primary (16-color Primary (16-color Primary (16-color Pasture Primary (16-color Paster) Ch Sunset Text Warning Color: Pattern		Save As	<u>Remove</u>
	OK	Cancel	

4. In the **View/set colors for report threshold indicators** list, select the item you want to change.

Supervisor displays the current setting for the selected item in the area to the right of the list box. The **Color:** and **Pattern:/Background:** fields display the respective settings for the current item.

5. If you want to change the color of the selected item, select the **Change Color** button at the right of the **Color:** field.

*Supervisor* displays the standard **Color** window from Windows allowing you to select the new color.



6. If you want to change the pattern/background color for the selected item, select the button at the right of the **Pattern:/Background:** field.

Depending on the item selected, *Supervisor* will display either the pattern list or the **Color** window which allows you to select a new pattern or background color.

- 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 the **Save As** button. *Supervisor* displays the **Save Scheme As** window:

💼 Save Scheme As	? X
What would you like to call the new scheme?	OK Cancel
New Rising Sun	

- 9. In the text box, enter a name for this new threshold color scheme you have just created.
- 10. Select the **OK** button to save this new color scheme.

To view the changes that you made to a color scheme at any point in the modification, select the **Apply** button. The current color scheme is then applied to any reports that are running.

# Name Format tab

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) are displayed in *Supervisor*. The display can be set to any one or a combination of {name} for Dictionary Name, {entity} for entity type, and {number} for entity number.

Choose or create a name format using {name} for entity name (as entered in the Dictionary), {entity} for entity type, and {number} for entity number. These formats determine how items are displayed in reports. For example, if you select the name format of {entity}{number}, all of the entities that can be named in the Dictionary are displayed as the entity type and number instead of the name defined in the Dictionary. If you selected {name} as the name format, the names that are assigned to the entities in the Dictionary are displayed.

Options CMS Servers	General		Script	
eport Colors	Threshold Col	ors	Name	Format
	e format or create your o			ary Name,
{entity} for enti	ty type, and (number) fo	r entity number		
E a thu				
Entity: ACD		Eormat:		
Agent Call Work Co	ode	{name}		-
Skill		, Example:		
Trunk Group VDN		DenverG3		
Vector				
				<u>H</u> elp

# **Defining entity formats**

To define the name format for an entity:

- 1. From the Entity field, select the item for which you want to change the format.
- 2. In the **Format** field, use one of the following methods to select a format for the specified entity type:
  - Manually enter the format that you want using the three possible types: {name}, {entity}, and/or {number}. It is not necessary to use a separator character between formats unless you want the separator to appear in the report.
     For example, if you want to display agent names and extension numbers on reports, enter {name} {number} in the Format box.
  - Use the drop-down list to choose from a set of preformatted options.

The **Example** field provides an example of what the format looks like based on your current definition.

If you entered a nonstandard name format, it is not saved in the Format list.

3. Select **OK** to save your changes.

#### . . . . .

# Chapter 3: Using the Dictionary to name contact center entities

This section provides information on procedures for using the Dictionary to administer names associated with contact center entities.

This section includes the following topics:

- About the Dictionary on page 52
- Before you begin on page 53
- <u>Dictionary rules</u> on page 53
- Searching the Dictionary on page 54
- <u>ACD Groups</u> on page 57
- <u>ACDs</u> on page 61
- Agent groups on page 66
- Agent string values on page 76
- Announcement names on page 81
- <u>AUX reason code names</u> on page 88
- <u>Calculations</u> on page 96
- <u>Call work codes</u> on page 104
- <u>Constants</u> on page 111
- Custom database items on page 118
- Generic string values synonyms on page 124
- Location IDs on page 127
- Login ID names on page 134
- Logout reason code names on page 141
- Split/skill string values on page 149
- <u>Split/Skill names</u> on page 154
- <u>Standard database items</u> on page 161
- Trunk group names on page 164

- Trunk string values on page 171
- VDN names on page 175
- Vector names on page 182
- Dictionary reports on page 189

# **About the Dictionary**

The Dictionary subsystem is used to assign synonyms or names to contact center entities. The following list gives a short sample of the items used in the Dictionary:

- Login IDs
- Splits/skills
- Call work codes
- ACDs
- AUX reason codes
- Logout reason codes
- Trunk groups
- VDNs
- Vectors

The Dictionary also allows users to work with items in the database such as:

- Viewing standard database items
- Viewing standard calculations
- Creating and administering custom calculations
- Creating and administering constants
- Creating and administering custom database items

The names assigned through the Dictionary appear on reports to help users understand them better. The Dictionary also makes it possible for users to create agent groups, change agent splits/skills, and change trunk string values for reporting purposes. The Dictionary also provides a global search function to find any item within it.

# Before you begin

If an ACD Group is selected as the current ACD in the **Dictionary** window, only those operations that are valid for the ACD Group will appear in the **Operations:** list.

## **Dictionary rules**

The following rules apply to the names assigned in the Dictionary:

- Dictionary names can have from 1 to 20 characters.
- Names (synonyms) must begin with an alphabetic character.
- Dictionary names can include the following characters:
  - Any alphanumeric character
  - Underscore (\_)
  - Blank ()
  - Comma (,)
  - Period (.)
  - Apostrophe (')
  - Plus sign (+)
- Blanks () are allowed in all Dictionary names except:
  - Calculation names
  - Constant names
- Names must be unique within each section of the Dictionary for an ACD.

For example, you can name trunk group 1 as *sales*, and split/skill 1 as *sales*, but you cannot name split/skill 1 as *sales* and split/skill 2 as *sales* on the same ACD.

Fields and entries made in the Dictionary are case-sensitive.

The following rules apply to the descriptions assigned in the Dictionary:

- Descriptions in the Dictionary can have from 1 to 50 characters.
- Descriptions can include all printable characters except:
  - Semicolon (;)
  - Backward slash (\)

- Grave accent (`)
- Tilde (~)
- Double quotes (")
- Pipe symbol (|)
- Asterisk (\*)
- Question mark (?)

# **Searching the Dictionary**

The Dictionary contains a global search feature that can be used to find a wide variety of information. Some examples of the types of information you can search for in the dictionary are:

- A login ID or a group of login IDs
- A split, skill, or trunk group
- ACD names
- Database items
- Calculations
- Agent names

### Permissions

To do a global search in the dictionary, you need *write* permissions for the Dictionary subsystem.

#### Steps

From the Controller Window, select Commands > Dictionary.
 Supervisor displays the Dictionary window.

Dictionary					×
Operations	Reports		)		
Operations:					
ACD Groups ACDs Agent Groups Agent String Values Announcements AUX Reason Codes					
Calculations Call Work Codes					•
ACD:				<b>T</b>	
Socipt				<u>H</u> elp	
		OK		Cancel	

2. In the **Operations:** list, highlight **Global Search**.

Supervisor displays the Dictionary Global Search Input window.

🏥 Dictionary	Global Search Input
<u>Actions</u> <u>E</u> dit	Help
₩ <u>3</u> 1	
Search for:	

#### Note:

Remember the following before entering search criteria:

- You can search on any pattern
- You can include an asterisk (\*) or question mark (?) in your pattern
- The search is case sensitive
- 3. In the Search for: field, enter the item name or pattern.

4. From the Actions menu, select Run.

Supervisor displays the Dictionary Global Search Results window.

🏥 Dictionary Global Search Results 🛛 📃 🗖				
<u>Actions</u> <u>E</u> dit <u>H</u> elp	)			_
Value matched	Field matched	In submenu	Name	
а	Database item	Custom Items	а	1
abc	Constant name	Constants	abc	
				1
				1
2 matches found				

Field	Contents
Value matched	Displays the matches for your pattern.
Field matched	Displays the name of the field in the Dictionary that corresponds to value matched.
In submenu	The Dictionary submenu where your search pattern was found.
Name	The name that corresponds to the value matched.

# **ACD Groups**

This section provides information for viewing ACD Groups in the Dictionary. ACD Groups and the corresponding members can only be viewed through the **Dictionary Operations** window. Administration of ACD Groups is done through the **Call Center Administration** subsystem. The capability of viewing ACD Groups through the **Dictionary** subsystem allows those individuals who only run reports in the contact center to view which ACDs are defined within each ACD Group. This capability can assist these individuals in determining which ACD Groups should be used when running reports.

#### Note:

For *CMS* R12, ACD Groups cannot be selected to display information through standard *CMS* reports. To run reports for ACD Groups, you will need to create custom reports through the *CMS* ASCII interface or have them created for you by contacting the Avaya Professional Services Organization.

This section contains the following topics:

- Before you begin on page 57
- Permissions on page 58
- Listing all ACD Groups on page 58
- <u>Viewing the contents of an ACD Group</u> on page 59

#### **Related topic**

For more information on ACD Groups and their usage, see ACD Groups on page 248.

### Before you begin

The following should be read and understood before working with ACD Groups in the Dictionary:

- If the ACD Groups feature has not been purchased, it will not appear in the **Dictionary** or **Call Center Administration** interfaces.
- If you add an ACD Group, you will need to log out of *Supervisor* and log back in to see this group as a choice in the appropriate dialogs.
- An ACD Group cannot serve as the CMS master ACD.
- Overlapping ACD Groups (groups having common member ACDs), could result in synonym conflict within the members of an ACD Group if poorly administered. Because of this capability, entity IDs in overlapping ACD Groups must be mutually exclusive.

- Entity synonyms must be unique for an ACD Group and across all of the ACDs that are members of the ACD Group.
- User permissions are administered separately for an ACD Group and its member ACDs.
- CMS real-time custom reports are only displayed if data collection is enabled and the ACD link status is 'up' for at least one member ACD in the specified ACD Group. An error message will be displayed if these conditions are not met.
- Custom reports that are created with the **Single ACD Only** option enabled cannot be run for an ACD Group and vice versa.

### Permissions

Depending on the procedure that you want to perform, you need the following permissions:

• To view ACD Group names, you need *read* permissions for the Dictionary subsystem and the ACD Group.

## Listing all ACD Groups

To view all ACD Groups defined on the CMS server:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the **Dictionary** window.

Dictionary			×
Operations	Reports	)	
Operations:			
ACD Groups ACDs Agent Groups Agent String Values Announcements AUX Reason Codes Calculations Calculations Call Work Codes		_	
ACD: SouthR11			▼ <u>H</u> elp
		OK	Cancel

2. In the **Operations:** list, highlight **ACD Groups**.

3. Select OK.

Supervisor displays the Dictionary ACD Groups window.

創 Dictionary ACD Groups	_ 🗆 X
Actions Edit Help	
ACD Group Name:	
ACD Group Number:	

4. From the menu bar, select **Actions > List all**.

*Supervisor* displays the **Dictionary ACD Groups List all** window listing all ACD Groups defined on this *CMS* server.

## Viewing the contents of an ACD Group

To view the ACDs assigned to an ACD Group:

1. From the Controller Window, select **Commands** > **Dictionary**.

Supervisor displays the Dictionary window.

Dictionary					×
Operations	Reports		)		
Operations:					
ACD Groups					
ACDs					
Agent Groups Agent String Values					
Announcements					
AUX Reason Codes					
Calculations					
Call Work Codes					-
ACD:					
SouthR11				<b>•</b>	
Script				Help	
		П ПК		Cancel	1

2. In the **Operations:** list, highlight **ACD Groups**.

3. Select OK.

Supervisor displays the Dictionary ACD Groups window.

創 Dictionary ACD Groups	
Actions Edit Help	
ACD Group Name:	
ACD Group Number:	

- 4. In the **ACD Group Name:** field, enter the name of the ACD Group that you want to view.
- 5. From the menu bar, select **Actions** > **Find one**.

Supervisor retrieves the information for the specified ACD Group, if valid.

6. From the menu bar, select **Actions > Get contents**.

*Supervisor* displays the **Dictionary ACD Groups Get contents** window which lists all ACDs assigned to this ACD Group.

# ACDs

This section provides information on administering ACD names in the Dictionary. The **Dictionary Operations** window is used to assign names to real and pseudo ACDs. Generated reports will contain the ACDs names, rather than the assigned ACD numbers.

You can add, delete, or change an ACD name regardless of the ACD that you are currently logged in to. For example, you can be logged in to ACD 1 and change the name for ACD 3. This change does not appear on the changed window border of the ACD until you open a new window.



The Dictionary naming rules apply to these procedures. See <u>Dictionary</u> rules on page 53 for more information.

This section contains the following topics:

- Permissions on page 61
- Adding an ACD name on page 62
- Modifying an ACD name on page 63
- Deleting an ACD Name on page 64

### Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To add, delete, or modify the name of an ACD, you need *write* permissions for the Dictionary subsystem and for the ACD.
- To view ACD names, you need *read* permissions for the Dictionary subsystem and for the ACD.

## Adding an ACD name

To add a name for an ACD to the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Dictionary	N-	<b>`</b>		x
Operations	Reports			
Operations:	,			
ACD Groups			<b>^</b>	
ACDs				
Agent Groups Agent String Values				
Announcements				
AUX Reason Codes				
Calculations				
Call Work Codes			•	1
ACD:				
SouthR11			-	
Journell			<u> </u>	
Script			<u>H</u> elp	
				1
		ОК	Cancel	

- 2. In the **Operations:** list, highlight **ACDs**.
- 3. Select OK.

Supervisor displays the Dictionary ACDs window.

Dictionary ACD	s	
<u>Actions</u> <u>E</u> dit <u>H</u> elp		
<b>₽</b> ℤу		
ACD Name:		
ACD Number:		
Description:		

4. In the **ACD Name:** field, enter the name of the ACD or ACD Group that you want to add, delete, or change.

The name you assign to an ACD, pseudo ACD, or ACD Group in the Dictionary is displayed on all reports and window titles that are associated with that ACD.

5. In the ACD Number: field, enter a number between 1 and 38 to correspond with the new ACD name where 1 through 8 is reserved for real ACDs, 9 through 26 is reserved for pseudo-ACDs, and 27 through 38 is reserved for ACD Groups.

Any additional information about the ACD can be entered in the **Description:** field. Only 50 or fewer characters can be entered in this field.

## Modifying an ACD name

To modify the name of an ACD in the Dictionary:

1. From the Controller Window, select **Commands** > **Dictionary**.

Supervisor displays the Dictionary window.

Dictionary				
Operations	Reports	Ì		
Operations:				
ACD Groups				A
ACDs				
Agent Groups Agent String Values				
Announcements				
AUX Reason Codes				
Calculations Call Work Codes				-
Call WOR CODES				<u> </u>
ACD:				
SouthR11			-	
<u>S</u> cript			<u>H</u> €	lp
		OK	Can	icel

- 2. In the **Operations:** list, highlight **ACDs**.
- 3. Select OK.

Supervisor displays the Dictionary ACDs window.

the Dictionary ACDs
Actions Edit Help
ACD Name:
ACD Number:
Description:

- 4. In the **ACD Number:** field, enter the number of the ACD, pseudo-ACD, or ACD Group that you want to modify.
- 5. From the Actions menu, select Find One.
- 6. In the **ACD Name:** field, enter the new name for the selected ACD.
- 7. To add your changes to the Dictionary, select **Actions > Modify**.

## **Deleting an ACD Name**



### **A** Important:

Deleting an ACD name from the Dictionary only removes the name of the ACD. The ACD is then displayed as **unnamed\_acd** *n* where *n* is the number of the ACD. No warnings are given during the process of deleting an ACD name. This procedure should not be performed unless you are certain that you want to delete the ACD name.

To delete the name of an ACD in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Dictionary				X
Operations	Reports	Ì		
Operations:				
ACD Groups ACDs Agent Groups Agent String Values Announcements ALIX Reason Codes Calculations Calculations Call Work Codes				
ACD: SouthR11			<u> </u>	
<u>S</u> cript			<u>H</u> elp	
		ОК	Cancel	

- 2. In the **Operations:** list, highlight **ACDs**.
- 3. Select OK.

Supervisor displays the **Dictionary** window.

Dictionary ACDs	×
<u>Actions Edit H</u> elp	
ACD Name:	
ACD Number:	
Description:	

4. In the ACD Number: field, enter the number of the ACD, psuedo-ACD, or ACD Group for which you want to delete the name.

5. From the Actions menu, select Find One.

The name of the ACD is displayed in the ACD Name: field.

6. Select **Actions > Delete** to remove the ACD from the Dictionary.

# Agent groups

This section provides procedures for creating and naming, copying, and deleting agent groups in the Dictionary using the **Agent Groups** window.

Agents can be grouped for reporting purposes, without regard to the split/skill assignment for the agent. For example, you can create a group for new employees or a group for employees with special skills.

This section contains the following topics:

- Permissions on page 66
- Adding an agent group on page 67
- Listing agents in an agent group on page 68
- Copying an existing agent group to a new name on page 70
- Adding agents to an existing agent group on page 71
- <u>Deleting agents in an existing agent group</u> on page 73
- <u>Deleting an agent group</u> on page 74

### **Permissions**

Depending on the procedure that you want to perform, you need the following permissions:

- To add, delete, or modify agent groups, you need write permissions for the Dictionary subsystem.
- To view agent groups, you need read permissions for the Dictionary subsystem.

## Adding an agent group

To add an agent group to the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Operations	Reports	)	
Operations:			
ACD Groups			A
ACDs Agent Groups			
Agent String Values			
Announcements			
AUX Reason Codes			
Calculations Call Work Codes			-
Call Work Codes			
ACD:			
SouthR11			-
<u>S</u> cript			Help
		OK OK	Cancel

- 2. In the **Operations:** list, highlight **Agent Groups**.
- 3. In the **ACD:** field, enter the ACD or ACD Group on which you want to create the agent group.
- 4. Select OK.

Supervisor displays the Dictionary Agent Groups window.

🏥 Dictionary Agent Groups	
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
�§₽ <u>/ • / E</u> ₽ <u>1</u>	
Agent group name:	
Create a new group from an existing one	TSO_120

5. In the **Agent group name:** field, enter the name of the new agent group.

6. To add the agent group to the Dictionary, select Actions > Add.

7. To add the Login IDs for this agent group, select **Actions > Get Contents**.

Supervisor displays the Agent Groups-Get Contents window.

的 Dictionary Agent Groups - Get Contents	_ 🗆 ×
Actions Edit Help	
4 9 E 1	
Login ID s:	
	g3v6_8300

- 8. Enter the Login IDs for the new group.
- 9. To add the Login IDs to the Dictionary for this agent group, select the Actions > Add.

### Listing agents in an agent group

To list the agents defined in an agent group in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Dictionary			×
Operations	Reports	Ì	,
Operations:			
ACD Groups			<b>_</b>
ACDs Agent Groups			
Agent String Values			
Announcements			
AUX Reason Codes Calculations			
Call Work Codes			<b>-</b>
ACD:			
SouthR11			•
<u>S</u> cript			Help
		OK	Cancel

2. In the **Operations:** list, highlight **Agent Groups**.

3. In the **ACD**: field, enter the ACD or ACD Group on which the agent group exists.

4. Select OK.

Supervisor displays the Dictionary Agent Groups window.

🏥 Dictionary Agent Groups	_ 🗆 ×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
\$\$ <b>₽ ₹</b> \$ <b>₽ ₹</b>	
Agent group name:	
Create a new group from an existing one	TSO_120

- 5. In the **Agent group name:** field, enter the name of the agent group.
- 6. From the Actions menu, select Get contents.

Supervisor displays the Agent Groups-Get Contents window.

的 Dictionary Agent Groups - Get Contents	_ 🗆 ×
Actions Edit Help	
4 ¥ 🔲 📶	
Login IDs:	
	g3v6_8300

7. From the Actions menu, select List All.

*Supervisor* displays the **Dictionary Agent Groups-Get Contents-List All** window listing the agents in the group.

## Copying an existing agent group to a new name

To copy an existing agent group in the Dictionary to a new name:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Dictionary			x
Operations	Reports	)	
Operations:			
ACD Groups ACDs Agent Groups Agent String Values Arnouncements AUX Reason Codes Calculations Calculations Call Work Codes			×
ACD: SouthR11			 <u>H</u> elp
		OK	Cancel

- 2. In the **Operations:** list, highlight **Agent Groups**.
- 3. In the **ACD**: field, enter the ACD or ACD Group on which the agent group exists.
- 4. Select OK.

Supervisor displays the Dictionary Agent Groups window.

Dictionary Agent Groups	_ 🗆 ×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
◆ § ⓑ < ♠ ♥ 🖬 🖉 🐴	
Agent group name:	
Create a new group from an existing one	TSO_120

5. In the **Agent group name:** field, enter the name of the new agent group.

6. From the Actions menu, select Copy Group.

Supervisor displays the Dictionary-Agent Groups-Copy window.

👪 Dictionary Agent Groups - Copy	
<u>Actions E</u> dit <u>H</u> elp	
Copy from:	]
	Boulder

- 7. In the **Copy from:** field, enter the name of the agent group that you want to copy.
- 8. From the Actions menu, select Copy Group.

The new agent group is automatically populated with all the agents from the copied group.

### Adding agents to an existing agent group

To add agents to a group that already exists in the Dictionary:

From the Controller Window, select Commands > Dictionary.
 Supervisor displays the Dictionary window.

Dictionary			×
Operations	Reports	Ì	
Operations:			
ACD Groups			
ACDs Agent Groups			
Agent String Values			
Announcements			
AUX Reason Codes Calculations			
Call Work Codes			-
			_
ACD:			
SouthR11			•
Script			Help
		OK	Cancel

2. In the **Operations:** list, highlight **Agent Groups**.

3. In the **ACD**: field, enter the ACD or ACD Group on which the agent group exists.

4. Select OK.

Supervisor displays the Dictionary Agent Groups window.

創 Dictionary Agent Groups	_ 🗆 ×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
♦ ¥ ₽	
Agent group name:	
Create a new group from an existing one	TSO_120

- 5. In the **Agent group name:** field, enter the name of the agent group to which you will add agents.
- 6. From the Actions menu, select Get Contents.

Supervisor displays the Dictionary-Agent Groups-Get Contents window.

創 Dictionary Agent Groups - Get Contents	_ 🗆 ×
Actions Edit Help	
4 9 E A	
Login IDs:	
	g3v6_8300

- 7. Enter the Login IDs that you want to add to this group.
- 8. From the Actions menu, select Add.

## Deleting agents in an existing agent group

To delete agents from an existing group in the Dictionary:

1. From the Controller Window, select **Commands** > **Dictionary**.

Supervisor displays the **Dictionary** window.

Operations	Reports			
Operations:	P			
ACD Groups				
ACDs Agent Groups				
Agent String Values				
Announcements				
AUX Reason Codes Calculations				
Call Work Codes				-
400				
ACD:				
SouthR11			<b>_</b>	
Script			Help	
			<u></u>	

2. In the **Operations:** list, highlight **Agent Groups**.

- 3. In the **ACD**: field, enter the ACD or ACD Group on which the agent group exists.
- 4. Select OK.

Supervisor displays the Dictionary Agent Groups window.

創 Dictionary Agent Groups	
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
�§₽ <u>/ \ / E</u> ≝ <u>1</u>	
Agent group name:	
Create a new group from an existing one	TSO_120

5. In the **Agent group name:** field, enter the name of the agent group from which agents will be deleted.

6. From the Actions menu, select Get contents.

Supervisor displays the Agent Groups-Get Contents window.

創 Dictionary Agent Groups - Get Contents	_ 🗆 ×
Actions Edit Help	
4 9 E 1	
Login IDs:	
	g3v6_8300

- 7. Enter the Login IDs to delete from this group.
- 8. From the Actions menu, select Delete.

## Deleting an agent group

To delete an agent group from the Dictionary:

1. From the Controller Window, select **Commands** > **Dictionary**.

Supervisor displays the Dictionary window.

Dictionary					2
Operations	Reports		Ì		
Operations:					
ACD Groups ACDs Agent Groups Agent String Values Announcements AUX Reason Codes Calculations Call Work Codes					
ACD: SouthR11				•	
<u>S</u> cript				<u>H</u> elp	
		OK.		Cancel	

- 2. In the **Operations:** list, highlight **Agent Groups**.
- 3. In the **ACD**: field, enter the ACD or ACD Group on which the agent group exists.

4. Select OK.

Supervisor displays the Dictionary Agent Groups window.

創 Dictionary Agent Groups	
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
Agent group name:	
Create a new group from an existing one	TSO_120

- 5. In the **Agent group name:** field, enter the name of the agent group to delete.
- 6. From the **Actions** menu, select **Delete**.

The selected agent group name is removed from the Dictionary.

# Agent string values

Agent string values are the descriptive words in reports that correspond with agent states. These words, such as ACD, ACW, or AUX, describe the value of the data. Strings are changed to the values you administer when they are displayed as data in a report. The report heading is not affected.

This section contains the following topics:

- Permissions on page 76
- Changing agent string value descriptions on page 77
- Agent string value field descriptions on page 79

#### Permissions

Depending on the procedure that you want to perform, you will need the following permissions:

- To modify agent string values, you need write permissions for the Dictionary subsystem.
- To view agent string values, you need *read* permissions for the Dictionary subsystem.

## Changing agent string value descriptions

To change agents string value descriptions in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Dictionary	<b>*</b> -				
Operations	Reports		1		
Operations:					
ACD Groups					
ACDs					
Agent Groups Agent String Values					
Announcements					
AUX Reason Codes					
Calculations					
Call Work Codes					_
400					
ACD:					
SouthR11				<b>-</b>	
Script				Help	1
<u>s</u> cnpt			_	Teh	
		ОК		Cancel	1
				Cancer	

2. In the **Operations:** list, highlight **Agent String Values**.

3. In the **ACD:** field, select the ACD or ACD Group that you want to modify. *Supervisor* displays the **Dictionary Agent String Values** window.

Actions Edit Help	tring Values			- 🗆 ×
Z AL				
Work Mode		Call Direction		
ACD:	ACD	IN:	IN	
ACW:	ACW	OUT:	TUD	
AUX:	AUX			
AVAIL:	AVAIL	Call Origination		
DACD:	DACD	PHONE:	PHONE	
DACW:	DACW	KEYBOARD:	KEYBOARD	
OTHER:	OTHER			
RINGING:	RING	Call Destination		
UNKNOWN:	UNKNOWN	PBX:	PBX	
UNSTAFF:	UNSTAFF	OFF:	OFF	
Agent Trace Work	Mode	Agent Role		
LOGON:	LOGON	TOP:	TOP	
LOGOFF:	LOGOFF	ALLOCATED:	ALLC	
		BACKUP:	BCKP	
Call Handling Prefe	rence	ROVING:	ROVE	
LEVEL:	LVL	RESERVE:	RSRV	
NEED:	NEED			
PERCENT:	PCNT			
Reserve Level				
Rsv1:	R1			
Rsv2:	R2			
			TS	60_120

4. Enter a new descriptive word in the field that you want to change. See <u>Agent string</u> value field descriptions on page 79 for field descriptions.

# Agent string value field descriptions

The following table describes the fields for the agent string values:

Field	Description
Work Mode	<ul> <li>To change any of the work-mode default names, enter the new descriptive word in the appropriate work mode field. Agents can be in any one of the following work modes:</li> <li>ACD - The agent is on an ACD call.</li> <li>ACW - The agent is in the after-call work mode.</li> <li>AUX - The agent is in the auxiliary work mode.</li> <li>AVAIL - The agent is available to take an ACD call.</li> <li>DACD - The agent is on a direct agent ACD call.</li> <li>DACW - The agent is in the after-call work mode for a direct agent ACD call.</li> <li>DACW - The agent is in the after-call work mode for a direct agent ACD call.</li> <li>DACW - The agent is in the after-call work mode for a direct agent ACD call.</li> <li>OTHER - The agent has just logged in and CMS has not yet been notified of the agent's state, or the agent is dialing to place an extension call while in auto-in/manual-in (AI/MI), or the agent is in AI/MI and has an extension call ringing, or the agent has put a call on hold and has taken no further call-related action.</li> <li>RINGING - An ACD call is ringing at the agent's voice terminal and the agent is not doing anything else.</li> <li>UNKNOWN - CMS does not recognize the current state.</li> <li>UNSTAFF - The agent is not logged in (is not staffed).</li> </ul>
Agent Trace Work Mode	<ul> <li>To change the agent trace, work-mode default names, enter the new descriptive word next to LOGON or LOGOFF.</li> <li>LOGON - An agent is logged in.</li> <li>LOGOFF - An agent is logged out and is not available to take ACD calls.</li> </ul>
Call Handling Preference	<ul> <li>To change the call-handling preference default names, enter the new descriptive word next to LEVEL, NEED, or PERCENT.</li> <li>LEVEL - The agent's call-handling preference is by skill level.</li> <li>NEED - The agent's call-handling preference is by greatest need.</li> <li>PERCENT - The agent's call-handling preference is based on an assigned percentage of time allocated to each skill.</li> </ul>
Reserve Level	<ul> <li>To change the reserve-level default names, enter the new descriptive word next to Rsv1 or Rsv2.</li> <li>Rsv1 - The agent begins answering calls when the skill's 1st threshold is crossed.</li> <li>Rsv2 - The agent begins answering calls when the skill's second threshold is crossed.</li> </ul>

Field	Description
Call Direction	<ul> <li>To change the call-direction default names, enter the new descriptive word next to IN or OUT.</li> <li>IN - The agent is on an incoming call.</li> <li>OUT - The agent is on an outbound call.</li> </ul>
Call Origination	<ul> <li>To change the call-origination default names, enter the new descriptive word next to PHONE or KEYBOARD. Agents can be on either type of the following outbound calls:</li> <li>PHONE - The agent dialed an outbound call using the voice terminal dial pad.</li> <li>KEYBOARD - The agent dialed an outbound call using the computer keyboard.</li> </ul>
Call Destination	<ul> <li>To change the call-destination default names, enter the new descriptive word next to PBX or OFF.</li> <li>PBX - Internal to the switch.</li> <li>OFF - External to the switch.</li> </ul>
Agent Role	<ul> <li>To change the agent role default names, enter the new descriptive word next to TOP, ALLOCATED, BACKUP, ROVING, or RESERVE.</li> <li>TOP - The agent can be counted on to answer the skill's calls (unless an agent's other skills go into overload).</li> <li>ALLOCATED - The agent has a percentage of his/her time allocated to answering the skill's calls.</li> <li>BACKUP - The agent helps to answer the skill's calls when his/her top skill is not busy.</li> <li>ROVING - The agent answers a skill's calls when this skill has the greatest need.</li> <li>RESERVE - The agent helps answer the skill's calls when the skill is over threshold. These roles vary according to call-handling preference.</li> </ul>

## Announcement names

This section provides information on working with announcement names in the Dictionary. Announcements are recorded messages that are played for callers. Announcement names are synonyms assigned to these recorded messages in the Dictionary.

This section contains the following topics:

- Permissions on page 81
- Before you begin on page 81
- Adding an announcement name on page 82
- Viewing an announcement name on page 83
- Listing all announcement names for an ACD on page 84
- Modifying an announcement name on page 85
- <u>Deleting an announcement name</u> on page 86

#### Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view announcement names, you need *read* permissions for the Dictionary subsystem.
- To add, delete, or modify announcement names, you need *write* permissions for the Dictionary subsystem.

#### Before you begin

The following items should be read and understood before working with announcement names in the Dictionary:

- Announcement names must be unique.
- Multiple values are not allowed for announcement names or numbers.

### Adding an announcement name

To add a name for an announcement to the Dictionary:

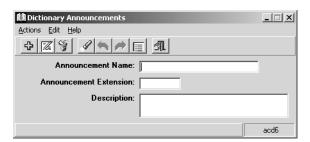
1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the **Dictionary** window.

Dictionary			x
Operations	Reports	Ì	
Derations: <u>ACD Groups</u> ACDs Agent Groups Agent String Values Announcements AUX Reason Codes Calculations Call Work Codes			×
ACD: SouthR11			▼ <u>H</u> elp
		OK	Cancel

- 2. In the **Operations:** list, highlight **Announcements**.
- 3. In the ACD: field, enter the ACD on which the announcement resides.
- 4. Select OK.

Supervisor displays the Dictionary Announcements window.



- 5. In the **Announcement Name:** field, enter the name that you want to assign to the announcement.
- 6. In the **Announcement Number:** field, enter a number that will correspond with the announcement name.

Any additional information about the announcement can be entered in the **Description:** field. Only 50 or fewer characters can be entered in this field.

7. From the Action menu, select Add.

#### Viewing an announcement name

To view an announcement name in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Operations	Reports	)	
Operations:	, ,		
ACD Groups ACDs Agent Groups Agent String Values Announcements AUX Reason Codes Calculations Calculations Calculations			×
ACD:			<b>-</b>
<u>S</u> cript			
		ОК	Cancel

- 2. In the **Operations:** list, highlight **Announcements**.
- 3. In the **ACD**: field, enter the ACD on which the announcement resides.
- 4. Select OK.

Supervisor displays the Dictionary Announcements window.

t) Dictionary Announcements	_ 🗆 🗙
Actions Edit Help	
Announcement Name:	
Announcement Extension:	
Description:	
	acd6

- 5. To find an announcement name to view, only one of the fields requires an announcement to be specified. Perform one of the following actions to specify an existing announcement in the Dictionary:
  - In the Announcement Name: field, enter the synonym name of the announcement.
  - In the Announcement Number: field, enter the number of the announcement.
- 6. From the Action menu, select Find One.

Supervisor retrieves and displays the data for the specified announcement, if valid.

### Listing all announcement names for an ACD

To list all announcement names that are defined in the Dictionary for an ACD:

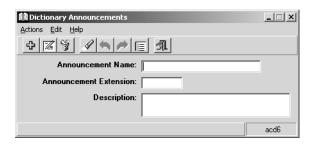
1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the **Dictionary** window.

Dictionary				×
Operations	Reports	Ì		
Operations:				
ACD Groups				
ACDs				
Agent Groups Agent String Values				
Announcements				
AUX Reason Codes				
Calculations				
Call Work Codes				<u> </u>
400				
ACD:			_	
SouthR11			<u> </u>	
Script			Help	
<u></u>			Поф	
		OK	 Cancel	1

- 2. In the **Operations:** list, highlight **Announcements**.
- 3. In the **ACD**: field, enter the ACD on which the announcement resides.
- 4. Select OK.

Supervisor displays the Dictionary Announcements window.



5. From the Action menu, select List All.

#### Modifying an announcement name

To modify an announcement name in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Operations	Reports	Ì		
Operations:	,			
ACD Groups				
ACDs Agent Groups				
Agent String Values				
Announcements				
AUX Reason Codes				
Calculations Call Work Codes				ΞI
Call Work Codes				÷
ACD:				
SouthR11			-	
· · · ·			_	- 1
<u>S</u> cript			<u>H</u> elp	
		ПК ПК	Cancel	1

- 2. In the **Operations:** list, highlight **Announcements**.
- 3. In the **ACD**: field, enter the ACD on which the announcement resides.
- 4. Select OK.

Supervisor displays the Dictionary Announcements window.

創 Dictionary Announcements	_ 🗆 🗙
Actions Edit Help	
Announcement Name:	
Announcement Extension:	
Description:	
	acd6

- 5. To find an announcement name to modify, only one of the fields requires an announcement to be specified so that it can be found. Perform one of the following actions to specify an existing announcement in the Dictionary:
  - In the Announcement Name: field, enter the name of the announcement.
  - In the Announcement Number: field, enter the number of the announcement.
- 6. From the Action menu, select Find One.

Supervisor retrieves and displays the data for the specified announcement, if valid.

- 7. In the Announcement Name: field, enter the new announcement name.
- 8. From the Action menu, select Modify.

#### Deleting an announcement name

To delete an announcement name in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Dictionary			×
Operations	Reports	Ì	
Operations:			
ACD Groups ACDs Agent Groups Agent String Values Announcements AUX Reason Codes Calculations Call Work Codes			
ACD: SouthR11			
<u>S</u> cript			Help
		OK	Cancel

- 2. In the **Operations:** list, highlight **Announcements**.
- 3. In the **ACD**: field, enter the ACD on which the announcement resides.
- 4. Select OK.

Supervisor displays the Dictionary Announcements window.

Dictionary Announcements	_ 🗆 🗙
Actions Edit Help	
Announcement Name:	
Announcement Extension:	
Description:	
	acd6

- 5. To find an announcement name to delete, only one of the fields requires an announcement to be specified so that it can be found in the Dictionary. Perform one of the following actions to specify an existing announcement in the Dictionary:
  - In the Announcement Name: field, enter the name of the announcement.

- In the Announcement Number: field, enter the number of the announcement.
- 6. From the **Action** menu, select **Find One**.
  - Supervisor retrieves and displays the data for the specified announcement, if valid.
- 7. From the **Action** menu, select **Delete**.

# AUX reason code names

This section provides information on working with AUX reason code names in the Dictionary. AUX reason codes enable a contact center to track an agent's time more precisely when the agent is in the AUX work mode. The agent can specify exactly why the AUX state is used, such as for lunch or meetings. You can view, add, delete, or change AUX reason code names by selecting **AUX Reason Codes** from the **Dictionary** menu.

Complete the **AUX Reason Codes** window if you want names associated with your AUX reason codes to appear in the AUX Reasons Code standard real-time and historical reports.

This section contains the following topics:

- Permissions on page 88
- Before you begin on page 88
- Adding an AUX reason code name on page 89
- Viewing an AUX reason code name on page 90
- Listing all AUX reason code names on page 91
- <u>Modifying an AUX reason code name</u> on page 92
- Deleting an AUX reason code on page 94

### Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view AUX reason codes, you need *read* permissions for the Dictionary subsystem.
- To add, delete, or modify AUX reason codes, you need *write* permissions for the Dictionary subsystem.

#### Before you begin

The following items should be read and understood before working with AUX reason code names in the Dictionary:

- To use AUX reason codes, your switch must have EAS.
- AUX reason codes are single digits, 0 through 9.
- AUX reason code names can be up to 20 characters long.

- AUX reason code 0 is used for cases in which the switch automatically puts an agent into AUX work mode. You can change this name.
- Names must be unique within an ACD. No two AUX reason codes in the same ACD can have the same name.
- If you make changes to the AUX reason code names you must restart any report that uses AUX reason codes to see the changes.

### Adding an AUX reason code name

To add a name in the Dictionary for an AUX reason code:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Dictionary	<u>×</u>				2
Operations	Reports		]		
Operations:					
ACD Groups					
ACDs					
Agent Groups Agent String Values					
Announcements					
AUX Reason Codes					
Calculations					
Call Work Codes					_
<u>A</u> CD: SouthR11				•	
<u>S</u> cript				<u>H</u> elp	
		OK		Cancel	

- 2. In the **Operations:** list, highlight **AUX Reason Codes**.
- In the ACD: field, enter the ACD or ACD Group on which the AUX Reason Codes reside.
- 4. Select OK.

Supervisor displays the Dictionary AUX Reason Codes window.

鶴 Dictionary AUX Reason Codes	<
Actions Edit Help	
AUX Reason Code name:	
AUX Reason Code:	
Description:	
Bison36vpe	

- 5. In the **AUX Reason Code name:** field, enter the name for the AUX reason code.
- 6. In the **AUX Reason Code:** field, enter the one-digit AUX reason code number, between 0 and 9.

Any additional information about the AUX reason code can be entered in the **Description:** field. Only 50 or fewer characters can be entered in this field.

7. From the Action menu, select Add.

#### Viewing an AUX reason code name

To view the name of an AUX reason code in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Dictionary			×
Operations	Reports	)	
Operations:			
ACD Groups ACDs Agent Groups Agent String Values Announcements AUX Reason Codes Calculations Call Work Codes			
ACD: SouthR11			<b>.</b>
Script			Help
		OK	Cancel

- 2. In the Operations: list, highlight AUX Reason Codes.
- 3. In the **ACD:** field, enter the ACD or ACD Group on which the AUX Reason Codes reside.
- 4. Select OK.

Supervisor displays the Dictionary AUX Reason Codes window.

t鼬 Dictionary AUX Reason Codes	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
AUX Reason Code name:	
AUX Reason Code: 🔽	
Description:	
	Bison36vpe

- 5. To find an AUX reason code name to view, only one of the fields requires an AUX reason code to be specified. Perform one of the following actions to specify an existing AUX reason code in the Dictionary:
  - In the AUX Reason Code name: field, enter the name for the AUX reason code.
  - In the AUX Reason Code: field, enter the one-digit AUX reason code number, between 0 and 9.
- 6. From the Actions menu, select Find One.

*Supervisor* retrieves and displays the information for the specified AUX reason code, if valid.

#### Listing all AUX reason code names

To list all AUX reason code names in the Dictionary for an ACD:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Operations:     ACD Groups       ACDs     Agent Groups       Agent String Values     Announcements       ANDWR Reason Codes     Calculations       Calculations     Calculations       Call Work Codes     ▼	Operations	Reports	Ì		
ACD: Agent String Values Agent String Values Announcements AUX Reason Codes Calculations Calculations Call Work Codes		,			
SouthR11	ACDs Agent Groups Agent String Values Announcements AUX Reason Codes Calculations				×
				<u>-</u>	Help

- 2. In the **Operations:** list, highlight **AUX Reason Codes**.
- 3. In the **ACD:** field, enter the ACD or ACD Group on which the AUX Reason Codes reside.

4. Select OK.

Supervisor displays the Dictionary AUX Reason Codes window.

🏥 Dictionary AUX Reason Codes	×
<u>Actions Edit H</u> elp	
AUX Reason Code name:	
AUX Reason Code:	
Description:	
	Bison36vpe

5. From the Actions menu, select List All.

Supervisor displays the Dictionary AUX Reason Codes - List All window.

Dictionary AUX Reason Codes - List All     Actions Edit Help		
AUX Reason Code Name	Code	Description
Reason A	1	
Reason B	2	
Reason C		
Reason D		
Reason E	5	
Reason F	6	-
•		
9 matches found; permitted o	nes displa	ed Bison36vpe

## Modifying an AUX reason code name

To modify an AUX reason code name in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Operations	Reports	)	
_ perations:	1	I	
ACD Groups			<b>_</b>
ACDs Agent Groups			
Agent String Values			
Announcements			
AUX Reason Codes Calculations			
Call Work Codes			-
ACD:			
SouthR11			<b>-</b>
Script			Help
<u>o</u> onpen.			
		OK OK	Cancel

- 2. In the **Operations:** list, highlight **AUX Reason Codes**.
- 3. In the **ACD:** field, enter the ACD or ACD Group on which the AUX reason codes reside.
- 4. Select OK.

Supervisor displays the Dictionary AUX Reason Codes window.

🏥 Dictionary AUX Reason Codes 🛛 🛛 🛛
<u>Actions</u> <u>E</u> dit <u>H</u> elp
AUX Reason Code name:
AUX Reason Code:
Description:
Bison36vpe

- 5. To find an AUX reason code name to modify, only one of the fields requires an AUX reason code name to be specified. Perform one of the following actions to specify an existing AUX reason code name in the Dictionary:
  - In the AUX Reason Code name: field, enter the name for the AUX reason code.
  - In the AUX Reason Code: field, enter the one-digit AUX reason code number, between 0 and 9.
- 6. From the Actions menu, select Find One.

*Supervisor* retrieves and displays the information for the specified AUX reason code, if valid.

- 7. In the AUX Reason Code name: field, enter the new name for the AUX reason code.
- 8. From the Actions menu, select Modify.

Supervisor updates the name for the AUX reason code in the database.

## **Deleting an AUX reason code**

To delete an AUX reason code name from the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Dictionary				×
Operations	Reports	)		
Operations: ACD Groups ACDs Agent Groups Agent String Values Announcements AUX Reason Codes Calculations Calculations Calculations				•
ACD: SouthR11			Help	
		OK I	Cancel	

- 2. In the Operations: list, highlight AUX Reason Codes.
- 3. In the **ACD:** field, enter the ACD or ACD Group on which the AUX reason codes reside.
- 4. Select OK.

Supervisor displays the Dictionary AUX Reason Codes window.

🏥 Dictionary AUX Reason Codes	×
<u>A</u> ctions <u>E</u> dit <u>H</u> elp	
AUX Reason Code name:	
AUX Reason Code:	
Description:	
	Bison36ype

- 5. To find an AUX reason code name to delete, only one of the fields requires an AUX reason code to be specified. Perform one of the following actions to specify an existing AUX reason code in the Dictionary:
  - In the AUX Reason Code name: field, enter the name for the AUX reason code.
  - In the AUX Reason Code: field, enter the one-digit AUX reason code number, between 0 and 9.

6. From the **Actions** menu, select **Find One**.

*Supervisor* retrieves and displays the information for the specified AUX reason code, if valid.

7. From the **Actions** menu, select **Delete**.

Supervisor removes the specified AUX reason code from the Dictionary.

# Calculations

Calculation names are abbreviated names for the calculations in the database that are used to create reports. You can view standard calculations or create your own custom calculations to use in custom reports. The names for calculations used in standard reports already exist in the Dictionary.

This section contains the following topics:

- Permissions on page 96
- Before you begin on page 96
- Viewing a calculation on page 97
- Listing all calculations on page 99
- Adding a calculation on page 100
- Modifying a custom calculation on page 101
- <u>Deleting a custom calculation</u> on page 102

### Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view calculations, you need *read* permissions for the Dictionary subsystem.
- To create, delete or modify a custom calculation, you need *write* permissions for the Dictionary subsystem.

#### Before you begin

The following items should be read and understood before changing calculations in the Dictionary:

- Calculations must be one word with no blanks.
- Reports will not run if you embed calculations more than three levels deep.
- Standard calculations cannot be deleted.

The standard CMS calculations are listed in the following documents:

- Avaya CMS Database Items and Calculations
- Avaya CMS Supervisor Report Designer User Guide

- Avaya CMS Supervisor Reports
- Avaya CMS Custom Reports
- It is recommended that you identify your own calculations in all lowercase letters to distinguish them from the standard *CMS* calculations, which are in all uppercase letters.
- If you delete a custom calculation from the Dictionary, any reports that it appeared in will not run.
- You can adversely affect standard reports if you change a standard *CMS* calculation. Reports will probably run, but the results may be different from those expected.
- Reports will not run if you create calculations that reference each other in a circular fashion. For example, assume that CALC\_1 uses CALC\_2 in its processing. If CALC\_2 then uses CALC\_1 in its processing, this creates a circular pattern where processing cannot be completed.

#### Viewing a calculation

To view a calculation in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Dictionary				x
Operations	Reports	Ì		
Operations:	P			
ACD Groups ACDs Agent Groups Agent String Values Announcements AUX Reason Codes Calculations				
Call Work Codes				
SouthR11			-	
<u>S</u> cript			<u>H</u> elp	
		(OK	Cancel	

2. In the **Operations:** list, highlight **Calculations**.

#### 3. Select OK.

Supervisor displays the Dictionary Calculations window.

鶴 Dictionary Calculations
Actions Edit Help
Calculation name:
Calculation:
Description:

- 4. To find a calculation to view, only one of the fields requires a calculation to be specified. Perform one of the following actions to specify an existing database calculation in the Dictionary:
  - If you know the name of the calculation, enter it in the Calculation name: field.
  - If you do not know the name of the calculation, perform the following steps to view all the calculations alphabetically:
    - i. Leave all the fields in the **Dictionary Calculations** window blank, and from the **Actions** menu, select **Find One**.
    - ii. Use the **Next** or **Previous** buttons to move through the list of existing calculations.

## Listing all calculations

To list all calculations in the Dictionary:

1. From the Controller Window, select **Commands** > **Dictionary**.

Supervisor displays the Dictionary window.

Dictionary	Reports	)			
Operations	hepoils				
Operations:					
ACD Groups					
ACDs					
Agent Groups Agent String Values					
Announcements					
AUX Reason Codes					
Calculations					
Call Work Codes					_
ACD:					
SouthR11				•	
Script					1
<u>s</u> cript			_	<u>H</u> elp	
		П. ПК		Cancel	1
		UN		Cancer	

- 2. In the **Operations:** list, highlight **Calculations**.
- 3. Select OK.

Supervisor displays the **Dictionary Calculations** window.

🏥 Dictionary Calculations 🛛 🛛 🗙
Actions Edit Help
Calculation name:
Calculation:
Description:

4. From the Actions menu, select List All.

## Adding a calculation

To add a calculation in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Dictionary			x
Operations	Reports	)	,
Derations: ACD Groups ACDs Agent Groups Agent String Values Announcements AUX Reason Codes Calculations Calculations Call Work Codes			×
ACD: SouthR11			▼ <u>H</u> elp
		OK I	Cancel

- 2. In the **Operations:** list, highlight **Calculations**.
- 3. Select OK.

Supervisor displays the Dictionary Calculations window.

創 Dictionary Calculations	X
Actions Edit Help	
Calculation name:	
Calculation:	
Description:	

4. Enter the name of the calculation in the Calculation name: field.

#### **A** Important:

Use lowercase letters in the name to distinguish this custom calculations from a standard *CMS* calculation.

5. In the **Calculation:** field, enter the formula for the calculation.

Formulas can include:

Database items

- Constants
- Calculations (the maximum nesting level is 3)
- The following arithmetic operators:

- + (add)

- - (subtract)
- \* (multiply)
- / (divide)
- () (do first, as in standard mathematical operations)

Any additional information about the calculation can be entered in the **Description:** field. Only 50 or fewer characters can be entered in this field.

6. From the Actions menu, select Add.

The custom calculation is added to the Dictionary.

#### Modifying a custom calculation

#### Important:

Modifying a standard *CMS* calculation is not recommended. If you modify a standard *CMS* calculation, the meaning of that calculation is changed in every report in which it appears.

To modify a custom calculation:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the **Dictionary** window.

Dictionary					×
Operations	Reports		1		
Operations:					
ACD Groups					-
ACDs				Ī	
Agent Groups Agent String Values				-	_
Announcements					
AUX Reason Codes					
Calculations Call Work Codes					-1
J Call Work Codes					-
ACD:					
SouthR11				-	
Journali					
Script				<u>H</u> elp	
		OK		Cancel	

2. In the **Operations:** list, highlight **Calculations**.

#### 3. Select OK.

Supervisor displays the Dictionary Calculations window.

🏥 Dictionary Calculations
Actions Edit Help
Calculation name:
Calculation:
Description:

- 4. Enter the name of the custom calculation in the Calculation name: field.
- 5. From the Actions menu, select Find One.
- 6. In the **Calculation:** field, enter the new formula.

Any changes to the descriptive information, can be entered in the **Description:** field.

7. From the Actions menu, select Modify.

### **Deleting a custom calculation**

To delete a custom calculation:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Dictionary			[	×
Operations	Reports	)		
Operations:				I
ACD Groups ACDs			<u> </u>	I
Agent Groups				I
Agent String Values				I
Announcements AUX Reason Codes				
Calculations Call Work Codes			-	
Call Work Codes				
ACD:				I
SouthR11			<u> </u>	
Script			Help	
		ОК	Cancel	

2. In the Operations: list, highlight Calculations.

#### 3. Select OK.

Supervisor displays the Dictionary Calculations window.

創 Dictionary Calculations
Actions Edit Help
Calculation name:
Calculation:
Description:

- 4. Enter the name of the custom calculation in the **Calculation name:** field.
- 5. From the **Actions** menu, select **Find One**.

Supervisor retrieves and displays the information for the specified calculation, if valid.

6. From the **Actions** menu, select **Delete**.

The specified calculation is removed from the Dictionary.

## **Call work codes**

Call work codes are numeric sequences that are entered by agents to categorize the type of call that they have just received or are currently handling. By entering call work codes, agents can assign one of many defined categories to the calls which can be later viewed in detail through reports. The call work codes are defined in the Dictionary and can be used to represent any type of call in which there is an interest in tracking, such as complaints, special sales, promotional events, and so forth. Up to five call work codes can be assigned to each call. You can view, add, delete, or modify call work codes and their names from the **Call Work Codes** window. These names then appear in the standard Call Work Code historical report.

This section contains the following topics:

- Permissions on page 104
- Before you begin on page 104
- Adding a name to a call work code on page 105
- <u>Viewing a call work code name</u> on page 106
- Listing all call work code names on page 107
- Modifying a call work code name on page 108
- Deleting a call work code name on page 109

#### Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view call work code names, you need *read* permissions for the Dictionary subsystem.
- To add, delete or modify call work code names, you need *write* permissions for the Dictionary subsystem.

#### Before you begin

The following items should be read and understood before changing call work codes in the Dictionary:

- Call work codes must be activated on the ACD before the administration and naming of them can be performed.
- Call work codes require storage space on the CMS file system. The number of call work codes available on a system must be configured through the **Data Storage Allocation**

window. See <u>Chapter 10: Configuring CMS system settings</u> on page 461 for more information.

- Call Work Code 0 is reserved for unadministered work codes so that summary data can be collected. The default name for Call Work Code 0 is Unadministered codes, but this name can be modified.
- Even though call work codes can be up to 16 digits in length, a Dictionary name can only be assigned to a call work code that is 9 digits in length.

#### Adding a name to a call work code

To add a name to a call work code:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the **Dictionary** window.

Dictionary	N		•		×
Operations	Reports				
Operations:					
ACD Groups					
ACDs					
Agent Groups Agent String Values					
Announcements					
AUX Reason Codes					
Calculations					
Call Work Codes					<u> </u>
100					
ACD:					
SouthR11				<b>•</b>	
<u>S</u> cript				<u>H</u> elp	
		OK		Cancel	1

- 2. In the **Operations:** list, highlight **Call Work Codes**.
- 3. In the **ACD**: field, enter the ACD on which the call work code resides.
- 4. Select OK.

Supervisor displays the Dictionary Call Work Codes window.

鶴 Dictionary Call Work Codes	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
Call work code name:	_
Call work code:	
	Bison36vpe

5. In the **Call work code name:** field, enter the name of the of the new call work code.

- 6. In the Call work code: field, enter the number of the of the new call work code.
- 7. From the Actions menu, select Add.

The specified call work code and its associated name is added to the Dictionary.

#### Viewing a call work code name

To view the name assigned to a call work code in the Dictionary:

From the Controller Window, select Commands > Dictionary.
 Supervisor displays the Dictionary window.

Dictionary					>
Operations	Reports		1		
Operations:					
ACD Groups AcDs Agent Groups Agent String Values Announcements AUX Reason Codes Calculations Calculations Call Work Codes					•
ACD: SouthR11				•	
<u>S</u> cript				<u>H</u> elp	
		OK		Cancel	

- 2. In the **Operations:** list, highlight **Call Work Codes**.
- 3. In the ACD: field, enter the ACD on which the call work code resides.
- 4. Select OK.

Supervisor displays the Dictionary Call Work Codes window.

鶴 Dictionary Call Work Codes	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
Call work code name:	_
Call work code:	
10	
	Bison36vpe

- 5. To find a call work code name to view, only one of the fields requires a call work code to be specified. Perform one of the following actions to specify an existing call work code in the Dictionary:
  - In the **Call work code name:** field, enter the name of the call work code.

- In the Call work code: field, enter the number of the of the call work code.
- 6. From the Actions menu, select Find One.

*Supervisor* retrieves and displays the information for the specified call work code, if valid.

### Listing all call work code names

To list all call work code names in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

#### Supervisor displays the Dictionary window.

Dictionary				×
Operations	Reports	)		
Operations:				
ACD Groups ACDs Agent Groups Agent String Values			Ê	
Announcements AUX Reason Codes Calculations Call Work Codes			•	
ACD:				
SouthR11			•	
<u>S</u> cript			<u>H</u> elp	
		OK	Cancel	

- 2. In the **Operations:** list, highlight **Call Work Codes**.
- 3. In the **ACD:** field, enter the ACD on which the call work codes reside.
- 4. Select OK.

Supervisor displays the Dictionary Call Work Codes window.

鶴 Dictionary Call Work Codes	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
Call work code name:	
Call work code:	
	Bison36vpe

5. From the Actions menu, select List All.

## Modifying a call work code name

To modify a call work code name in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Dictionary	) Banasta	)		>
Operations	Reports			
Operations:				
ACD Groups				
ACDs				
Agent Groups Agent String Values				
Announcements				
AUX Reason Codes				
Calculations				
Call Work Codes				•
ACD.				
ACD:				
SouthR11			<b>-</b>	
Script			Help	1
<u>o</u> onpe			<u>Tieb</u>	
		ПК	Cancel	1

- 2. In the **Operations:** list, highlight **Call Work Codes**.
- 3. In the ACD: field, enter the ACD on which the call work code resides.
- 4. Select OK.

Supervisor displays the Dictionary Call Work Codes window.

🏥 Dictionary Call Work Codes	X
Actions Edit Help	
Call work code name:	
Call work code:	
	Bison36vpe

- 5. To find a call work code name to modify, only one of the fields requires a call work code to be specified. Perform one of the following actions to specify an existing call work code in the Dictionary:
  - In the Call work code name: field, enter the name of the of the call work code.
  - In the Call work code: field, enter the number of the of the call work code.
- 6. From the Actions menu, select Find One.

*Supervisor* retrieves and displays the information for the specified call work code, if valid.

- 7. In the **Call work code name:** field, enter the new name for the of the call work code.
- 8. From the Actions menu, select Modify.

The specified call work code entry is modified in the Dictionary.

#### Deleting a call work code name

To delete the name of a call work code in the Dictionary:

 From the Controller Window, select Commands > Dictionary. Supervisor displays the Dictionary window.

Dictionary	Departs	)	<u>×</u>
Operations	Reports		
Operations:			
ACD Groups			<b>▲</b>
ACDs			
Agent Groups Agent String Values			
Agent String Values			
AUX Reason Codes			
Calculations			
Call Work Codes			▼
ACD:			
SouthR11			<u> </u>
Script			Help
		OK.	Cancel

- 2. In the **Operations:** list, highlight **Call Work Codes**.
- 3. In the ACD: field, enter the ACD on which the call work code resides.
- 4. Select OK.

Supervisor displays the Dictionary Call Work Codes window.

鶴 Dictionary Call Work Codes	×
<u>Actions</u> <u>Edit</u> <u>H</u> elp	
Call work code name:	_
Call work code:	
	Bison36vpe

- 5. To find a call work code name to delete, only one of the fields requires a call work code to be specified. Perform one of the following actions to specify an existing call work code in the Dictionary:
  - In the **Call work code name:** field, enter the name of the of the call work code.
  - In the **Call work code:** field, enter the number of the of the call work code.

6. From the Actions menu, select Find One.

*Supervisor* retrieves and displays the information for the specified call work code, if valid.

7. From the **Actions** menu, select **Delete**.

The specified call work code is removed from the Dictionary.

# Constants

Constants are items with fixed numerical values that you can enter into the Dictionary for use only in custom and designer reports. Constants do not exist in *CMS* when it is installed.

This section contains the following topics:

- Permissions on page 111
- Adding a constant on page 112
- <u>Viewing a constant</u> on page 113
- Listing all constants on page 114
- Modifying a constant on page 115
- Deleting a constant on page 116

## Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view a constant, you need *read* permissions for the Dictionary subsystem.
- To add, delete or modify a constant, you need write permissions for the Dictionary subsystem.

## Adding a constant

To add a constant to the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Dictionary			x
Operations	Reports	)	
Derations: <u>ACD Groups</u> ACDs Agent Groups Agent String Values Arnouncements AUX Reason Codes Calculations Call Work Codes			×
ACD: SouthR11			 <u>H</u> elp
		OK	Cancel

- 2. In the **Operations:** list, highlight **Constants**.
- 3. Select OK.

Supervisor displays the Dictionary Constants window.

Dictionary Constants	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
Constant name:	
Value:	
Description:	

- 4. In the **Constant name:** field, enter the name of the new constant.
- 5. In the **Value:** field, enter the numerical value of the constant. The value can range from -99999 to 999999.

Any additional information about the constant can be entered in the **Description:** field. Only 50 or fewer characters can be entered in this field.

6. From the Actions menu, select Add.

#### Viewing a constant

To view a constant in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Operations	Reports	Ì		
Operations:				
ACD Groups			A	
ACDs Agent Groups				L
Agent String Values				1
Announcements				
AUX Reason Codes				
Calculations Call Work Codes			-	1
,				1
ACD:				
SouthR11			-	
Script			Help	1
Soubern 1				

- 2. In the **Operations:** list, highlight **Constants**.
- 3. Select OK.

Supervisor displays the **Dictionary Constants** window.

Dictionary Constants	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
Constant name:	
Value:	
Description:	

- 4. To find a constant to view, only one of the fields requires an entry to be specified. Perform one of the following actions to specify an existing constant in the Dictionary:
  - In the Constant name: field, enter the name of the constant.
  - In the Value: field, enter the numerical value of the constant.
- 5. From the Actions menu, select Find One.

Supervisor retrieves and displays the information for the specified constant, if valid.

# Listing all constants

To list all constants defined in the Dictionary:

1. From the Controller Window, select **Commands** > **Dictionary**.

Supervisor displays the Dictionary window.

Dictionary			X
Operations	Reports	Ì	
Derations: <u>ACD Groups</u> ACDs Agent Groups Agent String Values Announcements AUX Reason Codes Calculations Call Work Codes			×
<u>A</u> CD: SouthR11 <u>S</u> cript			▼ <u>H</u> elp
		OK	Cancel

- 2. In the **Operations:** list, highlight **Constants**.
- 3. Select OK.

Supervisor displays the Dictionary Constants window.

Dictionary Constants
<u>Actions Edit H</u> elp
Constant name:
Value:
Description:

4. From the Actions menu, select List All.

#### Modifying a constant

To modify a constant that is defined in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Operations:         ACD Groups         ACD S         Agent Groups         Agent Groups         Agent String Values         Announcements         AUX Reason Codes         Calculations         Calculations         Calculations         Calculations         Calculations         SouthR11	Operations	Reports	Ì		
ACDs Agent String Values Announcements AUX Reason Codes Calculations Call Work Codes	Operations:				
ACD:	ACDs Agent Groups Agent String Values Announcements AUX Reason Codes Calculations				
	SouthR11			-	
Script Help	<u>S</u> cript			<u>H</u> elp	5

- 2. In the **Operations:** list, highlight **Constants**.
- 3. Select OK.

Supervisor displays the Dictionary Constants window.

🏥 Dictionary Constants 🛛 🛛 🛛
<u>Actions</u> <u>E</u> dit <u>H</u> elp
◆ ℤ ኝ <b>/ ≒ / E 1</b>
Constant name:
Value:
Description:

- 4. To find a constant to modify, only one of the fields requires an entry to be specified. Perform one of the following actions to specify an existing constant in the Dictionary:
  - In the Constant name: field, enter the name of the constant.
  - In the Value: field, enter the numerical value of the constant.
- 5. From the Actions menu, select Find One.

Supervisor retrieves and displays the information for the specified constant, if valid.

6. In the Value: field, enter the new numerical value for the constant.

Note:

You cannot modify the name of the new constant. If you want to change the name, you must delete the old constant and add a new one.

7. From the Actions menu, select Modify.

#### **Deleting a constant**

To delete a constant from the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Dictionary					
Operations	Reports		)		
Operations:					
ACD Groups ACDs Agent Groups Agent String Values Announcements AUX Reason Codes Calculations Calculations Call Work Codes					► ▼
ACD: SouthR11				•	
<u>S</u> cript				<u>H</u> elp	
		OK		Cancel	

- 2. In the **Operations:** list, highlight **Constants**.
- 3. Select OK.

Supervisor displays the Dictionary Constants window.

Dictionary Constants	×
<u>Actions Edit H</u> elp	
◆ ℤ ℌ ✔ ♠ ≠ ⋿ ⋬	
Constant name:	
Value:	
Description:	

- 4. To find a constant to delete, only one of the fields requires an entry to be specified. Perform one of the following actions to specify an existing constant in the Dictionary:
  - In the **Constant name:** field, enter the name of the constant.

- In the Value: field, enter the numerical value of the constant.
- 5. From the **Actions** menu, select **Find One**.

Supervisor retrieves and displays the information for the specified constant, if valid.

6. From the **Actions** menu, select **Delete**.

The specified constant is removed from the Dictionary.

# **Custom database items**

You can define your own custom database items, which are stored in the *CMS* database. The custom database items are entered from the **Dictionary Custom Items** window, and allow you to combine your own data with the *CMS* data on custom or designer reports. You can also modify or delete custom database items.

This section contains the following topics:

- Permissions on page 118
- Before you begin on page 118
- Adding a custom database item on page 119
- Viewing a custom database item on page 120
- Listing all custom database items on page 121
- Modifying a custom database item on page 122
- Deleting a custom database item on page 123

## Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view a custom database item, you need *read* permissions for the Dictionary subsystem.
- To add, delete, or modify a custom database item, you need *write* permissions for the Dictionary subsystem.

## Before you begin

The following items should be read and understood before working with custom database items in the Dictionary:

• You must first create the table in the database before you create a custom database item.

#### Adding a custom database item

To create a custom database item in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the **Dictionary** window.

Dictionary				2
Operations	Reports	)		
Operations:				
ACD Groups ACDs				
ALD's Agent Groups				
Agent String Values				
Announcements AUX Reason Codes				
Calculations				
Call Work Codes				<b>_</b>
ACD:				
SouthR11			-	
Jouunnii				
<u>S</u> cript			H	elp
		OK	Ca	ncel

- 2. In the **Operations:** list, highlight **Custom Items**.
- 3. Select OK.

Supervisor displays the Dictionary Custom Items window.

鶴 Dictionary Custom Items	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
Database item:	
Description:	
Table:	

4. In the **Database item:** field, enter the name of the new database item.

Any additional information about the custom database item can be entered in the **Description:** field. Only 50 or fewer characters can be entered in this field.

- 5. In the **Table:** field, enter the name of the table that will contain the new custom database item.
- 6. From the **Actions** menu, select **Add**.

## Viewing a custom database item

To view a custom database item in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Dictionary			×
Operations	Reports	)	
Derations: ACD Groups ACDs Agent Groups Agent String Values Announcements		_	<u> </u>
Announcements AUX Reason Codes Calculations Call Work Codes			<b></b>
ACD:			_
SouthR11			·
<u>S</u> cript			<u>H</u> elp
		OK	Cancel

- 2. In the **Operations:** list, highlight **Custom Items**.
- 3. Select OK.

Supervisor displays the Dictionary Custom Items window.

創 Dictionary Custom Items	X
Actions Edit Help	
Database item:	
Description:	
Table:	

- 4. In the **Database item:** field, enter the name of the custom database item.
- 5. From the Actions menu, select Find One.

*Supervisor* retrieves and displays the information for the specified custom database item, if valid.

## Listing all custom database items

To list all custom database items in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the **Dictionary** window.

Dictionary					
Operations	Reports		)		
Operations:					
ACD Groups					
ACDs					
Agent Groups Agent String Values					
Announcements					
AUX Reason Codes					
Calculations					
Call Work Codes					<u> </u>
ACD:					
SouthR11				•	
<u>S</u> cript				<u>H</u> elp	
		ПК		Cancel	1

- 2. In the **Operations:** list, highlight **Custom Items**.
- 3. Select OK.

Supervisor displays the Dictionary Custom Items window.

t) Dictionary Custom Items	X
Actions Edit Help	
Database item:	
Description:	
Table:	

4. In the **Database item:** field, enter the name of the custom database item.

5. From the Actions menu, select List All.

## Modifying a custom database item

To modify an existing custom database item in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Dictionary Operations	Reports	•	1		>
uperations	nepoits				
Operations:					
ACD Groups					
ACDs					
Agent Groups Agent String Values					
Agent string values Announcements					
AUX Reason Codes					
Calculations					
Call Work Codes					<b>_</b>
100					
ACD:					
SouthR11				-	
Script				Help	1
<u>s</u> cnpc				Teih	
		ΠΚ	1	Cancel	1
		L		Cancer	

- 2. In the **Operations:** list, highlight **Custom Items**.
- 3. Select OK.

Supervisor displays the Dictionary Custom Items window.

鸙 Dictionary Custom Items	×
Actions Edit Help	
Database item:	
Description:	
Table:	

- 4. In the Database item: field, enter the new name for the custom database item.
- 5. In the **Table:** and **Description:** fields, enter the new information for the custom database item. Only 50 or fewer characters can be entered in the **Description:** field.

Note:

Note: You cannot modify the name of a custom database item. You must delete the old item and add the new item if you want a different name.

6. From the Actions menu, select Modify.

The specified custom database item and its changes are saved to the Dictionary.

#### Deleting a custom database item

To delete a custom database item from the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the **Dictionary** window.

Dictionary				2
Operations	Reports	Ì		
Operations:				
ACD Groups ACDs Agent Groups Agent String Values Announcements AUX Reason Codes Calculations Call Work Codes				
ACD:				
ISOUTHII			<u> </u>	
<u>S</u> cript				Help
		OK		Cancel

- 2. In the **Operations:** list, highlight **Custom Items**.
- 3. Select OK.

Supervisor displays the Dictionary Custom Items window.

Dictionary Custom Items	×
Actions Edit Help	
Database item:	
Description:	
Table:	

- 4. In the **Database item:** field, enter the name of the database item to delete.
- 5. From the Actions menu, select Find One.

*Supervisor* retrieves and displays the information for the specified custom database item, if valid.

6. From the Actions menu, select Delete.

The specified custom database item is removed from the Dictionary.

# **Generic string values synonyms**

Modifying generic string values allows you to enter a replacement string for the default  $\mathbf{y}$  for YES and  $\mathbf{n}$  for NO values. The string values can be up to six characters in length. These modified string values appear in custom or designer reports that use the YES or NO synonyms.

This section contains the following topics:

- Permissions on page 124
- Viewing generic string values on page 125
- Modifying generic string values on page 126

#### **Permissions**

Depending on the procedure that you want to perform, you need the following permissions:

- To view generic string values, you need *read* permissions for the Dictionary subsystem.
- To modify generic string values, you need *write* permissions for the Dictionary subsystem.

# Viewing generic string values

To view a generic string value from the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the **Dictionary** window.

Operations	Reports	)	
Operations:			
ACD Groups ACDs Agent Groups Agent String Values Announcements AUX Reason Codes Calculations Calculations Calculations			<b>▼</b>
ACD:			<b>•</b>
Script			<u>H</u> elp
		OK	Cancel

- 2. In the Operations: list, highlight Generic String Values.
- 3. In the **ACD:** field, enter the ACD or ACD Group on which the generic string values reside.
- 4. Select OK.

Supervisor displays the Dictionary Generic String Values window.

Dictionary Generic String Values	
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
Generic Value	
YES: y	
NO: n	
	test

## Modifying generic string values

To modify an existing generic string value in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Dictionary			×
Operations	Reports	)	
Derations: ACD Groups ACDs Agent Groups Agent String Values Announcements AUX Reason Codes Calculations Call Work Codes			•
ACD: SouthR11			▼ <u>H</u> elp
		OK	Cancel

- 2. In the **Operations:** list, highlight **Generic String Values**.
- 3. In the **ACD:** field, enter the ACD or ACD Group on which the generic string values reside.
- 4. Select OK.

Supervisor displays the Dictionary Generic String Values window.

Dictionary Generic String Values	
Actions Edit Help	
Generic Value	
YES: y	
NO: n	
	test

- 5. In the **YES:** field, enter up to six characters.
- 6. In the NO: field, enter up to six characters.

The characters entered in the **YES**: and **NO**: fields will appear in reports that use YES and NO fields.

7. From the Actions menu, select Modify.

# **Location IDs**

Location IDs represent the physical location or site where an agent sits or the port network to which a trunk is assigned. Location IDs can be named for ease of identification in reporting for multi-site environments. The same location IDs and their synonyms are used for both agents and trunks.

This section contains the following topics:

- Permissions on page 127
- Adding a location ID on page 128
- Viewing a location ID on page 129
- Listing all location IDs on page 130
- Modifying a location ID on page 131
- Deleting a Location ID on page 132

#### **Permissions**

Depending on the procedure that you want to perform, you need the following permissions:

- To view the name of a location ID, you need *read* permissions for the Dictionary subsystem.
- To add, delete, or modify the name of a location ID, you need *write* permissions for the Dictionary subsystem.

## Adding a location ID

To add a location ID to the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Dictionary	A			
)perations	Reports			
Operations:				
ACD Groups				
ACDs Agent Groups				
Agent String Values				
Announcements				
AUX Reason Codes				
Calculations				-
Call Work Codes				<u> </u>
ACD:				
SouthR11			<b>_</b>	
Script			Help	
		C OK		1

- 2. In the **Operations:** list, highlight **Location IDs**.
- 3. In the ACD: field, enter the ACD on which you want to add the location ID.
- 4. Select OK.

Supervisor displays the Dictionary Location IDs window.

t自 Dictionary Location IDs	
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
¢⊠§∕\$∧∕⊑ 1	
Location Name:	
Location ID:	
Description:	
	test2

- 5. In the Location name: field, enter the name of the new location.
- 6. In the Location ID: field, enter the number from 1 to 44 for the new location.

Any additional information about the location ID can be entered in the **Description**: field. Only 50 or fewer characters can be entered in this field.

7. From the Actions menu, select Add.

#### Viewing a location ID

To view the information associated with an existing location ID in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the **Dictionary** window.

Operations	Reports		)		
Operations:					
ACD Groups					
ACDs Agent Groups					
Agent String Values					
Announcements					
AUX Reason Codes Calculations					
Call Work Codes					•
ŕ					
ACD:				-	
SouthR11			_	1	
Script				Help	1
				Ticib	
		[			

2. In the Operations: list, highlight Location IDs.

- 3. In the **ACD**: field, enter the ACD on which the location ID resides.
- 4. Select OK.

Supervisor displays the Dictionary Location IDs window.

Dictionary Location IDs	_ 🗆 X
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
Location Name:	
Location ID:	
Description:	
	test2

- 5. To find a location ID to view, only one of the fields requires a value to be specified. Perform one of the following actions to specify a location ID in the Dictionary:
  - In the Location Name: field, enter the name of the location.
  - In the Location ID: field, enter the number of the location.
- 6. From the Actions menu, select Find One.

Supervisor retrieves and displays the information for the specified location ID, if valid.

# Listing all location IDs

To list all location IDs defined in the Dictionary:

1. From the Controller Window, select **Commands** > **Dictionary**.

Supervisor displays the **Dictionary** window.

Dictionary			x
Operations	Reports	Ì	
Derations: ACD Groups ACDs Agent Groups Agent String Values Announcements AUX Reason Codes Calculations Calculations Call Work Codes			
ACD: SouthR11			▼ <u>H</u> elp
		OK	Cancel

- 2. In the **Operations:** list, highlight **Location IDs**.
- 3. In the **ACD**: field, enter the ACD on which the location IDs reside.
- 4. Select OK.

Supervisor displays the Dictionary Location IDs window.

Dictionary Location IDs	
Actions Edit Help	
Location Name:	
Location ID:	
Description:	
	test2

5. From the Actions menu, select List All.

## Modifying a location ID

To modify an existing location ID in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Operations	Reports		
Operations:	,		
ACD Groups		J	•
ACDs Agent Groups			
Agent String Values			
Announcements			
AUX Reason Codes			
Calculations Call Work Codes			<b>-</b>
,			_
ACD:			
SouthR11		•	
		Help	1
Script			
<u>S</u> cript		 	

2. In the Operations: list, highlight Location IDs.

- 3. In the ACD: field, enter the ACD on which the location ID resides.
- 4. Select OK.

Supervisor displays the Dictionary Location IDs window.

鶴 Dictionary Location IDs	
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
Location Name:	
Location ID:	
Description:	
	test2

- 5. To find a location ID to modify, only one of the fields requires a value to be specified. Perform one of the following actions to specify a location ID in the Dictionary:
  - In the Location Name: field, enter the name of the location.
  - In the Location ID: field, enter the number of the location.
- 6. From the Actions menu, select Find One.

Supervisor retrieves and displays the information for the specified location ID, if valid.

7. In the Location Name: field, enter the new name for the location.

8. From the Actions menu, select Add.

#### **Deleting a Location ID**

To remove a location ID from the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Dictionary Operations	Reports	)	<u>×</u>
Operations: ACD Groups ACDs Agent Groups Agent String Values Announcements AUX Reason Codes			
Calculations Call Work Codes			T
ACD: SouthR11			•
<u>S</u> cript			Help
		OK	Cancel

- 2. In the **Operations:** list, highlight **Location IDs**.
- 3. In the **ACD:** field, enter the ACD on which the location ID resides.
- 4. Select OK.

Supervisor displays the Dictionary Location IDs window.

Dictionary Location IDs	
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
Location Name:	
Location ID:	
Description:	
	test2

- 5. To find a location ID to delete, only one of the fields requires a value to be specified. Perform one of the following actions to specify a location ID in the Dictionary:
  - In the Location Name: field, enter the name of the location.
  - In the **Location ID:** field, enter the number of the location.

6. From the **Actions** menu, select **Find One**.

Supervisor retrieves and displays the information for the specified location ID.

7. From the **Actions** menu, select **Delete**.

The specified location ID is removed from the Dictionary.

# Login ID names

*CMS* uses agent login IDs to identify measured ACD agents. After an agent's name is assigned to a login ID, *CMS* windows and reports show that agent's login ID name instead of the login ID number.

You do not have to input agent names in the Dictionary, but *CMS* administration windows and reports are easier to understand with agent names instead of login IDs. Depending on the amount of space in the report, agent names can be truncated.

This section contains the following topics:

- Permissions on page 134
- Before you begin on page 134
- Adding a name to a login ID on page 135
- Viewing a login ID name on page 136
- Listing all login ID names on page 137
- <u>Modifying a login ID name</u> on page 138
- Deleting a login ID name on page 139

#### **Permissions**

Depending on the procedure that you want to perform, you need the following permissions:

- To view login IDs, you need read permissions for the Dictionary subsystem.
- To add, delete, or modify login IDs, you need *write* permissions for the Dictionary subsystem.

#### Before you begin

The following items should be read and understood before working with login ID names in the Dictionary:

- Login ID names are sorted alphabetically in the Dictionary based on the first character that you input in the Agent name: field.
   For example, if the agent is listed as Jane Brown, CMS sorts on the J for Jane. If the agent is listed as Brown, Jane CMS sorts on the B in Brown. Supervisor reports do not automatically sort by agent name, but the user can request the report to do so.
- You can assign no more than one agent name to the same login ID.

- You cannot assign the same agent name to multiple login IDs.
- You can use only numbers in login IDs.
- If you are viewing a real-time report when a change is made to a login ID that appears on that report, you must exit the report and rerun it to see the change.

#### Adding a name to a login ID

To add a name to a login ID in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Dictionary	2	· · ·			×
Operations	Reports				
Dperations:					
ACD Groups					
ACDs					
Agent Groups					
Agent String Values					
AUX Reason Codes Calculations					
Call Work Codes					<b>-</b>
Call WOR Codes					
ACD:					
SouthR11			•	•	
Carina I				11-1-	1
<u>S</u> cript				<u>H</u> elp	
		ПК		Cancel	1
				Carlcer	

- 2. In the **Operations:** list, highlight **Login Identifications**.
- 3. In the **ACD:** field, enter the ACD or ACD Group on which you want to assign a name to a login ID.
- 4. Select OK.

Supervisor displays the Dictionary Login Identifications window.

Dictionary Login Identifications	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
Login ID:	
Agent Name:	
	Bison36vpe

5. In the **Login ID:** field, enter the number of the login ID on which you want to assign a new name.

- 6. In the **Agent Name:** field, enter the name of the agent to be associated with the Login ID number.
- 7. From the Actions menu, select Add.

#### Viewing a login ID name

To view the information associated with an existing login ID name in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Dictionary			
Operations	Reports	Ì	
Operations:			
ACD Groups			<b></b> ⊾
ACDs Agent Groups			
Agent String Values			
Announcements			
AUX Reason Codes Calculations			
Call Work Codes			-
ACD:			
 SouthR11			•
<u>S</u> cript			Help
		OK	Cancel

- 2. In the **Operations:** list, highlight **Login Identifications**.
- 3. In the **ACD:** field, enter the ACD or ACD Group on which you want to view a login ID name.
- 4. Select OK.

Supervisor displays the Dictionary Login Identifications window.

t) Dictionary Login Identifications	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
Login ID:	
Agent Name:	
	Bison36vpe

- 5. To find a login ID to view, only one of the fields requires a value to be specified. Perform one of the following actions to specify a login ID in the Dictionary:
  - In the Login ID: field, enter the number of the login ID.

- In the Agent Name: field, enter the name of the agent.
- 6. From the Actions menu, select Find One.

Supervisor retrieves and displays the information for the specified login ID, if valid.

## Listing all login ID names

To list all login ID names defined in the Dictionary:

1. From the Controller Window, select **Commands** > **Dictionary**. *Supervisor* displays the **Dictionary** window.

Dictionary			x
Operations	Reports	Ì	
Derations: ACD Groups ACDs Agent Groups	-	_	-
Agent String Values Announcements AUX Reason Codes Calculations Call Work Codes			
,			_
ACD:			
SouthR11			•
<u>S</u> cript			Help
		OK	Cancel

- 2. In the **Operations:** list, highlight **Login Identifications**.
- 3. In the **ACD:** field, enter the ACD or ACD Group on which you want to list all login ID names.
- 4. Select OK.

Supervisor displays the Dictionary Login Identifications window.

t) Dictionary Login Identifications	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
Login ID: 📗	
Agent Name:	_
	Bison36vpe

5. From the Actions menu, select List All.

## Modifying a login ID name

To modify an existing login ID name in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Dictionary Operations	Reports	)		
Operations:	,	<b>I</b>		
ACD Groups ACDs Agent Groups Agent String Values Announcements AUX Reason Codes Calculations Call Work Codes				•
ACD:			-	
<u>S</u> cript			<u>H</u> elp	
		ΠΚ	Cancel	1

- 2. In the **Operations:** list, highlight **Login Identifications**.
- 3. In the **ACD:** field, enter the ACD or ACD Group on which you want to modify a login ID name.
- 4. Select OK.

Supervisor displays the Dictionary Login Identifications window.

Dictionary Login Identifications	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
Login ID:	
Agent Name:	_
	Bison36vpe

- 5. To find a login ID to modify, only one of the fields requires a value to be specified. Perform one of the following actions to specify a login ID in the Dictionary:
  - In the Login ID: field, enter the number of the login ID.
  - In the Agent Name: field, enter the name of the agent.
- 6. From the Actions menu, select Find One.

*Supervisor* retrieves and displays the information associated with the specified login ID name, if valid.

7. In the Agent Name: field, enter the modified name of the agent.

8. From the Actions menu, select Modify.

The specified login ID name and its changes are saved in the Dictionary.

## **Deleting a login ID name**

To delete an existing login ID name from the Dictionary:

1. From the Controller Window, select **Commands** > **Dictionary**.

Supervisor displays the Dictionary window.

Dictionary			x
Operations	Reports	Ì	
Operations: ACD Groups ACDs	_		<u> </u>
Agent Groups Agent String Values Announcements AUX Reason Codes			
Calculations Call Work Codes			<b></b>
ACD:			
SouthR11			
<u>S</u> cript			<u>H</u> elp
		OK	Cancel

- 2. In the **Operations:** list, highlight **Login Identifications**.
- 3. In the **ACD:** field, enter the ACD or ACD Group on which the login ID name to delete resides.
- 4. Select OK.

Supervisor displays the Dictionary Login Identifications window.

Dictionary Login Identifications	×
Actions Edit Help	
Login ID: 📗	
Agent Name:	-
	Bison36vpe

- 5. To find a login ID to delete, only one of the fields requires a value to be specified. Perform one of the following actions to specify a login ID in the Dictionary:
  - In the Login ID: field, enter the number of the login ID.
  - In the Agent Name: field, enter the name of the agent.

6. From the **Actions** menu, select **Find One**.

*Supervisor* retrieves and displays the information for the specified login ID name, if valid.

7. From the **Actions** menu, select **Delete**.

# Logout reason code names

Logout reason codes enable an agent to give the reason for logging out, such as attending training or the end of a shift. You can add, delete, modify, and view logout reason codes from the **Logout Reason Codes** window. The names that are assigned to the logout reason codes appear in the standard agent login/logout and agent trace historical reports.

This section contains the following topics:

- Permissions on page 141
- Before you begin on page 141
- <u>Adding a logout reason code name</u> on page 142
- <u>Viewing a logout reason code name</u> on page 143
- Listing all logout reason code names on page 144
- Modifying a logout reason code name on page 145
- <u>Deleting a logout reason code name</u> on page 147

#### Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view logout reason codes, you need *read* permissions for the Dictionary subsystem.
- To add, delete, or modify logout reason code, you need *write* permissions for the Dictionary subsystem.

#### Before you begin

- Logout reason codes are single digits, 0 through 9. A zero is used when the system logs an agent out or if the agent does not specify a code.
- Logout reason code names can be up to 20 characters long.
- To use logout reason codes, your switch must have the Expert Agent Selection (EAS) feature.

## Adding a logout reason code name

To add a logout reason code name in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Dictionary Operations	Reports		1		2
Operations:	P				
ACD Groups					
ACDs					
Agent Groups Agent String Values					
Agent string values Announcements					
AUX Reason Codes					
Calculations					
Call Work Codes					_
ACD:					
SouthR11				-	
Journa					
Script				<u>H</u> elp	
					=
		OK		Cancel	

- 2. In the Operations: list, highlight Logout Reason Codes.
- 3. In the **ACD:** field, enter the ACD or ACD Group on which you want to add a logout reason code.
- 4. Select OK.

Supervisor displays the Dictionary Logout Reason Codes window.

🏥 Dictionary Logout Reason Codes	×
<u>A</u> ctions <u>E</u> dit <u>H</u> elp	
Logout Reason Code name:	_
Logout Reason Code:	
Description:	
	Bison36vpe

- 5. In the **Logout Reason Code name:** field, enter the name of the new logout reason code.
- 6. In the **Logout Reason Code:** field, enter a number from 0 to 9 to be associated with the logout reason code name.

Any additional information about the logout reason code can be entered in the **Description:** field. Only 50 or fewer characters can be entered in this field.

7. From the Actions menu, select Add.

#### Viewing a logout reason code name

To view an existing logout reason code name in the Dictionary:

1. From the Controller Window, select **Commands** > **Dictionary**.

Supervisor displays the Dictionary window.

Operations	Reports	Ì	
Operations:			
ACD Groups			A
ACDs			
Agent Groups Agent String Values			_
Announcements			
AUX Reason Codes			
Calculations			
Call Work Codes			<u> </u>
ACD:			
SouthR11			<b>-</b>
Script			Help
<u></u>			
		ПК	Cancel

- 2. In the **Operations:** list, highlight **Logout Reason Codes**.
- 3. In the **ACD:** field, enter the ACD or ACD Group on which you want to view a logout reason code name.
- 4. Select OK.

Supervisor displays the Dictionary Logout Reason Codes window.

鶴 Dictionary Logout Reason Codes	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
Logout Reason Code name:	
Logout Reason Code:	
Description:	
	Bison36vpe

- 5. To find a logout reason code to view, only one of the fields requires a value to be specified. Perform one of the following actions to specify a logout reason code in the Dictionary:
  - In the **Logout Reason Code name:** field, enter the name of the logout reason code.
  - In the Logout Reason Code: field, enter a number from 0 to 9 that is associated with the logout reason code.

6. From the Actions menu, select Find One.

*Supervisor* retrieves and displays the information for the specified logout reason code name, if valid.

## Listing all logout reason code names

To list all existing logout reason code names in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Dictionary				×
Operations	Reports	Ì		
Operations:				
ACD Groups ACDs				
Agent Groups				
Agent String Values				
Announcements AUX Reason Codes				
Calculations				
Call Work Codes				<u> </u>
ACD:				
SouthR11			-	
Script			<u>H</u> elp	
				_
		OK	Cancel	

- 2. In the Operations: list, highlight Logout Reason Codes.
- 3. In the **ACD:** field, enter the ACD or ACD Group on which you want to view all logout reason code names.
- 4. Select OK.

Supervisor displays the Dictionary Logout Reason Codes window.

t角 Dictionary Logout Reason Codes	×
Actions Edit Help	
Logout Reason Code name:	
Logout Reason Code:	
Description:	
Bis	on36vpe

5. From the Actions menu, select List All.

Supervisor displays the Dictionary Logout Reason Codes - List All window.

Logout Reason Code Name	Code	Description	
.ogout A	1	End of shift	
Logout B	2	End of Training	
.ogout C	3	Taking a break	
Logout D	4	Doing paper work	
.ogout E	5	Down time	
Logout F	6		
.ogout G	7		
.ogout H	8		
Logout I	9		

#### Modifying a logout reason code name

To modify an existing logout reason code name in the Dictionary:

1. From the Controller Window, select **Commands** > **Dictionary**.

Dictionary				×
Operations	Reports	)		_
Operations:				
ACD Groups			<b>▲</b>	
ACDs				
Agent Groups Agent String Values				
Announcements				
AUX Reason Codes				
Calculations Call Work Codes			-1	
Lall Work Lodes				
ACD:				
SouthR11			-	
Joodanni				
<u>S</u> cript			<u>H</u> elp	L
		·····		
		OK	Cancel	

- 2. In the **Operations:** list, highlight **Logout Reason Codes**.
- 3. In the **ACD:** field, enter the ACD or ACD Group on which you want to modify a logout reason code name.

Supervisor displays the Dictionary Logout Reason Codes window.

🏥 Dictionary Logout Reason Codes	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
Logout Reason Code name:	
Logout Reason Code:	
Description:	
	Bison36vpe

- 5. To find a logout reason code to modify, only one of the fields requires a value to be specified. Perform one of the following actions to specify a logout reason code in the Dictionary:
  - In the Logout Reason Code name: field, enter the name of the logout reason code.
  - In the Logout Reason Code: field, enter the number from 0 to 9 that is associated with the logout reason code.
- 6. From the Actions menu, select Find One.

*Supervisor* retrieves and displays the information for the specified logout reason code name, if valid.

- 7. In the **Logout Reason Code name:** field, enter the new name for the logout reason code.
- 8. From the Actions menu, select Modify.

The specified logout reason code name and its changes are saved to the Dictionary.

#### Deleting a logout reason code name

To delete an existing logout reason code name from the Dictionary:

1. From the Controller Window, select **Commands** > **Dictionary**.

Supervisor displays the **Dictionary** window.

Dictionary					×
Operations	Reports		)		
Operations:					
ACD Groups					•
ACDs					
Agent Groups Agent String Values					
Agent String values Announcements					
AUX Reason Codes					
Calculations					_
Call Work Codes					•
ACD: SouthR11				×	
<u>S</u> cript				<u>H</u> elp	
		OK		Cancel	

- 2. In the Operations: list, highlight Logout Reason Codes.
- 3. In the **ACD:** field, enter the ACD or ACD Group on which the logout reason code name to delete resides.
- 4. Select OK.

Supervisor displays the Dictionary Logout Reason Codes window.

🏥 Dictionary Logout Reason Codes 🛛 🛛 🛛
<u>Actions</u> <u>E</u> dit <u>H</u> elp
Logout Reason Code name:
Logout Reason Code:
Description:
Bison36vpe

- 5. To find a logout reason code to delete, only one of the fields requires a value to be specified. Perform one of the following actions to specify a logout reason code in the Dictionary:
  - In the **Logout Reason Code name:** field, enter the name of the logout reason code.
  - In the **Logout Reason Code:** field, enter the number from 0 to 9 that is associated with the logout reason code.

6. From the Actions menu, select Find One.

*Supervisor* retrieves and displays the information for the specified logout reason code name, if valid.

7. From the **Actions** menu, select **Delete**.

The specified logout reason code name is removed from the Dictionary.

# Split/skill string values

Split/skill string values are the descriptive words used in the split/skill call profile reports in place of the split/skill numeric values. From the **Split/Skill String Values** window, you can change the default string values to correspond with your own requirements.

This section contains the following topics:

- Permissions on page 149
- Before you begin on page 149
- Viewing split/skill string values on page 150
- Modifying split/skill string values on page 151
- <u>Split/skill string value field descriptions</u> on page 152

#### Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view split/skill string values, you need *read* permissions for the Dictionary subsystem.
- To modify split/skill string values, you need write permissions for the Dictionary subsystem.

#### Before you begin

- If you assign values that are longer than the field lengths allowed on standard reports, those values are truncated to fit on the reports. Similar custom reports can be created to accommodate the longer string values.
- If you do not assign different values to the split/skill string values, the default values are used.

# Viewing split/skill string values

To view the string value for splits or skills in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

E

Dictionary				x
Operations	Reports	)		
Operations: ACD Groups ACDs Agent Groups Agent String Values Announcements AUX Reason Codes Calculations Calculations Call Work Codes				•
ACD: SouthR11			•	
<u>S</u> cript			Help	
		OK	Cancel	

- 2. In the Operations: list, highlight Split/Skill String Values.
- 3. In the **ACD:** field, enter the ACD or ACD Group on which you want to view the split/skill string values.
- 4. Select OK.

Supervisor displays the Dictionary Split/Skill String Values window.

Actions E	ary Split/Skill String Values dit <u>H</u> elp			_ 🗆 X
7	L			
Service	e Level Changed	Skill State		
YES:	YES	UNKNOWN:	UNKN	
NO:	NO	NORMAL:	NORMAL	
Period	Changed	OVERLOAD1:	OVRLD1	
YES:	YES	OVERLOAD2:	OVRLD2	
NO:	NO	BEHIND:	BEHIND	
		AUTORSV:	AUTORSV	
				ACD1

## Modifying split/skill string values

To modify the existing string values for splits or skills in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Dictionary					2
Operations	Reports		)		
Operations:					
ACD Groups					
ACDs					
Agent Groups Agent String Values					
Announcements					
AUX Reason Codes					
Calculations					
Call Work Codes					-
ACD: SouthR11				•	
					1
<u>S</u> cript				Help	
		OK		Cancel	

- 2. In the Operations: list, highlight Split/Skill String Values.
- In the ACD: field, enter the ACD or ACD Group on which you want to modify the split/ skill string values.
- 4. Select OK.

Supervisor displays the Dictionary Split/Skill String Values window.

t的 Dictionary Split/Skill String Values			_ 🗆 🗙
<u>A</u> ctions <u>E</u> dit <u>H</u> elp			
Service Level Changed	Skill State		
YES: YES	UNKNOWN:	UNKN	
NO: NO	NORMAL:	NORMAL	
Period Changed	OVERLOAD1:	OVRLD1	
YES: YES	OVERLOAD2:	OVRLD2	
NO: NO	BEHIND:	BEHIND	
	AUTORSV:	AUTORSV	
			ACD1

- Enter a new split/skill string value in each field that you want to modify.
   See <u>Split/skill string value field descriptions</u> on page 152 for more information.
- 6. From the Actions menu, select Modify.

The split/skill string values and their changes are saved to the Dictionary.

# Split/skill string value field descriptions

The following table describes the fields in the **Dictionary Split/Skill String Values** window:

Field	Description
Service Level Changed	The service level is the time limit in seconds for calls to wait in queue before being answered. The Split/Skill Call Profile reports can be used to see how many calls were either answered or abandoned within each service level increment.
	The string values in the following fields are displayed on the Split/ Skill Call Profile Report:
	<ul> <li>YES - The string value in this field will appear on the Split/Skill Call Profile Report if the service level in the split/skill call profile has changed.</li> <li>NO - The string value in this field will appear on the Split/Skill Call Profile Report if the service level in the split/skill call profile has not changed.</li> </ul>

Field	Description
Period Changed	There are ten time increments of administrable length in the real-time and historical Split/Skill Call Profile Reports.
	The string values in the following fields are displayed on the Split/ Skill Call Profile Report:
	<ul> <li>YES - The string value in this field will appear on the Split/Skill Call Profile if the time period in the split/skill call profile has changed.</li> <li>NO - The string value in this field will appear on the Split/Skill Call Profile if the time period in the split/skill call profile has not changed.</li> </ul>
Skill State	Skill states are used to specify states for the different skills.
	The string values in the following fields represent the following skill states:
	<ul> <li>UNKNOWN - Leave the default value. The default value is UNKN.</li> <li>NORMAL - Enter the descriptive word for the state of a skill using the Service Level Supervisor feature when it is below all overload thresholds. The default value is NORMAL.</li> <li>OVERLOAD1 - Enter the descriptive word for the state of a skill</li> </ul>
	using the Service Level Supervisor feature when it exceeds the first overload threshold. The default value is OVRLD1.
	<ul> <li>OVERLOAD2 - Enter the descriptive word for the state of a skill using the Service Level Supervisor feature when it exceeds both the first and second thresholds. The default value is OVRLD2.</li> </ul>
	<ul> <li>BEHIND - This string indicates that a split or skill is either close to or failing to meet the administered target service level and agents are not being auto-reserved to compensate for this situation. The default value for this string is BEHIND.</li> </ul>
	• AUTORSV - This string indicates that a split or skill is either close to or failing to meet the administered target service level and agents are currently being auto-reserved to achieve the necessary level. The default value for this string is AUTORSV.

# Split/Skill names

You can assign names to your ACD splits or skills. These split/skill names appear on the split/skill reports, making your reports easier to identify and read.

Split/skill names should reflect the configuration of your splits/skills and ACDs.

For example, if you want splits in your system to be divided according to Sales, Customer Service, and Wholesale, assign those names to the splits that handle those areas of the business. If you want skills in your system to be divided by language such as French, Spanish, and German, assign those names to the skills that handle calls in those languages.

This section contains the following topics:

- Permissions on page 154
- Before you begin on page 154
- <u>Adding a split/skill name</u> on page 155
- Viewing a split/skill name on page 156
- Listing all the split/skill names on page 157
- Modifying a split/skill name on page 158
- Deleting a split/skill name on page 159

#### Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view the name assigned to a split/skill, you need read permissions for the Dictionary subsystem and for the split/skill.
- To add, delete or modify the name assigned to a split/skill, you need *write* permissions for the Dictionary subsystem and for the split/skill.

### Before you begin

The following items should be read and understood before working with split/skill names in the Dictionary:

- It is advised that you be consistent with the names given by your switch administrator.
- If you assign a name, the split/skill number no longer appears in split/skill reports or windows. The split/skill name appears instead.

• If you make changes to split/skill names when viewing a report that includes those splits/skills, you must exit the report and rerun it to see the changes.

### Adding a split/skill name

To add a name for a split or skill in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Dictionary			x
Operations	Reports		
Operations:			
ACD Groups			
ACDs Agent Groups			
Agent String Values			
Announcements			
AUX Reason Codes Calculations			
Call Work Codes			<b>–</b>
ACD:			
SouthR11			<b>_</b>
Joodanni			
<u>S</u> cript			Help
		OK	Cancel

- 2. In the **Operations:** list, highlight **Splits/Skills**.
- 3. In the ACD: field, enter the ACD or ACD Group on which you want to name a split/skill.
- 4. Select OK.

Supervisor displays the Dictionary Splits/Skills window.

鶴 Dictionary Splits/Skills
<u>Actions</u> <u>Edit</u> <u>H</u> elp
₽ Z Y < ¬> E A
Split/Skill name:
Split/Skill number:
Description:
Bison36vpe

- 5. In the Split/Skill name: field, enter the name of the split/skill.
- 6. In the Split/Skill number: field, enter the number of the split/skill.

Any additional information about the split/skill can be entered in the **Description:** field. Only 50 or fewer characters can be entered in this field. 7. From the Actions menu, select Add.

### Viewing a split/skill name

To view an existing name for a split or skill in the Dictionary:

From the Controller Window, select Commands > Dictionary.
 Supervisor displays the Dictionary window.

Operations	Reports	)		
Operations:	,			
ACD Groups ACDs Agent Groups Agent String Values Announcements AUX Reason Codes Calculations Calculations Call Work Codes				▲ ▼
ACD: SouthR11			•	
<u>S</u> cript			Help	
			Canc	. 1

- 2. In the Operations: list, highlight Splits/Skills.
- 3. In the ACD: field, enter the ACD or ACD Group on which you want to view a split/skill.
- 4. Select OK.

Supervisor displays the Dictionary Splits/Skills window.

創 Dictionary Splits/Skills	X
<u>Actions</u> <u>Edit</u> <u>H</u> elp	
Split/Skill name:	
Split/Skill number:	
Description:	
	Bison36vpe

- 5. To find a split/skill to view, only one of the fields requires a split/skill to be specified. Perform one of the following actions to specify an existing split/skill in the Dictionary:
  - In the Split/Skill name: field, enter the name of the split/skill.
  - In the Split/Skill number: field, enter the number of the split/skill.

6. From the Actions menu, select Find One.

Supervisor retrieves and displays the information for the specified split/skill name, if valid.

# Listing all the split/skill names

To list the names for all splits or skills in the Dictionary:

1. From the Controller Window, select **Commands** > **Dictionary**.

Supervisor displays the Dictionary window.

Dictionary			x
Operations	Reports	)	
Derations: ACD Groups ACDs Agent Groups Agent String Values Announcements AUX Reason Codes Calculations Calculations Calculations			×
ACD: SouthR11			⊻ <u>H</u> elp
		OK	Cancel

- 2. In the **Operations:** list, highlight **Splits/Skills**.
- 3. In the **ACD:** field, enter the ACD or ACD Group on which you want to view all split/skill names.
- 4. Select OK.

Supervisor displays the Dictionary Splits/Skills window.

館 Dictionary Splits/Skills 🛛 🗙
<u>Actions</u> <u>E</u> dit <u>H</u> elp
Split/Skill name:
Split/Skill number:
Description:
Bison36vpe

5. From the Actions menu, select List All.

# Modifying a split/skill name

To modify an existing name for a split or skill in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Dictionary				x
Operations	Reports	]		
Derations: ACD Groups ACDs Agent Groups Agent String Values Announcements AUX Reason Codes Calculations Calculations Call Work Codes				
ACD: SouthR11			▼ <u>H</u> elp	
		OK OK	Cancel	

- 2. In the Operations: list, highlight Splits/Skills.
- 3. In the **ACD:** field, enter the ACD or ACD Group on which you want to modify the split/ skill name.
- 4. Select OK.

Supervisor displays the Dictionary Splits/Skills window.

t角 Dictionary Splits/Skills	×
<u>Actions Edit H</u> elp	
Split/Skill name:	
Split/Skill number:	
Description:	_
	_
	Bison36vpe

- 5. To find a split/skill to modify, only one of the fields requires a split/skill to be specified. Perform one of the following actions to specify an existing split/skill in the Dictionary:
  - In the Split/Skill name: field, enter the name of the split/skill.
  - In the Split/Skill number: field, enter the number of the split/skill.
- 6. From the Actions menu, select Find One.

Supervisor retrieves and displays the information for the specified split/skill name, if valid.

- 7. In the Split/Skill name: field, enter the new name of the split/skill.
- 8. From the Actions menu, select Modify.

The split/skill name and its changes are saved to the Dictionary.

## Deleting a split/skill name

To delete the name for a split or skill in the Dictionary:

From the Controller Window, select Commands > Dictionary.
 Supervisor displays the Dictionary window.

Operations	Reports			
Operations: ACD Groups	,			
ACDs Agent Groups Agent String Values				
Announcements AUX Reason Codes Calculations				
Call Work Codes				Ľ
ACD:				
SouthR11			•	
<u>S</u> cript			<u>H</u> elp	
		OK	Cancel	1

- 2. In the Operations: list, highlight Splits/Skills.
- 3. In the **ACD:** field, enter the ACD or ACD Group on which the split/skill name to delete resides.
- 4. Select OK.

Supervisor displays the Dictionary Splits/Skills window.

盦 Dictionary Splits/Skills	X
Actions Edit Help	
Split/Skill name:	
Split/Skill number:	
Description:	
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- 5. To find a split/skill to delete, only one of the fields requires a split/skill to be specified. Perform one of the following actions to specify an existing split/skill in the Dictionary:
  - In the Split/Skill name: field, enter the name of the split/skill.

- In the Split/Skill number: field, enter the number of the split/skill.
- 6. From the Actions menu, select Find One.

*Supervisor* retrieves and displays the information for the specified split/skill name, if valid.

7. From the **Actions** menu, select **Delete**.

The split/skill name is removed from the Dictionary.

# Standard database items

Standard database items store ACD data and are used by CMS in its default reports.

You cannot change or delete standard database items because this is a *read-only* section of the Dictionary. You can view the standard information about each database item, the description for that item, and the tables in which the item appears.

The following example shows a current real-time agent table with standard *CMS* database item column headings:

Extension	Split	Logid	Logon start	Work mode	Started	Direction	Changed	>*
1000	1	4000	8:00	AVAIL	8:00	NULL	8:00	>
1001	1	5966	7:58	ACD	8:04	IN	8:04	>
1002	1	2200	7:59	ACD	8:03	IN	8:03	>
	-							>

Note:

>\* indicates that more database item column headings follow. A dot (.) indicates that more data follows down the table.

This section contains the following topics:

- Permissions on page 161
- Viewing a standard database item on page 162
- <u>Viewing all standard database items alphabetically</u> on page 163

### Permissions

To view the standard database items, you need *read* permissions for the Dictionary subsystem.

## Viewing a standard database item

To view a standard database item in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Operations	Reports	```	)		
Operations: ACD Groups ACDs Agent Groups		_		_	
Agent String Values Announcements AUX Reason Codes Calculations					
Call Work Codes					-
ACD:					
SouthR11				-	
<u>S</u> cript				<u>H</u> elp	
		OK		Cancel	

- 2. In the Operations: list, highlight Standard CMS Items.
- 3. Select OK.

Supervisor displays the Dictionary Standard CMS Items window.

鶞 Dictionary Standard C	MS Items	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp		
	.]	
Database item:		
Description:		
Table:		

4. In the **Database item:** field, enter the name of the database item entirely in uppercase letters.



If you do not know the entire database item name, enter part of the database item name along with an asterisk (\*) to find the item. You can use pattern searching in any field in the window.

You can also enter information in the **Table:** field to limit the search of a database item to a single table.

5. From the Actions menu, select Find One.

*Supervisor* retrieves and displays the information for the specified standard database item, if valid.

#### Note:

If you used pattern matching in your search for a standard database item, it is possible that more than one match was found. To view the next database item that matches the search parameter, select **Next** from the **Actions** menu. Continue to select **Next** until the appropriate database item is found.

#### Viewing all standard database items alphabetically

To view all standard database items in the Dictionary:

1. From the Controller Window, select **Commands** > **Dictionary**.

Supervisor displays the Dictionary window.

Dictionary				×
Operations	Reports	)		
Operations:				
ACD Groups ACDs Agent Groups Agent String Values Announcements AUX Reason Codes Calculations Calculations Call Work Codes				
ACD:				
<u>S</u> cript			<u>H</u> elp	
		(OK	Cancel	1

- 2. In the **Operations:** list, highlight **Standard CMS Items**.
- 3. Select OK.

Supervisor displays the Dictionary Standard CMS Items window.

🏥 Dictionary Standard	i CMS Items 🛛 🔀
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
	1
Database item:	
Description:	
Table:	

4. From the Actions menu, select List All.

# Trunk group names

The **Trunk Groups** window is used to assign names to ACD trunk groups. The trunk groups names appear in reports making the reports easier to understand.

This section contains the following topics:

- Permissions on page 164
- Before you begin on page 164
- Adding a trunk group name on page 165
- Viewing a trunk group name on page 166
- Listing all trunk group names on page 167
- Modifying a trunk group name on page 168
- Deleting a trunk group name on page 169

#### **Permissions**

Depending on the procedure that you want to perform, you need the following permissions:

- To view the name that is assigned to a trunk group, you need *read* permissions for the Dictionary subsystem and for the trunk group.
- To add, delete, or modify the name assigned to a trunk group, you need *write* permissions for the Dictionary subsystem and for the trunk group.

# Before you begin

The following items should be read and understood before working with trunk groups names in the Dictionary:

- When naming trunk groups, you may want to be consistent with the names given to trunk groups and splits/skills by your switch administrator.
- If you assign a trunk group name, the name is displayed on trunk group reports or windows instead of the trunk group number.
- If you make changes to trunk group names while viewing a report that includes those trunk groups, you must exit the report and rerun it to see the changes.

# Adding a trunk group name

To add a trunk group name to the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the **Dictionary** window.

Operations	Reports			
Operations:	P			
ACD Groups				
ACDs Agent Groups				
Agent String Values				
Announcements				
AUX Reason Codes				
Calculations Call Work Codes				Ţ
Call Work Codes				
ACD:				
SouthR11			 -	
Jouunnii				
Script			<u>H</u> elp	
		[		_
			Cancel	

- 2. In the **Operations:** list, highlight **Trunk Groups**.
- 3. In the **ACD:** field, enter the ACD on which you want to name a trunk group.
- 4. Select OK.

Supervisor displays The Dictionary Trunk Groups window.

創 Dictionary Trunk Groups	×
Actions Edit Help	
Trunk group name:	
Trunk group number:	
Description:	
Bis	on36vpe

- 5. In the **Trunk group name:** field, enter the name of the trunk group.
- 6. In the **Trunk group number:** field, enter the number of the trunk group.

Any additional information about the trunk group can be entered in the **Description:** field. Only 50 or fewer characters can be entered in this field.

7. From the **Actions** menu, select **Add**.

# Viewing a trunk group name

To view an existing trunk group name in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Operations	Reports	)		
Operations: ACD Groups ACDs Agent Groups Agent String Values Announcements		_	و 	
AUX Reason Codes Calculations Call Work Codes				J
ACD: SouthR11			•	
<u>S</u> cript			<u>H</u> elp	
		ОК	Cancel	

- 2. In the Operations: list, highlight Trunk Groups.
- 3. In the **ACD**: field, enter the ACD on which you want to view a trunk group name.
- 4. Select OK.

Supervisor displays the Dictionary Trunk Groups window.

創 Dictionary Trunk Groups	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
Trunk group name:	_
Trunk group number:	
Description:	
	Bison36vpe

- 5. To find a trunk group to view, only one of the fields requires a trunk group to be specified. Perform one of the following actions to specify an existing trunk group in the Dictionary:
  - In the **Trunk group name:** field, enter the name of the trunk group.
  - In the **Trunk group number:** field, enter the number of the trunk group.
- 6. From the Actions menu, select Find One.

Supervisor retrieves and displays the information for the specified trunk group, if valid.

# Listing all trunk group names

To list all trunk group names in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the **Dictionary** window.

Dictionary Operations	Reports	)		
Operations:				
ACD Groups ACDs Agent Groups Agent String Values Announcements AUX Reason Codes Calculations Call Work Codes				•
ACD:				
· · · · · · · · · · · · · · · · · · ·				-
<u>S</u> cript			Help	
		OK	Cancel	1

- 2. In the **Operations:** list, highlight **Trunk Groups**.
- 3. In the **ACD**: field, enter the ACD on which you want to list all trunk group names.
- 4. Select OK.

Supervisor displays the Dictionary Trunk Groups window.

創 Dictionary Trunk Groups	X
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
◆ ℤ § <b>/ ħ / E 1</b>	
Trunk group name:	
Trunk group number:	
Description:	
1	
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5. From the Actions menu, select List All.

# Modifying a trunk group name

To change the name or description of a trunk group in the Dictionary:

1. From the Controller Window, select **Commands** > **Dictionary**.

Supervisor displays the Dictionary window.

Dictionary				x
Operations	Reports	)		
Derations: ACD Groups ACDs Agent Groups Agent String Values Announcements AUX Reason Codes Calculations Calculations Call Work Codes			×	
ACD: SouthB11			•	
<u>S</u> cript			Help	
		OK	Cancel	

- 2. In the Operations: list, highlight Trunk Groups.
- 3. In the **ACD**: field, enter the ACD on which you want to modify a trunk group name.
- 4. Select OK.

Supervisor displays the Dictionary Trunk Groups window.

Dictionary Trunk Groups	X
Actions Edit Help	
Trunk group name:	
Trunk group number:	
Description:	
	Bison36vpe

- 5. To find a trunk group to modify, only one of the fields requires a trunk group to be specified. Perform one of the following actions to specify an existing trunk group in the Dictionary:
  - In the **Trunk group name:** field, enter the name of the trunk group.
  - In the **Trunk group number:** field, enter the number of the trunk group.
- 6. From the Actions menu, select Find One.

Supervisor retrieves and displays the information for the specified trunk group, if valid.

- 7. In the **Trunk group name:** or **Description** field, make the necessary changes for the trunk group.
- 8. From the Actions menu, select Modify.

#### Deleting a trunk group name

To remove a name for a trunk group from the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Dictionary			x
Operations	Reports	Ì	
Operations: ACD Groups			
ACDs Agent Groups Agent String Values Announcements AUX Reason Codes Calculations Calculations Call Work Codes			
ACD: SouthR11			
<u>S</u> cript			<u>H</u> elp
		OK	Cancel

- 2. In the **Operations:** list, highlight **Trunk Groups**.
- 3. In the **ACD**: field, enter the ACD on which the trunk group to delete resides.
- 4. Select OK.

Supervisor displays the Dictionary Trunk Groups window.

t角 Dictionary Trunk Groups	X
<u>A</u> ctions <u>E</u> dit <u>H</u> elp	
Trunk group name:	_
Trunk group number:	
Description:	
	Bison36vpe

- 5. To find a trunk group to delete, only one of the fields requires a trunk group to be specified. Perform one of the following actions to specify an existing trunk group in the Dictionary:
  - In the **Trunk group name:** field, enter the name of the trunk group.

#### Using the Dictionary to name contact center entities

- In the **Trunk group number:** field, enter the number of the trunk group.
- 6. From the **Actions** menu, select **Delete**.

The selected trunk group name is removed from the Dictionary.

# **Trunk string values**

Trunk string values are the descriptive words such as IDLE, HOLD, or QUEUED on trunk reports. These words are displayed in the data fields of the report. They are not displayed as headings. From the **Trunk String Values** window, the default values can be changed to any values that meet the needs of your contact center. If you do not assign different trunk string values, the default values are used. Any changes that you make to the trunk string values affect what you see in the corresponding fields on trunk reports.

This section contains the following topics:

- Permissions on page 171
- Viewing and modifying trunk string values on page 172
- Trunk string values field descriptions on page 173

#### **Permissions**

Depending on the procedure that you want to perform, you need the following permissions:

- To view the trunk string values, you need *read* permissions for the Dictionary subsystem.
- To modify a trunk string value, you need *write* permissions for the Dictionary subsystem.

# Viewing and modifying trunk string values

To view and modify trunk string values in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Supervisor displays the Dictionary window.

Dictionary			2	×
Operations	Reports	Ì		
Operations: ACD Groups ACDs Agent Groups Agent String Values Announcements AUX Reason Codes Calculations Calculations Call Work Codes			* *	
ACD:				l
SouthR11			<b>-</b>	l
<u>S</u> cript			Help	
		OK	Cancel	

- 2. In the **Operations:** list, highlight **Trunk String Values**.
- 3. Select OK.

Supervisor displays the Dictionary Trunk String Values window.

🏥 Dictionary Tru	unk String Values		x
<u>Actions</u> <u>E</u> dit <u>H</u> e	lp		
	Trunk State		Call Priority (non-vectoring)
IDLE:	IDLE	YES:	YES
SEIZED:	SEIZED	NO:	NO
QUEUED:	QUEUED		Call Priority (vectoring)
CONN:	CONN	LOW:	LOW
DABN:	DABN	MED:	MED
FBUSY:	FBUSY	HIGH:	HIGH
FDISC:	FDISC	TOP:	TOP
HOLD:	HOLD		
MBUSY:	MBUSY		Call Direction
RINGING:	RINGING	IN:	IN
UNKNOWN:	UNKNOWN	OUT:	TUO
	Queue Type		All Trunks Busy
MAIN:	MAIN	YES:	YES
BACKUP:	BACKUP	NO:	NO
			Bison36vpe

4. To change any of the default names, enter the new descriptive word in the text box that is next to the name that you want to change.

See <u>Trunk string values field descriptions</u> on page 173 for more information on the fields in the **Dictionary Trunk String Values** window.

5. From the **Actions** menu, select **Modify** when the necessary changes have been completed.

# Trunk string values field descriptions

Field	Description
Trunk State	<ul> <li>To change any of the trunk state default names, enter the new descriptive word next to any of the following:</li> <li>IDLE - The trunk is waiting for a call.</li> <li>SEIZED - A call is holding the trunk, either incoming or outgoing.</li> <li>QUEUED - An ACD call has seized the trunk, is queued to a split/ skill, and is waiting for an agent to become available.</li> <li>CONN - The caller and an agent are connected on a call.</li> <li>DABN - The caller has abandoned the call.</li> <li>FBUSY - The caller receives a forced busy signal.</li> <li>FDISC - The caller receives a forced disconnect.</li> <li>HOLD - The agent has put the caller on hold.</li> <li>MBUSY - The trunk is out of service for maintenance purposes.</li> <li>RINGING - The call is ringing at an agent's voice terminal.</li> <li>UNKNOWN - CMS does not recognize the trunk state.</li> </ul>
Queue Type	<ul> <li>To change the queue type default names, enter the new descriptive name next to MAIN or BACKUP. The name entered here is displayed instead of the default value in real-time reports containing the trunk QUETYPE database item. (Standard reports do not contain this item).</li> <li>MAIN - The call is queued to a split/skill as a result of a queue to main split/skill vector command.</li> <li>BACKUP - The call is queued to a split/skill as a result of a vector command other than queue to main split/skill.</li> </ul>
Call Priority (Non-Vectoring)	<ul> <li>To change the call priority (non-vectoring) default names, enter the new descriptive name next to YES or NO. The name entered here is displayed instead of the default name in real-time reports containing the trunk PRIORITY database item. (Standard reports do not contain this item.)</li> <li>YES - The call occupying the trunk has priority entering the trunk.</li> <li>NO - The call occupying the trunk does not have priority entering the split.</li> </ul>

The following table describes the trunk string value fields:

Field	Description
Call Priority (Vectoring)	<ul> <li>To change the call priority (vectoring) default names, enter the new descriptive name next to LOW, MED, HIGH, or TOP. The priority level at which calls on a trunk queue to a split/skill is specified using either the queue to split/skill or check split/skill command in the vector that is processing the call. The name entered here is displayed instead of the default name in real-time reports containing the trunk PRIORITY database item. (Standard reports do not contain this item).</li> <li>LOW - The call occupying the trunk is queued to a split or skill at the lowest priority level.</li> <li>MED - The call occupying the trunk is queued to a split or skill at the second lowest priority level.</li> <li>HIGH - The call occupying the trunk is queued to a split or skill at the second highest priority level.</li> </ul>
Call Direction	<ul> <li>To change the call-direction default names, enter the new descriptive word next to IN or OUT.</li> <li>IN - The trunk is on an incoming call.</li> <li>OUT - The trunk is on an outbound call.</li> </ul>
All Trunks Busy	<ul> <li>To change the all trunks busy default names, enter the new descriptive word next to YES or NO.</li> <li>YES - All trunks in the trunk group are busy (in use or maintenance).</li> <li>NO - Not all trunks in the trunk group are busy.</li> </ul>

# VDN names

From the **VDNs** window, you can assign names to VDNs so that names instead of numbers appear on VDN reports and VDN administration windows. VDN names should reflect the configuration of your ACD and convey one or more of the following:

- The VDN's purpose; for example, sales or customer service.
- The VDN destination vector; for example, FBusy-Nat.Accts.
- The trunk groups assigned to the VDN; for example, WATS 800-331-1111.

This section contains the following procedures:

- Permissions on page 175
- Before you begin on page 175
- Adding a VDN name on page 176
- <u>Viewing a VDN name</u> on page 177
- Listing all VDN names on page 178
- Modifying a VDN name on page 179
- <u>Deleting a VDN name</u> on page 180

### Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view the name that is assigned to a VDN, you need read permissions for the Dictionary subsystem and for the VDN.
- To add, delete, or modify the name that is assigned to a VDN, you need write permissions for the Dictionary subsystem and for the VDN.

#### Before you begin

The following items should be read and understood before working with VDN names in the Dictionary:

- The VDNs window is available only if the Call Vectoring feature is installed and activated on your switch.
- VDNs must be created on the switch and assigned for measurement via CMS.

- To get a list of VDNs that can be named, run the vector configuration report. While all VDNs can be named, it is recommended that only those VDNs that are used are then named instead of all of the VDNs. This will conserve system resources.
- If you make changes to the VDN names when a report that includes those VDNs is running, you must exit the report and rerun it to see the changes.
- When naming VDNs, you may want to be consistent with the names given to VDNs by your switch administrator.
- If a name is assigned to a VDN, it will appear on VDN reports and windows instead of the VDN number.

## Adding a VDN name

To add a name for a VDN in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

,	
	Help

- 2. In the **Operations:** list, highlight **VDNs**.
- 3. In the ACD: field, enter the ACD on which you want to name a VDN.

Supervisor displays the Dictionary VDNs window.

創 Dictionary VDNs	X
<u>A</u> ctions <u>E</u> dit <u>H</u> elp	
◆ ℤ ኝ <b>҂ ヽ ∧</b> E <b>1</b>	
VDN name:	1
VDN:	
Description:	
	Bison36vpe

- 5. In the VDN name: field, enter the name of the VDN.
- 6. In the VDN: field, enter the number of the VDN.

Any additional information about the VDN, can be entered in the **Description:** field. Only 50 or fewer characters can be entered in this field.

7. From the Actions menu, select Add.

# Viewing a VDN name

To view an existing VDN name in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Dictionary				
Operations	Reports		)	
Operations:				
ACD Groups				<b>▲</b>
ACDs				
Agent Groups Agent String Values				
Announcements				
AUX Reason Codes				
Calculations				
Call Work Codes				<b>_</b>
ACD:				
SouthR11				<b>-</b>
<u>S</u> cript				Help
		OK		Cancel

- 2. In the **Operations:** list, highlight **VDNs**.
- 3. In the ACD: field, enter the ACD on which you want to view a VDN.

Supervisor displays the Dictionary VDNs window.

創 Dictionary VDNs	x
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
VDN name:	
VDN:	
Description:	
	Di
	Bison36vpe

- 5. To find a VDN name to view, only one of the fields requires a VDN to be specified. Perform one of the following actions to specify an existing VDN in the Dictionary:
  - In the VDN name: field, enter the name of the VDN.
  - In the VDN: field, enter the number of the VDN.
- 6. From the Actions menu, select Find One.

Supervisor retrieves and displays the information for the specified VDN name, if valid.

#### Listing all VDN names

To list all defined VDN names in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Dictionary				×
Operations	Reports	)		
Operations:	, ,			
ACD Groups				
ACDs				
Agent Groups Agent String Values				
Announcements				
AUX Reason Codes				
Calculations Call Work Codes				<b>-</b> 1
I Call WORK CODES				-
ACD:				
SouthR11			•	
Script			Help	
<u>ə</u> onpt				
		OK	Cancel	

- 2. In the **Operations:** list, highlight **VDNs**.
- 3. In the **ACD:** field, enter the ACD on which you want to view all the VDNs.

Supervisor displays the Dictionary VDNs window.

創 Dictionary VDNs	×
<u>Actions</u> <u>Edit</u> <u>H</u> elp	
VDN name:	_
VDN:	
Description:	
	Bison36vpe

5. From the Actions menu, select List All.

# Modifying a VDN name

To modify the name or description of an existing VDN in the Dictionary:

 From the Controller Window, select Commands > Dictionary. Supervisor displays the Dictionary window.

Dictionary				×
Operations	Reports	Ì		_
Derations: ACD Groups ACDS Agent Groups Agent String Values Amouncements AUX Reason Codes Calculations Call Work Codes			•	
ACD: SouthR11			▼ <u>H</u> elp	
		OK	Cancel	

- 2. In the **Operations:** list, highlight **VDNs**.
- 3. In the ACD: field, enter the ACD on which you want to modify the name of a VDN.

Supervisor displays the Dictionary VDNs window.

創 Dictionary VDNs	X
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
VDN name:	
VDN:	
Description:	
	Bison36vpe
	Disonoovpe

- 5. To find a VDN name to modify, only one of the fields requires a VDN to be specified. Perform one of the following actions to specify an existing VDN in the Dictionary:
  - In the VDN name: field, enter the name of the VDN.
  - In the VDN: field, enter the number of the VDN.
- 6. From the Actions menu, select Find One.

Supervisor retrieves and displays the information for the specified VDN name, if valid.

- 7. In the VDN name: or Description: field, make the necessary changes.
- 8. From the Actions menu, select Modify.

# **Deleting a VDN name**

To delete the name of a VDN from the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Dictionary			×
Operations	Reports	)	
Operations:			
ACD Groups ACDs Agent Groups Agent String Values Announcements AUX Reason Codes Calculations Call Work Codes			
<u>A</u> CD: SouthR11			•
<u>S</u> cript			Help
		OK	Cancel

- 2. In the **Operations:** list, highlight **VDNs**.
- 3. In the **ACD:** field, enter the ACD on which the VDN to delete resides.
- 4. Select OK.

Supervisor displays the Dictionary VDNs window.

盦 Dictionary VDNs	×
Actions Edit Help	
VDN name:	
VDN:	
Description:	
	Bison36vpe

- 5. To find a VDN name to delete, only one of the fields requires a VDN to be specified. Perform one of the following actions to specify an existing VDN in the Dictionary:
  - In the VDN name: field, enter the name of the VDN.
  - In the VDN: field, enter the number of the VDN.
- 6. From the Actions menu, select Find One.

Supervisor retrieves and displays the information for the specified VDN, if valid.

7. From the Actions menu, select Delete.

The name and description for this VDN is removed from the Dictionary.

## **Vector names**

From the **Vectors** window, you can assign names to vectors so that the names instead of the vector numbers are displayed on vector reports and administration windows. Vector names should reflect the configuration of your ACD and convey one or more of the following:

- The vector's purpose; for example, sales or customer service.
- The VDNs assigned to the vector; for example, vdn2001, vdn3001, and vdn4001.
- The splits or skills to which the vector sends calls; for example, sales1, sales2, AUDIX system.

This section contains the following topics:

- Permissions on page 182
- Before you begin on page 182
- Adding a vector name on page 183
- <u>Viewing a vector name</u> on page 184
- Listing all vector names on page 185
- Modifying a vector name on page 186
- <u>Deleting a vector name</u> on page 187

### Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view the name that is assigned to a vector, you need *read* permissions for the Dictionary subsystem and for the vector.
- To add, delete, or modify the name that is assigned to a vector, you need write permissions for the Dictionary subsystem and for the vector.

### Before you begin

The following items should be read and understood before working with vector names in the Dictionary:

 The Vectors window is available only if the Call Vectoring feature is installed and activated on the switch.

- You can assign a name to a vector even if the steps to the vector have not been assigned.
- The number of available vectors depends on the switch type.
- If a name is assigned to a vector, it appears on reports and windows instead of the vector number.
- If you make changes to vector names when a report that includes those vectors is running, you must exit the report and rerun it to see the changes.

### Adding a vector name

To add a name for a vector in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Dictionary Operations	Reports	١		
Operations:	1	I		
ACD Groups				
ACDs				
Agent Groups				
Agent String Values				
Announcements AUX Reason Codes				
Calculations				
Call Work Codes				-
ACD:				
SouthR11			-	
Joodannin				
Script			Н	elp
		ПК	T Ca	ncel
		<u>.</u>		

- 2. In the **Operations:** list, highlight **Vectors**.
- 3. In the **ACD**: field, enter the ACD on which you want to name a vector.

Supervisor displays the Dictionary Vectors window.

Dictionary Vectors	X
Actions Edit Help	
Vector name:	
Vector number:	
Description:	
	Bison36vpe

- 5. In the Vector name: field, enter the name of the vector.
- 6. In the Vector number: field, enter the number of the vector.

Any additional information about the vector, can be entered in the **Description:** field. Only 50 or fewer characters can be entered in this field.

7. From the Actions menu, select Add.

### Viewing a vector name

To view an existing name for a vector in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Dictionary				×
Operations	Reports	Ì		
Operations:				
ACD Groups ACDs Agent Groups Agent String Values Announcements AUX Reason Codes Calculations Call Work Codes				
ACD: SouthB11			×	
<u>S</u> cript			<u>H</u> elp	
		OK	Cancel	

- 2. In the Operations: list, highlight Vectors.
- 3. In the **ACD:** field, enter the ACD on which you want to view a vector name.

Supervisor displays the Dictionary Vectors window.

Dictionary Vectors	×
Actions Edit Help	
Vector name:	_
Vector number:	
Description:	
	Bison36vpe

- 5. To find a vector name to view, only one of the fields requires a vector to be specified. Perform one of the following actions to specify an existing vector in the Dictionary:
  - In the Vector name: field, enter the name of the vector.
  - In the Vector number: field, enter the number of the vector.
- 6. From the Actions menu, select Find One.

Supervisor retrieves and displays the information for the specified vector, if valid.

### Listing all vector names

To list all vector names defined in the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Dictionary	<b>N a</b>			2
Operations	Reports			
Operations:				
ACD Groups				
ACDs				
Agent Groups Agent String Values				
Announcements				
AUX Reason Codes				
Calculations				
Call Work Codes				<b>_</b>
ACD:				
SouthR11			-	
·			_	
<u>S</u> cript			<u>H</u> elp	
		2		=
		OK OK	Cancel	

- 2. In the Operations: list, highlight Vectors.
- 3. In the ACD: field, enter the ACD on which you want to list all vector names.

Supervisor displays the Dictionary Vectors window.

創 Dictionary Vectors	X
<u>A</u> ctions <u>E</u> dit <u>H</u> elp	
Vector name:	
Vector number:	
Description:	
	Bison36vpe

5. From the Actions menu, select List All.

## Modifying a vector name

To change the current name or description of a vector in the Dictionary:

From the Controller Window, select Commands > Dictionary.
 Supervisor displays the Dictionary window.

Dictionary	Departs			×
Operations	Reports			
Operations:				
ACD Groups			A	1
ACDs				1
Agent Groups				1
Agent String Values Announcements				
AUX Reason Codes				
Calculations				
Call Work Codes			-	
ACD:				
SouthR11				
SouthRIT			<u> </u>	
<u>S</u> cript			Help	
		OK	Cancel	I

- 2. In the **Operations:** list, highlight **Vectors**.
- 3. In the **ACD:** field, enter the ACD on which you want to modify a vector name.

Supervisor displays the Dictionary Vectors window.

Dictionary Vectors	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
Vector name:	_
Vector number:	
Description:	
	Diser 20 ma
	Bison36vpe

- 5. To find a vector name to modify, only one of the fields requires a vector to be specified. Perform one of the following actions to specify an existing vector in the Dictionary:
  - In the Vector name: field, enter the name of the vector.
  - In the Vector number: field, enter the number of the vector.
- 6. From the Actions menu, select Find One.

Supervisor retrieves and displays the information for the specified vector, if valid.

- 7. In the Vector name: or Description: field, make the necessary changes.
- 8. From the Actions menu, select Modify.

### Deleting a vector name

To remove the name for a vector in the Dictionary:

1. From the Controller Window, select **Commands** > **Dictionary**.

Dictionary				x
Operations	Reports	Ì		
Operations:				
ACD Groups			<b>▲</b>	
ACDs Agent Groups				
Agent String Values				
Announcements				
AUX Reason Codes Calculations				
Call Work Codes			-	
,				
ACD:				
SouthR11			•	
Script			Help	L
		OK	Cancel	

- 2. In the **Operations:** list, highlight **Vectors**.
- 3. In the ACD: field, enter the ACD on which the vector name to delete resides.
- 4. Select OK.

Supervisor displays the Dictionary Vectors window.

創 Dictionary Vectors	×
Actions Edit Help	
Vector name:	
Vector number:	
Description:	
	Bison36vpe

- 5. To find a vector name to delete, only one of the fields requires a vector to be specified. Perform one of the following actions to specify an existing vector in the Dictionary:
  - In the Vector name: field, enter the name of the vector.
  - In the Vector number: field, enter the number of the vector.
- 6. From the Actions menu, select Find One.

Supervisor retrieves and displays the information for the specified vector, if valid.

7. From the **Actions** menu, select **Delete**.

The name for this VDN is removed from the Dictionary.

# **Dictionary reports**

In the **Dictionary** window, use the **Reports** tab to generate reports on most sections of the Dictionary. These reports can be printed, sent to a file, or displayed on the screen.

This section contains the following topics:

- Permissions on page 189
- Printing Dictionary reports on page 189
- <u>Running an agent group members report</u> on page 191

### **Permissions**

To obtain a report, you need *read* permissions for the Dictionary subsystem.

## **Printing Dictionary reports**

To print Dictionary reports:

1. From the Controller Window, select Commands > Dictionary.

Dictionary					x
Operations	Reports		1		
Operations:					
ACD Groups					
ACDs					
Agent Groups Agent String Values				-	
Announcements					
AUX Reason Codes					
Calculations Call Work Codes					-1
I Call WORK CODES				-	-
ACD:					
SouthR11				-	
Journali					
Script				<u>H</u> elp	
		OK		Cancel	

2. Select the **Reports** tab.

Supervisor displays the **Reports** window.

Dictionary			? >
Operations	Reports	)	
<u>R</u> eports:			
ACDs			<b>_</b>
Agent Group Members Agent Groups			
Call Work Codes			
Custom Items			
Login Identifications Splits/Skills			
Standard CMS Items			
ACD:			
ST10			▼
<u>S</u> cript			<u>H</u> elp
		01	
		OK	Cancel

- 3. In the **Reports** list, select the Dictionary item on which you want to generate a report.
- 4. Select OK.

Supervisor displays a report window.

創ACDs			_ 🗆 ×
Destination • Miew Report on Screen			
C Print Report on:		ddops3	4
	OK	Cancel	<u>H</u> elp
			acd6

- 5. Select one of the following options:
  - View Reports on Screen
  - Print Report on:

To send the report to a printer other than the default printer in the report window, select **Print Report on:** and then select the printer button on the right side of the report window. Select the new printer from the **Print** window.

Depending on the option that you selected, the report is either sent to a printer or displayed on the screen.

The following is an example of screen output:

ACDs Report Ed	it <u>F</u> ormat	<u>I</u> ools	<u>O</u> ptions	Help		
	Name			ACD	Description	
3T10			1			
3T11			2			
T12			3			
3T13			4			
	To Run For					

### Running an agent group members report

As an example, the following procedure describes the steps used to run an agent group members report from the Dictionary:

1. From the Controller Window, select **Commands > Dictionary**.

Dictionary					×
Operations	Reports		)		
Operations:					
ACD Groups ACDs					-
Agent Groups Agent String Values					
Announcements					
AUX Reason Codes Calculations					
Call Work Codes					-
ACD:					
SouthR11				•	
· · · · · · · · · · · · · · · · · · ·					-11
<u>Script</u>				Help	
		OK		Cancel	

2. Select the **Reports** tab.

Supervisor displays the **Reports** window.

Dictionary			? >
Operations	Reports		
<u>R</u> eports:			
ACDs Agent Group Members Agent Groups Call Work Codes Custom Items Login Identifications Splits/Skills Standard CMS Items			
			_
ACD: ST10			•
<u>S</u> cript			Help
		OK	Cancel

- 3. In the Reports list, select Agent Group Members.
- 4. Select OK.

Supervisor displays the Dictionary Agent Groups window.

創 Dictionary Agent Groups	
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
� ≶ ₽ <u> </u>	
Agent group name:	
Create a new group from an existing one	TSO_120

- 5. In the **Agent group name:** field, enter the name of the agent group, and then press the **Enter** key.
- 6. Select one of the following options:
  - View Reports on Screen
  - Print Report on
- 7. Select OK.

Depending on the option that you selected, the report is either sent to a printer or displayed on the screen.

. . . . .

# **Chapter 4: Using reports**

This section describes *Supervisor* reports and provides procedures in generating and administrating them. The procedures are general in scope so as to provide usability for all reports run through the **Reports** subsystem. For more information on specific reports and usage, see the *Avaya CMS Supervisor Installation and Getting Started* and *Avaya CMS Supervisor Reports* manuals.

*CMS* collects data from ACD activity and stores it in one of the *CMS* databases. The data reflects the activity of your contact center and can be viewed through *CMS* reports that cover such areas as:

- Splits/Skills
- Trunks
- Trunk Groups
- Agents
- Agent Groups
- VDNs
- Vectors

This section contains the following topics:

- Background on page 194
- Choosing a report on page 196
- Generating a report on page 198
- Printing a report on page 199
- Printing a Historical report on page 200
- Changing the print setup on page 200
- Restarting a report on page 201

# Background

Reports consist of standard reports, custom reports, and designer reports. Standard reports are shipped as part of the *CMS* system. Custom reports are created by contact center administrators through the *CMS* ASCII interface. Designer Reports are created through *Supervisor*.

See the Avaya CMS Custom Reports and Avaya CMS Supervisor Report Designer User Guide manuals for more information on creating custom and designer reports.

This section includes the following topics:

- Interfaces for reports on page 194
- Types of reports on page 194
- What reports summarize on page 195

### Interfaces for reports

The following list displays which interfaces are used in the creation of reports and which ones can be used for viewing these reports:

- Most standard reports can also be viewed through the CMS ASCII interface. The exceptions to this are the Supervisor integrated reports, reports containing charts, and others.
- Custom reports are created through the CMS ASCII interface, but can be viewed through both the CMS ASCII interface and Supervisor.
- Designer reports can only be created and viewed through Supervisor.

## **Types of reports**

The following types of reports can be generated:

- Standard real-time
- Standard historical
- Standard integrated
- Custom (CMS) real-time
- Custom (CMS) historical
- Designer (Supervisor) real-time

- Designer (Supervisor) historical
- Designer (Supervisor) integrated
- Exceptions
- Forecast (available as an add-on feature)

### What reports summarize

Use CMS/Supervisor reports to summarize the status of:

- Any measured subset of the ACD, including agents, splits/skills, trunks/trunk groups, VDNs, vectors, call work codes, and call records
- Agent administration
- Contact center administration
- Dictionary
- Exceptions
- Maintenance

# **Choosing a report**

Most reports are found in the **Reports** subsystem found under the **Commands** item on the menu bar. This section provides the general procedure for running reports in this subsystem. Reports may be run by selecting the **Real-Time**, **Historical**, or **Integrated** tab from the **Select a Report** window.

Other reports are available on the **Reports** tab found on the main window of the following subsystems:

- Dictionary
- Exceptions
- Agent Administration
- Call Center Administration
- Maintenance

The reports for the subsystems listed above are not available in the main Reports interface.

Procedures on running reports through the areas other than the **Reports** subsystem are covered in their respective chapters. The following procedures provide information on working with reports from the **Reports** subsystem.

### Steps

To run a report from the **Reports** system.

1. Select Commands > Reports from the Controller Window.

Supervisor displays the Select a Report window.

Select a Report     Real-Time	Historical	Y	ntegrated	)	? ×
Run Report for <u>ACD</u> : test <u>Category:</u> Argent Other Queue/Agent Split/Skill Trank/Trank Group VDN Vector CMS custom		Report:	Report t		
Shows status of agents	: in an agent group, ar	nd reason for AUX .	agents		
<u>S</u> cript		<u>P</u> roperties	Сору	<u>D</u> elete	Help
	[	OK	Edit	New	Cancel

- 2. Determine the type of report to be run by select the appropriate tab: **Real-Time**, **Historical**, or **Integrated**.
- 3. From the **Run Report for ACD:** field, select the ACD to serve as the data source for the report.
- 4. Select a category from the Category field.
- 5. Select a report from the **Report** field.
- 6. Select OK.

*Supervisor* displays a report input window similar to the example below. The input fields vary according to the report and its type.

(.{Agent Group Report	
- Inputs-	
Agent Group:	
	-
Real-Time Options	
Refresh Every 45 Seconds	
Enable Report <u>I</u> hresholds	
🗖 Run <u>M</u> inimized	
OK Cancel	Help
	test

To continue this process, see the following section, <u>Generating a report</u> on page 198.

# **Generating a report**

Once a report type has been selected by following the previous procedure, information must be entered to define the parameters of the report.

- 1. To specify an object for the report, such as an agent, vector, VDN, and so forth, perform one of the following actions:
  - Manually enter the name or number of the object for the report.
  - Select the Browse button to view available objects.
  - Select the History list to select an input used previously.
- 2. Select OK to run the report with the specified object.

The type of report selected is displayed with information related to the object that was specified.

	elp				
Login ID	Extn	AUX Reason	State	Split/Skill Time	VDN Name
50005	0005		AVAIL		
50002	0002		AVAIL	49:25	
	Login ID 50005 50001 50004 50003 50006	Login ID Extn 50005 0005 50001 0001 50004 0004 50003 0003 50006 0006	Login ID Extn AUX Reason 50005 0005 50001 0001 50004 0004 50003 0003 50006 0006	Login ID Extn AUX Reason 50005 0005 AVAIL 50001 0001 AVAIL 50004 0004 AVAIL 50003 0003 AVAIL 50006 0006 AVAIL	Login ID Extn AUX State Split/Skill Time Reason 50005 0005 AVAIL 11:25 50001 0001 AVAIL 8:08 50004 0004 AVAIL 6:54 50003 0003 AVAIL 3:05 50006 0006 AVAIL 2:25

# **Printing a report**

Once a report has been generated, a Real-Time or Integrated report can be printed. To print a Real-time or Integrated report:

1. Select **Reports > Print** from the menu bar of the report window.

Windows displays the Print window opens.

Print		? ×
Printer —		
<u>N</u> ame:	ddops3	Properties
Status:	Default printer; Ready	
Type:	QMS 1725 Print System	
Where:	\\druak\ddops3	_
Comment		F Print to file
Print range	,	Copies
• <u>A</u> I		Number of <u>c</u> opies: 1 🚔
C Page	: from: to:	
O <u>S</u> elec	tion	112233  ☐ Collate
		OK Cancel

2. Select the printer and options for this report:

- Select the printer destination by selecting a printer in the Name drop-down list box.
- Select the number of copies of this report to be printed in the **Number of copies** field.
- Use the **Properties** button to change options specific to the selected printer. This could include image resolution, orientation, and other options.
- 3. Select OK.

The report is printed based on the options selected.

To print a report to a file on the local system, place a check mark in the **Print to file** check box. Set the printer to *Generic/Text Printer*. Failing to select the *Generic/Text Printer* will cause the **Print to file** check box to be ignored and the report is sent to the selected printer.

# **Printing a Historical report**

Once a report has been generated, a Historical report can be printed using two different methods:

- 1. Follow the steps listed in <u>Generating a report</u> on page 198 and <u>Printing a report</u> on page 199.
- 2. When specifying an object, such as an agent, vector, VDN, and so forth, for a report, the **Destination** group of controls can be seen on the lower half of the dialog box. This allows the report to be viewed on the screen or sent to the printer specified. Selecting the printer button in this area will allows specification of a different printer as well as setting all printer and print job options. This button is not available on Real-time and Integrated reports.

# Changing the print setup

Once a report has been printed to the screen, the settings for margins, page numbering, and table borders can be altered. To change the current print setup:

1. Select **Reports > Page Setup** from the report window menu bar.

Supervisor displays the Page Setup dialog box.

Page Setup	? ×
18	ifect how all reports will be creen is not affected.
Margins (inches)	Page Numbers
Lop: [1.00 <u>B</u> ottom: 1.00 Left: [.53 <u>B</u> ight: [.53	© Yes © № Box Around Tables © Box © Ng Box
ОК	Cancel <u>H</u> elp

- 2. Select the settings for page margins, page numbers, and table borders, as needed.
- Select OK to save these settings. The new settings will be applied to the next report that is printed.

# **Restarting a report**



Work-state drill-down reports cannot be restarted.

To restart a report once it is running on the screen, perform the following steps:

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

The report window closes and the input window that is used to specify the object of the report is displayed again.

2. Enter the requested information in the input window and select OK.

*Supervisor* displays the report window with the newly updated information for the selected object.

Using reports

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# **Chapter 5: Scripting CMS operations**

Scripting enables the automation of tasks such as running reports, exporting report data, and other operations.

This section contains the following topics:

- <u>Before you begin</u> on page 203
- Tasks scripts can automate on page 204
- Interactive and automatic scripts on page 204
- <u>Creating scripts</u> on page 205
- <u>Scripting other Supervisor operations</u> on page 212
- Error and warning messages on page 217

## Before you begin

Before a script can be run through *Supervisor*, the following conditions must be met:

- The username associated with an automatic script must be assigned all the permissions required for all operations specified by the script.
- No more than four scripting *Supervisor* sessions, including background sessions initiated by automatic scripts, can be run simultaneously on a PC.
- The PC must be running at the time when an automatic script is scheduled to run.
- Once a script is created, it can be started by accessing the script file directly from a Microsoft Windows Explorer window.
- Due to PC-related issues, it is strongly recommended that mission-critical activities, such as backups, be scheduled through Timetables on the *CMS* server. For more information about Timetable scheduling, see <u>Creating and scheduling a timetable</u> on page 621.

# Tasks scripts can automate

Scripts can be used to automate several CMS tasks, such as:

- Running reports
- Exporting data from reports
- Performing Dictionary operations and reports
- Administering Exceptions and requesting Exception reports
- Performing Agent Administration operations
- Performing Call Center Administration operations and reports
- Performing System Setup operations
- Performing Maintenance operations and viewing the Error Log
- Administering User Permissions

# Interactive and automatic scripts

Each script is designated to be either interactive or automatic, as defined below:

- An interactive script runs in the current *Supervisor* session and the actions display on the PC. If the *Supervisor* session is disconnected from the *CMS* server, the script will not run.
- An automatic script launches a new *Supervisor* session that logs into *CMS* and runs the requested tasks as a background process. Script actions are not displayed on the screen. Although *Supervisor* provides the ability to create automatic scripts, a third-party scheduling program must be used in order to run the scripts automatically on a regular schedule.

# **Creating scripts**

This section describes how to create interactive or automatic scripts used to run reports. Interactive and automatic scripts used to run reports have the following differences:

- An *interactive* script runs in the current *Supervisor* session and the actions display on the PC. If the Supervisor session is disconnected from the *CMS* server, the script will not run.
- An *automatic* script launches a new *Supervisor* session that logs into *CMS* and runs the requested tasks as a background process. Script actions are not displayed on the screen. Although *Supervisor* provides the ability to create automatic scripts, a third-party scheduling program must be used in order to run the scripts automatically on a regular schedule.

This section contains the following topics:

- Accessing scripts on page 205
- Accessing the script options on page 206
- Creating an interactive report script on page 207
- Creating an automatic report script on page 208
- Creating a script to export report data on page 209
- Creating a script to export report data as HTML on page 210

### Accessing scripts

Scripts can be created and accessed through the **Scripts** button found on several dialog boxes. Dialog boxes containing the **Scripts** button can be accessed through the following menu selections:

- Commands > Reports
- Commands > Dictionary
- Commands > Exceptions
- Commands > Agent Administration
- Commands > Call Center Administration
- Tools > System Setup
- Tools > Maintenance
- Tools > User Permissions

Scripts can also be accessed from agent administration windows or once a report is run. The **Script** button is also available when you use any other *Supervisor* command or tool that allows you to add or change objects.

### Accessing the script options

Before you create scripts, you should be aware of the different options and behaviors available for scripts.

To access script options:

1. Select **Tools > Options** from the menu bar on the Controller Window.

Supervisor displays the Options dialog box.

Organize Scri	ipts		? ×
	Organize your scripts us	sing the file list below.	
<u>F</u> older:	C Scripts	- E 🖻 🖃	
िंड Agent Gro िंड List Agenl	oups.cvsup ts Traced.cvsup		
	e scripts and/or folders using D at, CTRL-C to Copy, CTRL-V to	rag-and-Drop or the clipboard fur	lose nctions:

2. Select the Scripting tab.

The **Scripting** dialog provides the fields required to set the scripting options, which includes:

- User ID This read only ID allows automatic scripts to make their connection to the CMS server. The login ID and password are not validated until an automatic script is run.
- Logging Level The extent to which script-related activities and outputs are logged, according to the following criteria:
- **Minimum** Logged activities are limited to those errors and messages from *Supervisor* which would otherwise be displayed when the scripts are run manually.
- Normal Logged activities include those recorded at the Minimum setting, plus the following information: task start time; task end time; name of the script.
- Maximum Logged activities include all those recorded at Minimum and Normal settings, plus additional error messages which may be useful for debugging a script.

- Log File: Path Allows you to specify a non-default file directory path. Selecting the folder icon to the right of this field also lets you browse the file system to select a log file directory.
- Log File: Size Allows you to specify the size of the log file before it rolls over and begins to overwrite itself.

### Creating an interactive report script

To create an interactive script used to run a report:

1. Select **Commands** > **Reports** from the Controller Window menu bar.

*Supervisor* displays the **Reports** window.

Select a Report	Historical	ì	Integrated		? ×
Run Report for ACD:       test       Category:       Agant       Other       Queue/Agent       Split/Skill       Trunk/Trunk Group       VDN       Vector       CMS custom       Description       Shows status of agents in		Beport:	p Report ort iformation		
<u>S</u> cript	[	<u>P</u> roperties	Сору	Delete	Help
	[	OK	<u>E</u> dit	New	Cancel

- Select the tab associated with the type of report you want to run (Real-Time, Historical, or Integrated), and then highlight the report from the categories and listings which are displayed.
- 3. Select the **Script** button on the report selector window.

Supervisor displays the Save as Script window.

4. Select a directory and file name for the script and select **Save**.

*Supervisor* closes the **Save as Script** window and returns you to the report selector window.

## Creating an automatic report script

To create an automatic script used to run a report:

1. Select **Commands > Reports** from the Controller Window menu bar.

*Supervisor* displays the **Reports** window.

Select a Report	1 Historical	ĩ	ntegrated		? X
Run Report for <u>A</u> CD: test <u>Category:</u> <u>Acent</u> Other Queue/Agent Split/Skill Trunk/Trunk Group VDN VEctor CMS custom Description		Report: Agent Group Agent Repor	Report t ormation		
Shows status of agents in	an agent group, an	d reason for AUX -	agents		
<u>S</u> cript		<u>P</u> roperties	Сору	Delete	Help
		ОК	Edit	New	Cancel

2. To select a report for scripting, select the appropriate report type from the dialog box tabs (Real-Time, Historical, or Integrated), highlight the report, and select **OK**.

Supervisor displays the input window for the selected report.

3. Enter the appropriate data in the input window and run the report by selecting **OK**.

Supervisor displays the selected report.

(	ls <u>O</u> ptions <u>H</u> el	þ					_ 🗆 ×
<u>R</u> estart							
Page Setup							
<u>P</u> rint Print Pre⊻iew	Login ID	Extn	AUX Reason	State	Split/Skill		VDN Name
Design	44121	42121		RINGING	52	:21	
	44127	42127		RINGING	53	:22	
Save as <u>H</u> TML	44123	42123		RINGING	53	:28	
S <u>c</u> ript	44124	42124		RINGING	53	:19	
	44125	42125		RINGING	53	:34	
E <u>x</u> it	44126	42126		RINGING	51	:38	
Double Click to Run Real Tim	ie Agent Informati	on		Thresh	iolds: On	Bison3	6vpe //.

### Note:

If a historical report was selected, set the **Destination** controls to **View Report on Screen**.

4. In the dialog displayed for the report, select **Reports** > **Script** from the main menu.

Supervisor displays the Save as Script window.

- 5. Select a directory and file name for the script. The file type is set to *automatic* by default.
- 6. Select Save.

Executing this automatic script causes the report to run with the inputs provided during its creation.

### Creating a script to export report data

To create a script that exports report data to the clipboard or a specified file:

1. Run a report and display it to screen. See <u>Choosing a report</u> on page 196 for this procedure.

Supervisor displays the window for the selected report.

- 2. From the Edit menu of the report window, select one of the following actions:
  - Export Chart Data
  - Export Table Data

### • Export All Data

The data export dialog box is displayed. The dialog that is displayed will vary according to which export option is selected.

Export All Data				? ×
Destination				
<ul> <li>Export to Clipt</li> <li>Export to File:</li> </ul>	poard			
			•	2
Export Format				
F	ield Se <u>p</u> arator:	(tab)	•	
	<u>T</u> ext Delimiter:	(none)	•	
Export Null Va	s and Headers	nds		
ОК	Cancel	<u>S</u> cript		<u>H</u> elp

Some of these options can also be selected from a pop-up menu by performing a right-click in the report window.

3. Set the appropriate options in the data export dialog, and then select the **Script** button.



Do not select **OK** after the options are selected.

Supervisor displays the Save as Script window.

- 4. Select a directory and file name for the script, and set the file type to either **Interactive** or **Automatic**.
- 5. Select Save.

### Creating a script to export report data as HTML

To create a script that saves a Supervisor report as an HTML file:

Select a report that you want to export as HTML and display it to the screen.
 For more information, see <u>Choosing a report</u> on page 196.

Supervisor displays the report window.

From the menu bar of the report window, select Reports > Save As HTML.
 Supervisor displays the Save As HTML window.

Save As HTML ? 🗙
This window allows you to save a snapshot of the report output as an HTML file.
_ Template
You can use a template to provide formatting characteristics for your report, such as a background pattern, logos, or explanatory text.
C Do not use a template
<ul> <li><u>Choose an existing HTML file to use as a template</u></li> </ul>
e:\centrevu\samples\sample1.htm
Output
C Use the web browser default fonts
Specify the name of the HTML output file to be created
e:\centrevu\saveasdef.htm
OK Cancel <u>S</u> cript <u>H</u> elp

3. Select the appropriate option from the **Template** group.

A template can be used to provide company logos, background color, specific fonts, or surrounding text to the HTML file. If you do not select a template, the export process generates basic HTML tags to display the report.

*Supervisor* provides you with several templates that can be found in the **samples** directory of the main *Supervisor* directory.

- 4. In the Output field, select a name for the HTML file you are creating. To save the file in a directory other than the current directory, specify a full file path, such as c:\temp\myrpt.htm. You may also use the browse button located to the right of this field to navigate to a target directory.
- 5. Select the Script button.

Supervisor displays the Save as Script window.

- 6. Select a directory and file name for the script, and set the file type to either **Interactive** or **Automatic**.
- 7. Select Save.

If there are charts associated with the file, they are converted into .GIF files. After the HTML is saved, you can move or copy it and all associated graphics files to a web server directory for viewing on the Internet or an Intranet.

# **Scripting other Supervisor operations**

This section provides information on the procedures used to create and save scripts for actions not associated with reports.

This section contains the following topics:

- Actions not associated with reports on page 212
- Scripting an input window on page 212
- Scripting an action on page 214
- Organizing scripts on page 216

### Actions not associated with reports

Actions not associated with reports include:

- Displaying an input window for actions, not reports, requiring data entry when the script is run.
- An Add, Modify, or Delete action

### Scripting an input window

This procedure describes how to create a script that displays an input window for a specific, non-report operation. Executing the script displays the input window for the operation selected when this script was created.

### Actions captured in a script

Actions associated with the following functions can be captured in a script:

- Dictionary
- Exceptions
- Maintenance
- System Setup
- Agent Administration
- Call Center Administration

### Steps

To create a script for an input window:

1. Select the necessary item from the **Commands** menu on the Controller Window.

Supervisor displays the associated selector window for the item selected.

🖗 Agent Administratio	n			? :	×
Operations	Reports		)		
Operations:					L
Activate Agent Trace Change Agent Skills					L
List Agents Traced					L
Multi-Ägent Skill Chang	e				L
					L
					L
					L
					L
					L
ACD:					L
ST10					L
Script				Help	L
<u>s</u> enpc					
		ОК		Cancel	

### **A** Important:

Do not double-click the option or press the **Enter** key when an operation is highlighted or the action will be initiated and the script recording will be aborted.

 Highlight the operation to be made into a script from the **Operations**: list on the **Operations** tab of the selector window and then select the **Script** button in the selector window.

Supervisor displays the Save as Script window.

The file type is set to **Interactive** by default.

3. Complete the **Save as Script** window by entering a file name and folder location and then select **Save** when finished.

*Supervisor* displays an acknowledgment message to indicate that the script has been saved.

4. Select the **OK** button on the acknowledgment message box.

Supervisor closes the Save as Script window and the selector window remains open.

### Scripting an action

Use this procedure to create a script that results in the execution of an action. Running the saved script will cause an **Add**, **Modify**, **Delete**, or **No action** action to be performed for the selected operation.

To script a Supervisor action:

- 1. Select the necessary item from the **Commands** menu on the Controller Window. Valid items for scripting an action include:
  - Dictionary
  - Exceptions
  - Maintenance
  - System Setup
  - Agent Administration
  - Call Center Administration

Supervisor displays the selector window associated with the selected item.

2. Highlight the operation to be made into a script from the **Operations:** list on the **Operations** tab of the selector window.

Agent Administration	? ×
Operations Reports	
Operations:	
Activate Agent Trace Change Agent Skills	
List Agents Traced	
Multi-Ägent Skill Change	
U	
400	
ACD: ST10	
·	
<u>S</u> cript	<u>H</u> elp
	JK Cancel
	Cancer

3. Select the **OK** button.

Supervisor displays the input window for the selected operation.

4. Select **Actions** > **Script** from the menu bar of the input window. If none of the valid scriptable actions, **Add**, **Modify**, or **Delete**, are present, you cannot select **Script**.

Supervisor displays the Save as Script - Action window.

📽 Save as Script - Action 🔹 ? 🗙
Select one of the following actions to be saved in the script.
Action
● Add
O Modify
C <u>D</u> elete
○ No action - save only window contents and position
OK Cancel <u>H</u> elp

- 5. Select the action to be performed by the script.
- 6. Select the **OK** button.

Supervisor displays the Save as Script window.

### Note:

If the **Cancel** button is selected, *Supervisor* dismisses this window and displays the input window without saving an action.

- 7. In the **Save as Script** window, select a file folder location and file name.
- 8. Specify the script type as either **Automatic** or **Interactive**.
- 9. Select Save.

*Supervisor* displays an acknowledgment message box stating that the script has been saved.

10. Select the **OK** button on the acknowledgment message box

Supervisor displays the Save as Script - Action window.

## **Organizing scripts**

The **Organize Scripts** window provides a simple file management interface which allows you to rename, delete or move script files.

To organize existing Supervisor scripts:

1. Select Scripts > Organize Scripts... from the menu bar on the Controller Window.

Supervisor displays the Organize Scripts window.

Organize Scripts 🛛 🛛 🔀 🔀
Organize your scripts using the file list below. Eolder: Scripts I I I I I I I I I I I I I I I I I I I
Register         Help         Close           You may move scripts and/or folders using Drag-and-Drop or the clipboard functions: CTRL-X to Cut, CTRL-C to Copy, CTRL-V to Paste

- 2. Perform actions on the scripts as needed. This can include renaming, deleting, and moving.
- 3. When you are finished organizing scripts, select **Close** to exit the **Organize Scripts** window.

# Error and warning messages

This section lists possible error messages which may be encountered when running scripts and describes their associated causes and possible solutions:

Message	Reason	Solution
This script will not run unless a <i>CMS</i> login ID and password have been specified.	The <i>CMS</i> login ID and password have not been set on the <b>Scripting</b> tab of the <b>Controller Options</b> window.	Specify a login ID and password on the <b>User Information</b> window.
Automatic scripts are set to run with the permissions of another user of the PC.	The <b>User Information</b> window designates the other user as the owner of automatic scripts.	You can change the permissions via the login information on the <b>Scripting</b> tab of the <b>Options</b> window for the Controller Window. The change will apply to subsequent automatic scripts that are run on the PC.
(Action) <i>Supervisor</i> displays the <b>Save as</b> <b>Script: Add</b> or <b>Replace</b> window.	The file already exists.	<ul> <li>Select one of the following actions at the bottom of the window:</li> <li>Add (default) - Adds the new script to the end of the existing script</li> <li>Replace - Deletes the existing script and create a new script file</li> <li>Cancel - Closes the Add or Replace window and returns to the Save as Script window</li> <li>Help - Displays the help topic for the current window.</li> </ul>

Scripting CMS operations

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# Chapter 6: Administering contact center agents

This section provides information on using the Agent Administration window.

The items on the **Agent Administration** menu vary depending on the type of switch that *Call Management System* (*CMS*) is connected to and the features that are activated on the switch. These procedures include instructions for administering agents in an Automatic Call Distribution (ACD) with and without the Expert Agent Selection (EAS) feature.

This section contains the following topics:

- <u>Starting or stopping an agent trace</u> on page 220
- <u>Viewing current agent trace states</u> on page 223
- Listing agents traced on page 225
- <u>Changing agent skills</u> on page 227
- Changing skills for multiple agents on page 234
- <u>Changing extension split assignments</u> on page 238
- Moving extensions between splits on page 241
- <u>Running a split members report</u> on page 244

# Starting or stopping an agent trace

This section provides the procedure for starting and stopping the tracing of agents. Tracing an agent records the activities of the agent, state changes, and time when these events occurred. The agent trace report displays this information when it is run. The agent trace report can help you to evaluate how well agents use their time.

## Before you begin

The following items should be read and understood before working with agent traces:

- Traces can be activated for a maximum of 400 agents at a time across all ACDs from one *CMS* server. This maximum does not take into account whether or not the agents are logged in. It also applies to the number of agents who are administered and traced by one server across all ACDs. To avoid compromising performance, activate only the traces that you need.
- A maximum of 500,000 agent trace records can be stored. The oldest record is discarded and overwritten by the newest record when the file reaches the allocated maximum number of records.
- Turning a trace off does not delete the trace records for that agent. Agent trace records are overwritten automatically when the trace file reaches the maximum number of allocated records.
- The settings in the **Data Storage Allocation** window determine the maximum number of agent trace records that *CMS* can record. See <u>Data Storage Allocation</u> on page 469 for more information on this window.
- Starting and stopping agent traces requires that the Data Collection feature is currently activated.
- An agent trace must be started before the Agent Trace report can be run.
- Scripts can open and use the Activate Agent Trace window. You can also schedule the script. See <u>Chapter 5: Scripting CMS operations</u> on page 203, for more information on scripting.
- The Activate Agent Trace window can be set on a timetable. See <u>Chapter 13: Using</u> <u>timetables and shortcuts</u> on page 619, for more information.

## Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To start or stop an agent trace, the user ID used to log in to this *Supervisor* session requires *write* permission for the Agent Administration subsystem.
- To view an agent trace report, the user ID used to log in to this *Supervisor* session requires *read* permission for the Reports subsystem.

## Steps

1. From the Controller Window, select **Commands** > **Agent Administration**.

Supervisor displays the Agent Administration window.

On Communication Manager systems with EAS:

Agent Administration				? >
Operations	Reports		)	
Operations:				
Activate Agent Trace Change Agent Skills				
List Agents Traced				
Multi-Ägent Skill Change				
1				
100				
ACD:				
ST10				
Script				Help
		OK		Cancel

On Communication Manager systems without EAS:

Agent Administration		? ×
Operations Reports	Ì	
Operations:		
Activate Agent Trace Change Extension Split Assignments List Agents Traced		
Move Extensions Between Splits		
ACD:		
ST11		
Script		Help
	ОК	Cancel

- 2. In the **Operations:** list, highlight **Activate Agent Trace**.
- 3. In the **ACD** drop-down list, select the ACD on which the agent trace will be run or is currently running.

## 4. Select OK.

Supervisor displays the Activate Agent Trace window.

E Activate Agent Trace	
Actions Edit Help	
Agent names or logids:	
Agent trace:	
O On	
• Off	
	test

5. In the **Agent names or logids:** field, enter the names or login IDs of the agents who are to be traced or are being traced.

This field can accept multiple values. Multiple values must be separated by a semicolon (;).

Using the Browse button to the right of this field will only display those agents that have synonyms assigned to them through the Dictionary.

- 6. Perform one of the following actions for the Agent trace: options:
  - To start an agent trace, select **On**.
  - To stop an agent trace that is currently running, select Off.
- 7. Select **Actions > Modify** from the menu bar to start or stop the agent trace.

The status bar displays **Working** and then, if successful, displays **Successful** when the operation finishes.

# Viewing current agent trace states

This section provides the procedure for viewing all agent traces that are set to either **On** or **Off**.

To view all On or Off agent traces:

1. From the Controller Window, select **Commands > Agent Administration**.

Supervisor displays the Agent Administration window.

On Communication Manager systems with EAS:

🖗 Agent Administra	tion			? ×
Operations	Reports		Ì	
Operations:				
Activate Agent Trace Change Agent Skills List Agents Traced Multi-Agent Skill Char				
	-			
1				
400				
ACD: ST10				
<u>S</u> cript				Help
		OK		Cancel

On Communication Manager systems without EAS:

Agent Administration		? ×
Operations Reports	Ì	
Operations:		
Activate Agent Trace Change Extension Split Assignments List Agents Traced		
Move Extensions Between Splits		
,		
ACD:		
STII		
<u>S</u> cript		<u>H</u> elp
	ОК	Cancel

- 2. In the Operations: list, highlight Activate Agent Trace.
- In the ACD drop-down list, select the ACD on which the agent trace will be run or is currently running.

## 4. Select OK.

Supervisor displays the Activate Agent Trace window.

@Activate Agent Trace	
Actions Edit Help	
Agent names or logids:	•
Agent trace:	
O On	
Off	
	test

- 5. Ensure that the **Agent names or logids:** field is blank.
- 6. In the Agent trace: options, select the state to view:
  - On Displays all currently active agent traces.
  - Off Displays all disabled agent traces.
- 7. From the menu bar, select Actions > List All.

*Supervisor* displays a window with a list of all agents who are currently in the selected trace state.

## Listing agents traced

This section provides the procedure for listing agents and dates for which agent trace data is available on reports. As with most operations, it is possible to run these operations through scripts and timetables. For more information on scripts and timetables, see <u>Chapter 5: Scripting CMS operations</u> on page 203 and <u>Chapter 13: Using timetables and shortcuts</u> on page 619, respectively.

## Before you begin

To view data through this operation, an agent trace must be activated for one or more agents. Also, agents for whom traces are activated must log in so that *CMS* creates agent trace records.

## Permissions

Depending on the procedure that you want to perform, you need the following permissions:

• To list all agents traced, the user ID used to start this *Supervisor* session must have *read* permission for the Agent Administration subsystem.

## Steps

To list all agents with trace data:

1. From the Controller Window, select **Commands** > **Agent Administration**.

Supervisor displays the Agent Administration window.

Agent Administration			? ×
Operations Reports		Ì	
Operations:			
Activate Agent Trace Change Extension Split Assignments			
List Agents Traced Move Extensions Between Splits			
move extensions between splits			
<u> </u>			
ACD:			
ST11			<b>T</b>
<u>S</u> cript			Help
	40		Cancel

- 2. In the Operations: list, highlight List Agents Traced.
- 3. In the ACD: field, select the ACD for which agents being traced will be listed.

## 4. Select OK.

Supervisor displays the List Agents Traced window.

E List Agents Traced	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
Agent(s):	
Dates:	
	Bison36vpe

#### Note:

The procedure for viewing agent trace records varies according to the information that you enter in the fields of the **List Agents Traced** window. The results for listing agents traced relies on the entries made in the **Agent(s):** field, the **Dates:** field, or a combination of the two. For example, you can specify a small range of agents in the **Agent(s):** field and a date range in the **Dates:** field. This will result in a list of only the specified agents for the date range entered.

- 5. Use the following descriptions to determine how information is entered in the **Agent(s):** and **Dates:** fields:
  - Use the **Agent(s):** field to specify none, one, or more agents to use in displaying agent trace records.

Leave this field blank to show all agent trace records for the dates entered in the **Dates:** field.

Only those agents with login IDs in the Dictionary can be entered in the **Agent(s)**: field.

This field can accept multiple values. Multiple values must be separated by a semicolon (;).

 Use the Dates: field to specify no date, a single date, multiple dates, or a range of dates.

Leave this field blank to show all agent trace records for the agents entered in the **Agent(s):** field.

This field can accept multiple dates or a range of dates. Multiple dates must be separated by a semicolon (;).

- Leave both the Agent(s): and Dates: fields blank to have Supervisor display all agent trace records.
- 6. Select Actions > List All to display the agent trace records that match the information that you entered in the Agent(s): and Dates: fields.

*Supervisor* displays a secondary window listing the dates and agents for which agent trace data is available, sorted by date.

# **Changing agent skills**

Use the **Change Agent Skills** window to configure agent skills on systems with Expert Agent Selection (EAS).

## Actions performed by this feature

Use this feature to perform the following actions:

- View the current skill assignment
- Change the skills of an agent or agent template
- Add agents to an agent template
- Set the skill of an agent or agent template to *primary* or *secondary*
- Set the level of the skill for an agent from 1 to 16

## Before you begin

The following items should be read and understood before changing agent skills:

- The Change Agent Skills item is only available for ACDs on which EAS is activated.
- When agent skills are changed, the change is made to the Communication Manager system and remains in effect until another change is made through *Supervisor* or the Communication Manager system itself.
- When agent skills are changed, you cannot exit the **Change Agent Skills** window until the ACD responds to the requested agent changes.
- A template can be any existing agent profile where the skill settings of the profile are applied to other agent profiles. At any one time, you can apply these settings to a maximum of 50 agents. After you apply the skill settings, any changes that you make to the agent profile that was originally used as the template do not affect the other agent profiles.
- Skill changes take effect immediately for agents who are in AUX work mode, AVAIL (available), or logged out. Changes are pending for agents on calls or in ACW work mode until the agent enters the AUX work mode, becomes available, or logs out. Because of this, agents who frequently have calls on hold may have skill changes remain pending for a longer time than expected.
- Changing agent skills should only be done through *Supervisor* as it checks if the agent has the appropriate permissions for the newly assigned skills. The *CMS* ASCII interface does not perform permission checking which can result in agents belonging to skills to which they do not have permissions.

## Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view agent skill assignments, the user ID used to log in to this *Supervisor* session requires *read* permission for the Agent Administration subsystem.
- To change agent skills, the user ID used to log in to this *Supervisor* session requires *write* permission for the Agent Administration subsystem.

## Steps

To change skills for an agent:

1. From the Controller Window, select **Commands** > **Agent Administration**.

Supervisor displays the Agent Administration window.

Agent Administration		? ×
Operations Reports	Ì	,
Operations:		
Activate Agent Trace Change Agent Skills		
List Agents Traced		
Multi-Ägent Skill Change		
ACD:		
ST10		
<u>S</u> cript		Help
	OK	Cancel

- 2. In the ACD field, select the ACD for which you want to change agent skills.
- 3. In the Operations: list, highlight Change Agent Skills.
- 4. Select OK.

Supervisor displays the Select Agent/Template window.

${igsim}$ Select Agent/Template	×
Select an agent to administer or a template to administ for multiple agents.	er
Agent	_
Jane Doe	1
OK Cancel Help	

- 5. In the **Select Agent/Template** window, enter the Agent ID using one of the following methods in order view or change their skills:
  - The agent login ID

- The name of the agent
- An agent template

See the beginning of this section for more information on agent templates.

6. Select OK.

*Supervisor* displays the **Change Agent Skills** window with the agent or template name and login ID in the title bar.

${igsidentify} \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$	? ×		
Call Handling Preferences			
Skill Level			
C Greatest Need	C Service Objective		
C Percent Allocation	Direct Agent Calls First		
Agent Skills and Skill Levels	Percent  Add Skills  Delete Skills  Make Top Skill		
Direct Agent Skill: \$51	Totals:		
Agent Name(s) or Login ID(s)  Use for one or more Agent(s) (Maximum of 50 Agents)  Mary Smith; John Jones			
<u> </u>	<u>S</u> cript <u>H</u> elp		
Select skills to add to or delete from the agent, and the	nen select the OK Button. Bison36vpe		

The skills and skill level for the agent or template that you named are shown in the **Assigned Skills** field and **Level** field, respectively.

Skill names are shown for the skills that are defined in the Dictionary. Skill numbers are shown for the skills that are not defined in the Dictionary.

These skill settings for an agent can be passed on to other agent profiles. To specify the agents who are to receive the skill settings, select **Use for one or more Agents:** and enter the agent IDs in the associated field.

7. Choose one of the following	options to	o change the sl	kills of this agent or template.

lf	Then
You want to change which calls an agent receives first	Select a different method in the <b>Call Handling</b> <b>Preferences</b> group box. Calls can be distributed to the selected agent based on:
	<ul> <li>Skill Level</li> <li>Greatest Need</li> <li>Percent Allocation</li> <li>The Skill Level for the agent is shown in the Assigned Skills list. Percent Allocation is only available if Avaya Business Advocate is enabled on the Communication Manager system.</li> </ul>
You want to change the	Perform one of the following actions:
skill that is used to queue an agent's direct agent calls	<ul> <li>Select a new skill from the Direct Agent Skill drop-down list.</li> <li>Enter the name or number of the skill in the Assigned Skills column of the Agent Skills and Skill Levels group that will be used for queuing the direct agent calls to the specified agent. You may then select the skill from the Direct Agent Skill drop-down list.</li> <li>The Direct Agent Skill list does not contain reserve skills. If the agent who is currently displayed has only reserve skills in the Assigned Skills list, no Direct Agent Skill can be assigned to that agent.</li> </ul>
You want to change the	Perform the following procedure:
level/type that is associated with skill that is already assigned	<ol> <li>In the Assigned Skills list, select the level of the skill for which you want to change the value. Note that if you have a Skill Level Call Handling Preference, an arrow indicates the agent's Top Skill assignment.</li> </ol>
	<ol> <li>Select a new value for the skill level from the Level drop-down list in the Agent Skills and Skill Levels group.</li> </ol>
	If <b>Skill Level</b> is selected in the <b>Call Handling</b> <b>Preference</b> group and only reserve levels are assigned to an agent, that agent does not have a top skill and the <b>Make Top Skill</b> button is disabled.
	3. Select <b>OK</b> .

lf	Then			
You want to remove skills	Perform the following procedure:			
that are assigned to this agent or template	<ol> <li>In the Assigned Skills field, select the skills to remove from the agent.</li> </ol>			
	2. Select the <b>Delete Skills</b> button.			
	Note that if an agent has only one assigned skill, this skill cannot be deleted.			
You want to add skills to this agent or template	Select the Add Skills button. In the Available Skills list of the Add Agent Skills window, highlight one or more skills that you want to assign to the agent as well as the Skill Level for these new skills. The Available Skills field lists all the skills that are defined on this ACD. When you are finished adding skills, select the OK button in the Add Agent Skills window.			
You have Avaya Business	Perform the following procedure:			
Advocate and want to specify a new percent allocation	<ol> <li>In the Call Handling Preferences group, select Percent Allocation.</li> </ol>			
	Note that the <b>Percent Allocation</b> field is unavailable if a reserve level has already been specified for an agent or template.			
	<ol> <li>Select the Yes button from the warning window. This indicates that you want to enable the Percent Allocation feature.</li> </ol>			
	If an agent or template has <b>Percent Allocation</b> call handling preference, the total percent allocation for all standard skills must equal 100%.			
	By default, <b>Direct Agent Calls First</b> is activated. If a call handling preference other than <b>Percent</b> <b>Allocation</b> is selected, direct agent calls are delivered first, and the <b>Direct Agent Calls First</b> check box is not applicable.			
You want to make an	Perform the following procedure:			
Assigned Skill the Top Skill for this agent	<ol> <li>In the Assigned Skills column of the Agent Skills and Skill Levels group, select the skill that you want to be the top skill of the agent.</li> </ol>			
	2. Select the Make Top Skill button.			

lf	Then
You want to apply the	Perform the following procedure:
changes to a group of up to 50 agents	<ol> <li>Select the Use for One or More Agents (Maximum of 50 Agents) check box.</li> </ol>
	<ol> <li>Enter the agent names or login IDs in the Agent Name(s)/Login ID(s) field, select them from the drop-down list, or select them from the Browse window.</li> </ol>
	3. Select <b>OK</b> .
	Changes are submitted to the <i>CMS</i> server. If a move is pending, you are notified that the operation will not occur until the pending conditions are resolved. If you are applying a template to a list of up to 50 agents, <i>Supervisor</i> buffers the change agents skills requests and send them to the <i>CMS</i> server one at a time. <i>Supervisor</i> displays a status box that indicates the status of each requested agent change.
	If an error in encountered with changes to agent skills, <i>Supervisor</i> displays a message that states what is in error. Select <b>OK</b> or <b>Cancel</b> to dismiss the error message and return to the <b>Change Agent Skills</b> window so that the error can be corrected.
	4. Select <b>OK</b> .
	If the change is successfully made, <i>Supervisor</i> displays a successful message in the status bar.
	If the state of an agent is not in AUX or AVAIL, <i>Supervisor</i> displays a message which states that the changes will be applied when the agent returns to one of those states.
	5. Select <b>OK</b> .
	Supervisor closes the Change Agent Skills window.

lf	Then
You are finished making	Perform one of the following actions:
changes	<ul> <li>Select OK in the Select Agent/Template window. This action saves the changes that you made to the agent skills.</li> <li>Select Cancel in the Select Agent/Template window. This action cancels any changes that you made.</li> </ul>
You want to make skill	Perform the following actions:
assignment changes for other agents or templates	1. Select another agent or template in the <b>Select Agent/</b> <b>Template</b> window.
	2. Return to Step 5 and continue with the procedure.

# Changing skills for multiple agents

This section provides the procedure for changing skills for more than one agent at a time. Use the **Multi-Agent Skill Change** window to view current skill assignments or to change a skill for as many as 32 agents. You can also use this window to specify the skill levels and type of the skills.

## Before you begin

The following items should be read and understood before beginning work with the **Multi-Agent Skill Change** window:

- When agent skills are changed, the change is made to the Communication Manager system and remains in effect until another change is made through *Supervisor* or the Communication Manager system.
- You cannot exit from the **Multi-Agent Skill Change** window until the Communication Manager system responds to the requested changes.
- Skill changes take effect immediately for agents who are in AUX work mode, AVAIL (available), or logged out. Changes are pending for agents on calls or in ACW work mode until the agent enters the AUX work mode, becomes available, or logs out.
- For agents who frequently have calls on hold, skill changes can remain pending for a longer time than expected.

## Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view agent skill assignments, the user ID used to log in to this *Supervisor* session requires *read* permission for the Agent Administration subsystem.
- To change agent skills, the user ID used to log in to this *Supervisor* session requires *write* permission for the Agent Administration subsystem and for the skills to which agents are assigned.

## Steps

To change one skill for multiple agents:

1. From the Controller Window, select **Commands > Agent Administration**.

Supervisor displays the Agent Administration window.

Agent Administration		? ×
Operations Reports	Ì	
Operations:		
Activate Agent Trace Change Agent Skills		
List Agents Traced		
Multi-Ägent Skill Change		
1		
ACD:		
ST10		
<u>S</u> cript		<u>H</u> elp
	OK	Cancel

- 2. In the **ACD**: field, select the ACD for which you want to change agent skills.
- 3. In the **Operations:** list, highlight the **Multi-Agent Skill Change** item.
- 4. Select OK.

Supervisor displays the Multi-Agent Skill Change window.



- 5. Use one of the following methods to choose a skill:
  - Double-click the skill name or number.

• Highlight a skill and press the Enter key.

Supervisor displays a second window that shows the agents assigned to this skill who are currently logged in.

Skills Agents View Window					<u>- 🗆 ×</u>
Skill List	Name       agent2       agent15       agent12       agent3       agent13       agent6       agent29	D Type 50002 50015 50012 50004 50003 50013 50013 50010 50005 50029 50029	Level 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3	Call Handling NEED NEED NEED NEED NEED NEED NEED NEE	Perc
TFax ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■					

Clicking the left mouse button on the column headings sorts the contents between ascending and descending order.

To view or change the current skills of an agent in the skill window, double-click the agent name.

- 6. To move agents from the current skill to another skill, perform one of the following actions:
  - To move a single agent, use the mouse to drag-and-drop an agent to a new skill in the **Skill List** window.
  - To move multiple agents to a new skill, hold down the **Ctrl** key and click on multiple agents to select them. You can select a range of agents by clicking on the agent at the beginning of the range, holding down the **Shift** key, and then clicking the agent at the bottom of the range.

Use the drag-and-drop method to move the agents from the window for their current skill to a new skill in the **Skill List** window.

 Another way of moving agents from one skill to another is to open a window for the new, target skill by double-clicking that skill in the Skill List window. You can then drag-and-drop agents between the two skill windows.

Note that holding down the **Ctrl** key while dragging and dropping agents will add, not move, the agent or agents to the new skill.

*Supervisor* displays the **Move Agents Between Skills** window with the **Agents** field showing the following:

- The agents you moved
- The call-handling preferences of the agents

- The reserve level or skill level of each agent
- The service objective of each agent
- The percent allocation for the skill of each agent. Percent allocation is only available on Communication Manager systems with *Avaya Business Advocate*.

e Agents Betwee	n Skills					?
gents						Move
Name	ID	Level	Call Handling	Svc. Obj.	Percent	From Skill:
agent2	50066	2	LVL	No		Skill 14
agent5	50070	2	LVL	No		To Skill:
						Skill 17
						Preserve Original Levels
						· Treserve Original Levels
						C Level 1 🔽
<u>0</u> K		Cancel	l Ser	ipt	<u>H</u> elp	
<u></u>					<u>11-4</u>	

The **Move** group displays information showing the skills involved in moving this agent. If the agent is being added to a new skill, not moved, the **From Skill:** information is blank and the **Preserve Original Levels** option is unavailable.

- 7. In the **Move Agents Between Skills** window, perform one of the following actions to complete moving agents from skill to skill:
  - Select the **Level** option and enter a skill-level value for each agent that you moved to this new skill.
  - To keep the current skill level of the agent, select the **Preserve Original Level** option. This action deactivates the **Level** option.
- 8. Select OK.

If one or more agent moves fail, *Supervisor* displays a status window showing the reasons for failure. Otherwise, the status window notifies you that the change is pending.

# **Changing extension split assignments**

This section provides the procedure for assigning an extension to a different split. This feature is used for Communication Manager systems without Expert Agent Selection (EAS). Use the **Change Extension Split Assignments** window to list the extensions that are in the currently assigned splits or to change the splits that are assigned to a specific extension number.

## Before you begin

The following should be read and understood before changing extension split assignments:

- You cannot exit from the **Change Extension Split Assignments** window until the Communication Manager system responds to the requested changes.
- Extension split assignment changes take effect immediately for agents who are in AUX work mode, AVAIL (available), or logged out. Changes are pending for agents on calls or in ACW work mode until the agent enters the AUX work mode, becomes available, or logs out.
- For agents who frequently have calls on hold, extension split assignment changes can remain pending for a long time.

## Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view extension split assignments, you need *read* permission for the Agent Administration subsystem.
- To change extension split assignments, you need *write* permission for the Agent Administration subsystem and for the splits to which the extensions are assigned.

## Steps

To change an extension split assignment:

1. From the Controller Window, select **Commands** > **Agent Administration**.

Supervisor displays the Agent Administration window.

🖗 Agent Administi	ation		? >
Operations	Reports	Ì	
Operations:	, i i i i i i i i i i i i i i i i i i i		
Activate Agent Tra Change Extension	ee Split Assignments		
List Agents Traced			
Move Extensions B	etween Splits		
ACD:			
ST11			
1			
<u>S</u> cript			<u>H</u> elp
		OK	Cancel

- 2. In the **ACD** field, select the ACD for which you want to change extension split assignments.
- 3. Select **Operations > Change Extension Split Assignments**.
- 4. Select OK.

Supervisor displays the Select Extension window.

Ç{ Select Extensi	on		х
Extension			
I		•	
<u>0</u> K	<u>C</u> ancel	<u>H</u> elp	

5. In the **Select Extension** window, enter the extension number for which the split assignment is to be changed.

The extensions that are assigned to each split can be viewed in the **Move Extensions Between Splits** window. See <u>Moving extensions between splits</u> on page 241 for more information. 6. Select **OK**.

Supervisor displays the Change Extension Split Assignments window.

Cf Change Extension Split Assignments Extension/Agent: 20124 50064	? ×
Move Extension From Split:	
Move Extension To Split:	
	Help

The **Move Extension From Split** field shows the current split assignment. The **Move Extension To Split** field shows available split names or numbers. If an agent is logged in on the extension, the logged-in icon is displayed as shown in the above graphic. If an agent is not logged in on the extension, an icon is not displayed.

7. Perform one of the following actions:

If	Then
You want to change split assignments for an extension other than the one that is displayed	Select <b>Cancel</b> to return to the <b>Select Extension</b> window and then return to step 5.
You want to change split assignments for this extension	Continue with the next step.

8. Perform one of the following actions:

lf	Then
You want to remove a split assignment from this extension	Select the split name or number that is to be removed from this extension in the <b>Move Extension From Split</b> box.
You want to assign a split assignment to this extension	Select the split name or number that is to be assigned to this extension in the <b>Move Extension To Split</b> box.

#### 9. Select OK.

CMS applies the split assignment changes made to the extension.

## Moving extensions between splits

This section provides the procedures for adding a split to an extension, removing a split from an extension, and moving an extension to another split. This features is for those systems without Expert Agent Selection (EAS). You can also use the **Move Extensions Between Splits** window to view extension split assignments.

## Before you begin

The following items should be read and understood before moving extensions between splits:

- As many as 32 agents can be moved at one time.
- You cannot exit from the **Move Extensions Between Splits** window until the Communication Manager system responds to your request.
- Extension split assignment changes take effect immediately for agents who are in AUX work mode, AVAIL (available), or logged out. Changes are pending for agents on call or in ACW work mode until the agent enters the AUX work mode, becomes available, or logs out.
- For agents who frequently have calls on hold, an extension move request can remain pending for an extended period of time.

#### Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view extension assignments, the user ID used to log in to this *Supervisor* session requires *read* permission for the Agent Administration subsystem and the affected splits.
- To move extension assignments, the user ID used to log in to this *Supervisor* session requires *write* permission for the Agent Administration subsystem and the affected splits.

## Steps

To move extensions between splits:

1. From the Controller Window, select **Commands > Agent Administration**.

Supervisor displays the Agent Administration window.

Agent Administration		? ×
Operations Reports	)	
Operations:		
Activate Agent Trace Change Extension Split Assignments List Agents Traced		
Move Extensions Between Splits		
ACD:		
IST11		
<u>S</u> cript		Help
	ОК	Cancel

- 2. In the **ACD:** field, select the ACD that contains the extensions to move.
- 3. In the **Operations:** list, highlight **Move Extensions Between Splits**.
- 4. Select OK.

Supervisor displays the Move Extensions Between Splits window.

Split Agents View Window Help         203         203         204         Agent         Extension	It Move Extensions Between Splits	_ 🗆 ×
	Split Agents View Window Help	
To display extensions assigned to a split, select the split name and press enter.	To display extensions assigned to a split select the split name and press enter	test

- 5. Select the split to work with by performing one of the following actions:
  - Double-click the split name or number in the **Split List** window.
  - Highlight the split to work with in the **Split List** window and then select **Split > Open** selected split from the menu bar.

- 6. To move one or more extensions from the current split to another split, perform one of the following actions:
  - To move a single extension, use the mouse to drag-and-drop an extension to a new split in the **Split List** window.
  - To move multiple extensions to a new split, hold down the **Ctrl** key and click on multiple extensions to select them. You can select a range of extensions by clicking on the extension at the beginning of the range, holding down the **Shift** key, and then clicking the extension at the bottom of the range.

Use the drag-and-drop method to move the extensions from the window for their current split to a new split in the **Split List** window.

• Another way of moving extensions from one split to another is to open a window for the new, target split by double-clicking that split in the **Split List** window. You can then drag-and-drop extensions between the two split windows.

Supervisor displays the Move Extensions Between Splits window.

ve Extensions Between	Splits	Move	? ×
Name 50056 50057 50058	ID 20106 20107 20108	From Split: 12 To Split: 17	
<u>K</u>	<u>C</u> ancel	<u>S</u> cript	<u>H</u> elp

Select OK in the Move Extensions Between Splits window to complete the moving of the selected extensions.

# Running a split members report

This section provide the procedure for running a split members report. This report displays the extensions that are members of a specific split. Unlike regular reports, a custom or designer report cannot be created from the split members report. The split members report lists the selected splits in numerical order, each split's assigned name, and the extensions that are assigned to the split.

## Permissions

Depending on the procedure that you want to perform, you need the following permissions:

• To run a split members report, the user ID used to log in to this *Supervisor* session requires *read* permission for the Agent Administration subsystem and for all affected splits.

## Steps

To run a split members report:

1. From the Controller Window, select **Commands** > **Agent Administration**.

Supervisor displays the Agent Administration window.

Agent Administration		? ×
Operations Reports	)	
Operations:		
Activate Agent Trace Change Extension Split Assignments List Agents Traced		
Move Extensions Between Splits		
ACD:		
ST11		
Script		<u>H</u> elp
	OK	Cancel

2. Select the Reports tab.

Supervisor displays the **Reports** tab of the **Agent Administration** window.

- 3. In the ACD: field, select the ACD on which to run the split members report.
- 4. In the **Reports:** list, highlight **Split Members**.

## 5. Select OK.

Supervisor displays the Split Members window.

🖻 Split Members		_ 🗆 ×
Inputs		
Splits: BSR	▼ 🛃	
Destination		
View Report on Screen		
C Print Report on:	\\DRPRINT2\33b37	4
	OK Cancel	<u>H</u> elp
		ST11

- 6. Enter the split information in the **Splits:** field. This can be one split, multiple splits, or a range of splits. Multiple splits must be separated by a semicolon (;).
- 7. In the Destination group, select View Report on Screen or Print Report on:.
- 8. Select OK.

Supervisor displays or prints the **Split Members** report.

<u>H</u> elp			
Split		Split Name	Extn -
1	BSR		53016
1	BSR		53014
1	BSR		53012
1	BSR		53018-
1	BSR		5302C
1	BSR		53022
1	BSR		53004
1	BSR		53002
1	BSR		5301C
1	BSR		53006
1	BSR		53008
1	BSR		51116
1	BSR		53042
1	BSR		5304C
1	BSR		53038 💆

If the split does not have a name assigned, the **Split Name** columns on the report shows the split number. If the split has no extensions assigned to it, the **Extension** column is blank. Administering contact center agents

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# Chapter 7: Administering the contact center configuration

This section provides the procedures to perform operations to configure the contact center.

Depending on the type of Communication Manager system and the features that are enabled on it, the items on the **Call Center Administration** menu will vary.

This section contains the following topics:

- Before you begin on page 247
- ACD Groups on page 248
- Call work codes on page 262
- <u>VDN skill preferences</u> on page 268
- Split/skill call profiles on page 274
- Trunk group assignments on page 282
- Trunk group members report on page 287
- <u>VDN-to-vector assignments</u> on page 289
- <u>VDN call profiles</u> on page 294
- <u>Vector configuration report</u> on page 302

## Before you begin

If an ACD Group is selected as the current ACD in the **Dictionary** window, only those operations that are valid for the ACD Group will appear in the **Operations:** list.

## **ACD Groups**

An ACD Group is an administrator-assigned collection of ACDs.

This section contains the following topics:

- Before you begin on page 248
- ACD Group capabilities on page 249
- <u>ACD Groups feature interfaces</u> on page 250
- Permissions on page 250
- Adding an ACD Group on page 251
- Listing all ACD Groups on page 252
- Adding an ACD to an ACD Group on page 253
- Viewing the contents of an ACD Group on page 254
- Deleting an ACD from an ACD Group on page 256
- Modifying an ACD Group on page 258
- Deleting an ACD Group on page 260

## Before you begin

The following items should be read and understood before you work with ACD Groups:

## Availability

- If the ACD Groups feature has not been purchased, it will not appear in the **Dictionary** or **Call Center Administration** interfaces.
- If you add an ACD Group, you will need to log out of *Supervisor* and log back in to see this group as a choice in the appropriate dialogs.

#### **Capacities/Performance**

- A maximum of 12 ACD Groups can exist on an Avaya CMS server.
- Each ACD Group can contain zero to eight ACDs.
- CMS must be in single-user mode in order to add or delete ACD Groups.

#### **Roles/Definitions**

• An ACD Group cannot serve as the CMS master ACD.

- An ACD Group cannot be deleted if it is set as the current ACD.
- When created, ACD Groups will be assigned an ACD ID number from 27 through 38. This number is automatically assigned by *CMS* and cannot be altered.
- ACD Groups will not disallow an ACD being added as a member based on its version or feature set.
- Pseudo-ACDs cannot be a member of an ACD Group.
- When an ACD Group is deleted, all synonyms assigned to its member ACDs will remain.
- Names must begin with an alphabetic character and can be up to 20 characters long. Valid characters are alphanumerical (a-z, A-Z, 0-9), underscore (\_), blank ( ), comma (,), period (.), single quote ('), and plus (+). Multiple values are not allowed.

## Synonyms

- Overlapping ACD Groups (groups having common member ACDs), could result in synonym conflict within the members of an ACD Group if poorly administered. Because of this capability, entity IDs in overlapping ACD Groups must be mutually exclusive.
- Entity synonyms must be unique for an ACD Group and across all of the ACDs that are members of the ACD Group.

## Other

- User permissions are administered separately for an ACD Group and its member ACDs.
- *CMS* real-time custom reports are only displayed if data collection is enabled and the ACD link status is 'up' for at least one member ACD in the specified ACD Group. An error message will be displayed if these conditions are not met.
- Custom reports that are created with the **Single ACD Only** option enabled cannot be run for an ACD Group and vice versa.
- If a backup was created on a *CMS* server where the Global Dictionary feature was authorized, the data can only be restored on a *CMS* server that also has this feature authorized. If the Global Dictionary feature authorizations between a backup and the target *CMS* server do not match, an error is displayed, a message is written to the error log, and the restore or migration fails.

## ACD Group capabilities

This optional feature provides the following capabilities:

• Easy administration of synonyms in the Dictionary across multiple ACDs. A synonym assigned to a *CMS* entity for an ACD Group is then propagated to all members ACDs within that group. For example, if you assign skill 102 in the ACD Group with the synonym of *Sales*, this synonym is assigned to skill 102 for all ACDs within that group.

This feature should be utilized when a contact center uses multiple ACDs that require the same synonyms across all of the ACDs for the following entities:

- Agent login IDs
- Agent groups
- Splits/Skills
- AUX reason codes
- Logout reason codes
- Agent string values
- Split/Skill string values
- Generic string value synonyms
- The reporting of data from multiple ACDs through the use of custom reports. Reports for ACD Groups collect, aggregate, and display contact center data as a single value for the ACD Group instead of one set of values for each member ACD. Custom reports can be created through the *CMS* ASCII interface or ordered through the Avaya Professional Services Organization. For example, the reporting aspect of this feature can be used to view data for a *CMS* entity across multiple ACDs such as a skill, a specific agent login ID, and so forth.

## **ACD Groups feature interfaces**

The ACD Groups feature is available through two interfaces:

- Call Center Administration This subsystem is used for administrators to create, modify, and delete ACD Groups.
- **Dictionary** This subsystem is used by *CMS* users who need to view ACD Groups, their contents, and to assign ACD Group synonyms.

## **Permissions**

- To create, modify, and delete ACD Groups, a *CMS* user must have the *read* and *write* permissions for the **Call Center Administration** subsystem.
- If a *CMS* user only requires the ability to view ACD Groups and the member ACDs, *read* permission is required for the **Dictionary** subsystem.
- To assign synonyms to an ACD group, a *CMS* user requires the *read* and *write* permissions for the **Dictionary** subsystem as well as the ACD Group and its member ACDs.

## Adding an ACD Group

This topic provides the procedure for creating an ACD Group. After an ACD Group is created, member ACDs can then be added. See <u>Adding an ACD to an ACD Group</u> for more information.

## Before you begin

Before performing this procedure, you should ensure that you have read and understood <u>Before you begin</u> on page 248.

## Steps

To add an ACD Group to CMS:

1. From the Controller Window, select **Commands** > **Call Center Administration**.

Supervisor displays the Call Center Administration window.

Call Center Ad	Reports	1	1 1
Operations:	J	1	
ACD Groups Call Work Codes			
Change VDN Skill			
Split/Skill Call Prof Trunk Group Assig			
VDN Assignments VDN Call Profile S	etup		
ACD:			
ACD3		 •	1
Script			Help
			Tob
<u></u>			

- 2. In the **Operations:** list, highlight **ACD Groups**.
- 3. Select OK.

Supervisor displays the Call Center Administration ACD Groups window.

館 Call Center Admin: ACD Groups	_ 🗆 X
Actions Edit Help	
�⊠§ ∕►≠≣☞ ¶	
ACD Group Name:	
ACD Group Number:	

4. In the **ACD Group Name:** field, enter a name for this new ACD Group.

5. From the menu bar, select **Actions** > **Add**.

CMS creates the ACD Group and assigns an ACD Group Number.

## Listing all ACD Groups

This topic provides the procedure for listing all ACD Groups defined on the CMS server.

Listing all ACD Groups can be done through either the **Call Center Administration** or **Dictionary** subsystems. Only those *CMS* users who have *read* permission for the **Call Center Administration** subsystem can use the procedure listed below. *CMS* users who only work with synonyms or running reports should use the procedure associated with the **Dictionary** subsystem for listing all ACD Groups.

#### Steps

To list all ACD Groups defined on the CMS server:

1. From the Controller Window, select **Commands > Call Center Administration**.

Supervisor displays the Call Center Administration window.

🖗 Call Center Admi	nistration			? ×
Operations	Reports	)		
Operations:	ŕ			
ACD Groups Call Work Codes				_
Change VDN Skill Pi				
Split/Škill Call Profile Trunk Group Assignr	setup nents			
VDN Assignments VDN Call Profile Setu	ID			
	-			
ACD:				
ACD3			-	
			_	1
<u>S</u> cript				Help
		OK		Cancel

- 2. In the **Operations:** list, highlight **ACD Groups**.
- 3. Select OK.

Supervisor displays the Call Center Administration ACD Groups window.

t角 Call Center Admin: ACD Groups	_ 🗆 X
Actions Edit Help	
�ℤÿ ✔♠┍≣┏ Я	
ACD Group Name:	
ACD Group Number:	

- 4. From the menu bar, select Edit > Clear All to remove any data from the fields.
- 5. Select Actions > List All.

Supervisor displays a dialog listing the ACD Groups defined on this CMS server.

🟥 Call Center Adn	nin: ACD Groups: List all	_ 🗆 🗵
<u>A</u> ctions <u>E</u> dit <u>H</u> elp		
ACD Group Name	ACD Group Number	
ACDG roup1	28	
ACDG roup2	27	
ACDG roup3	29	
ACDG roup4	30	
4 matches found; pe	rmitted ones displayed	

### Adding an ACD to an ACD Group

This topic provides the procedure for adding an ACD as a member of an existing ACD Group. This procedure can only be performed after an ACD Group has been created. See Adding an ACD Group on page 251 for more information.

### Before you begin

Before performing this procedure, you should ensure that you have read and understood Before you begin on page 248.

### Steps

To add an ACD to an existing ACD Group:

1. From the Controller Window, select **Commands > Call Center Administration**.

Supervisor displays the Call Center Administration window.

Call Center Administration		? ×
Operations Reports		
Operations:		
ACD Groups Call Work Codes Change VDN Skill Preferences Spil/Skill Call Profile Setup Trunk Group Assignments VDN Assignments VDN Call Profile Setup		
ACD:		-
<u>S</u> cript		
	OK	Cancel

- 2. In the **Operations:** list, highlight **ACD Groups**.
- 3. Select OK.

Supervisor displays the Call Center Administration ACD Groups window.

t鍧 Call Center Admin: ACD Groups	_ 🗆 X
<u>A</u> ctions <u>E</u> dit <u>H</u> elp	
�⊠§ ∕♠≠≣⊭ ¾	
ACD Group Name:	
ACD Group Number:	

- 4. In the **ACD Group Name:** field, enter the name of the ACD Group that will receive a new ACD member.
- 5. Select Actions > Find One from the menu bar.

If the ACD Group name is valid, its numeric ID is displayed in the **ACD Group Number** field and **1 matches found** is displayed in the status bar.

6. From the menu bar, select **Actions** > **Get contents**.

Supervisor displays the Call Center Admin ACD Groups Get contents dialog.

創 Call Center Admin: ACD Groups: Get contents	
Actions Edit Help	
ACD Group: ACDGroup1	
ACD: ACD1	

7. From the **ACD** drop-down list box, select the ACD that will be added to this group.

#### Note:

If a *CMS* user does not have read and write permissions for an ACD, that ACD will not appear in this list. To view all of the ACDs assigned to this ACD Group, see Viewing the contents of an ACD Group on page 254.

8. Select **Actions** > **Add** from the menu bar.

The selected ACD is added to this ACD Group and **Successful** is displayed in the status bar.

### Viewing the contents of an ACD Group

This topic provides the procedure for displaying the contents of an ACD Group.

Viewing the contents of an ACD Group can be done through either the **Call Center Administration** or **Dictionary** subsystems. Only those *CMS* users who have *read* 

permission for the **Call Center Administration** subsystem can use the following procedure. *CMS* users who only work with synonyms or running reports should use the procedure in <u>ACD Groups</u> on page 57.

#### Steps

To view the current contents of an ACD Group:

1. From the Controller Window, select **Commands** > **Call Center Administration**.

Supervisor displays the Call Center Administration window.

Operations	Report	s			
Operations:	,				
ACD Groups Call Work Codes					
Change VDN Skil	Preferences				
Split/Skill Call Prol Trunk Group Assig	inments				
VDN Assignments VDN Call Profile S					
	otup				
ACD:					
ACD3				<b>_</b>	
<u>S</u> cript				<u>H</u> e	lp
		·····		1 .	. 1
			OK	E Car	

- 2. In the **Operations:** list, highlight **ACD Groups**.
- 3. Select OK.

Supervisor displays the Call Center Administration ACD Groups window.

👔 Call Center Admin: ACD Groups	_ 🗆 X
Actions Edit Help	
ACD Group Name:	
ACD Group Number:	

4. In the ACD Group Name: field, enter the name of the ACD Group you want to view.

#### Note:

If you are unsure of the name of the ACD Group, use <u>Listing all ACD</u> <u>Groups</u> on page 252 to determine the name.

5. From the menu bar, select **Actions > Find one**.

If the ACD Group name is valid, its numeric ID is displayed in the **ACD Group Number** field and **1 matches found** is displayed in the status bar.

6. Select Actions > Get contents.

Supervisor displays the Call Center Admin ACD Groups Get contents dialog.

👔 Call Center Admin: ACD Groups: Get contents	_ 🗆 X
Actions Edit Help	
ACD Group: ACDGroup1	
ACD: ACD1	

7. In the **ACD** drop-down list box, select (none).

#### Note:

If you do not select the **(none)** item, only the selected item in the ACD list will be displayed in the resulting dialog if it is a member of the specified ACD Group. If it is not a member of the ACD Group, the resulting dialog will be blank.

8. From the menu bar, select **Actions > List all**.

*Supervisor* displays the **Call Center Admin ACD Groups Get Contents List All** dialog showing all ACDs that are members of this ACD Group.

### Deleting an ACD from an ACD Group

This topic provides the procedure for removing an ACD from an ACD Group.

### Before you begin

Before performing this procedure, you should ensure that you have read and understood Before you begin on page 248.

To remove an ACD from an ACD Group:

1. From the Controller Window, select **Commands** > **Call Center Administration**.

Supervisor displays the Call Center Administration window.

🚱 Call Center Administr	ation			?	×
Operations	Reports				
Operations:					.
ACD Groups Call Work Codes					1
Change VDN Skill Prefere Split/Skill Call Profile Setu					
Trunk Group Assignments					
VDN Call Profile Setup					
1					
ACD:				T	
ACD3			<u>•</u>		.
<u>S</u> cript				<u>H</u> elp	
		OK		Cancel	

- 2. In the **Operations:** list, highlight **ACD Groups**.
- 3. Select OK.

Supervisor displays the Call Center Administration ACD Groups window.

t角 Call Center Admin: ACD Groups	_ 🗆 X
<u>A</u> ctions <u>E</u> dit <u>H</u> elp	
�⊠§ ∕♠≠≣⊭ 31	
ACD Group Name:	
ACD Group Number:	

4. In the **ACD Group Name:** field, enter the name of the ACD Group from which you want to delete a member ACD.

#### Note:

If you are unsure of the name of the ACD Group, use the procedure, <u>Listing</u> all ACD Groups on page 252.

5. From the menu bar, select **Actions > Get contents**.

Supervisor displays the Call Center Admin ACD Groups Get contents dialog.

👔 Call Center Admin: ACD Groups: Get contents	_ 🗆 🗙
Actions Edit Help	
� \	
ACD Group: ACDGroup1	
ACD: ACD1	

6. In the **ACD** drop-down list box, select the ACD to remove from this ACD Group.

#### Note:

If a CMS user does not have read and write permissions for an ACD, that ACD will not appear in this list. To view all of the ACDs assigned to this ACD Group, see <u>Viewing the contents of an ACD Group</u> on page 254.

7. From the menu bar, select **Actions > Find one**.

If the select ACD is a member of the specified ACD Group, **1 matches found** is displayed in the status bar.

8. Select Actions > Delete.

The selected ACD is removed from the specified ACD Group and *Supervisor* displays a message box asking if the synonyms assigned to this ACD should be removed as well.

 Select the Yes button to remove all synonyms that were assigned to this ACD through ACD Group administration. Otherwise, select No to preserve all synonyms on the ACD.

### Modifying an ACD Group

This topic provides the procedure for modifying the name of an existing ACD Group.

To modify the name of an existing ACD Group:

1. From the Controller Window, select **Commands** > **Call Center Administration**.

Supervisor displays the Call Center Administration window.

Operations Reports	
Operations:	
ACD Groups Call Work Codes	
Change VDN Skill Preferences	
Split/Skill Call Profile Setup	
Trunk Group Assignments VDN Assignments	
VDN Call Profile Setup	
1	- 11
ACD:	
ACD3	
Script Help	
OK Cance	

- 2. In the **Operations:** list, highlight **ACD Groups**.
- 3. Select OK.

Supervisor displays the Call Center Administration ACD Groups window.

t角 Call Center Admin: ACD Groups	_ 🗆 🗙
<u>A</u> ctions <u>E</u> dit <u>H</u> elp	
�⊠§ ∕♠≠≣⊭ 31	
ACD Group Name:	
ACD Group Number:	

4. In the ACD Group Name: field, enter the name of the ACD Group to change.

If you do not know the name of the ACD Group, use the procedure, <u>Listing all ACD</u> <u>Groups</u> on page 252.

5. From the menu bar, select **Actions > Find One**.

If the ACD Group name is valid, its numeric ID is displayed in the **ACD Group Number** field and **1 matches found** is displayed in the status bar.

6. In the ACD Group Name field, change the name of this ACD Group

See <u>Before you begin</u> on page 248 for information on naming conventions.

7. When you have finished changing the name of the ACD Group, select **Actions** > **Modify** from the menu bar.

The modification for the ACD Group is made to the *CMS* database and **Successful** is displayed in the status bar.

### **Deleting an ACD Group**

This topic provides the procedure for deleting an existing ACD Group.

### Before you begin

Before performing this procedure, you should ensure that you have read and understood <u>Before you begin</u> on page 248.

### Steps

To remove an ACD Group from the CMS server:

1. From the Controller Window, select **Commands** > **Call Center Administration**.

Supervisor displays the Call Center Administration window.

🖗 Call Center Adı	ninistration			? ×
Operations	Reports	)		
Operations:	,			
ACD Groups				
Call Work Codes Change VDN Skill	Preferences			- 1
Split/Skill Call Prof	le Setup			
Trunk Group Assig VDN Assignments	nments			- 1
VDN Call Profile S	etup			- 1
				-
ACD:				
ACD3			•	
<u>S</u> cript			<u>H</u> elp	
		[		_
		OK	Cancel	

2. In the **Operations:** list, highlight **ACD Groups**.

#### 3. Select OK.

Supervisor displays the Call Center Administration ACD Groups window.

創 Call Center Admin: ACD Groups	_ 🗆 🗙
Actions Edit Help	
ACD Group Name:	
ACD Group Number:	

4. In the ACD Group Name: field, enter the name of the ACD Group to delete.

If you do not know the name of the ACD Group, you can find it using the procedure, <u>Listing all ACD Groups</u> on page 252.

5. Select **Actions** > **Find One** from the menu bar.

If the ACD Group name is valid, its numeric ID is displayed in the **ACD Group Number** field and **1 matches found** is displayed in the status bar.

6. Select **Actions > Delete**.

The specified ACD Group is deleted from the CMS server.

# **Call work codes**

A *call work code* is a number that represents a particular call type or activity to track in the contact center, for example, promotional ads, complaints, or repeat orders. Agents use the dial pad on their voice terminal to enter call work codes. This information is sent to *CMS* for management reporting and can then be viewed in the call work code and call record historical reports.

#### Note:

Some telephony applications that are used on PCs require that digits be entered through the software interface instead of the dial pad on the voice terminal.

This section contains the following topics:

- Before you begin on page 262
- Permissions on page 263
- Adding call work codes on page 263
- Viewing call work codes on page 264
- Listing all call work codes on page 265
- Deleting call work codes on page 266

# Before you begin

The following items should be read and understood before beginning to work with call work codes:

- Call work codes must be positive integers with 1 to 16 digits. Names can be assigned in the Dictionary to call work codes that consist of nine digits or less. It is recommended that a fixed number of digits be used consistently for all call work codes. The use of a consistent number of digits makes it easier to add, delete, and search for call work codes.
- Call work code 0 is always assigned and is used to collect information on unassigned call work codes. Call work code 0 cannot be deleted. If an agent enters an unassigned call work code, it is displayed as code 0 on the call work code report. If a call work code exception is defined, the agent exceptions historical report shows the agents who entered invalid or unassigned call work codes.
- Disk space must be allocated for call work codes before they can be used. Call work codes are assigned to a specific ACD. The number of call work codes that can be assigned depends on the Data Storage Allocation settings for the ACD. See <u>Data</u> <u>Storage Allocation</u> on page 469 for more information.

- Daily, weekly, and monthly standard historical reports are available for call work codes. Call work codes also appear on the standard historical call record report. See the *Avaya CMS Supervisor Reports* document for more information.
- For standard call work code reports, the codes are assigned in the **Call Work Codes** window.
- To have a name refer to a call work code in a report instead of its numerical code, the name must first be assigned in the Dictionary.

### Permissions

Depending on the procedure to be performed, the following permissions are needed:

- To view call work codes, the user ID used to log in to this *Supervisor* session requires *read* permission for the Call Center Administration subsystem.
- To add or delete call work codes, the user ID used to log in to this *Supervisor* session requires *read* and *write* permission for the Call Center Administration subsystem.

# Adding call work codes

This section provides the procedure for adding a call work code for use in a contact center.

### Steps

To add a call work code:

1. From the Controller Window, select **Commands** > **Call Center Administration**.

Supervisor displays the Call Center Administration window.

🚱 Call Center Administra	ation			?	'×
Operations	Reports		Ì		
Operations:					
ACD Groups Call Work Codes					
Change VDN Skill Prefere	nces				
Split/Škill Call Profile Setu	р				
Trunk Group Assignments VDN Assignments					
VDN Call Profile Setup					
					- 11
100					
ACD:					
ACD3					.
<u>S</u> cript				<u>H</u> elp	
		OK		Cancel	

- 2. In the **Operations:** list, highlight **Call Work Codes**.
- 3. Select OK.

Supervisor displays the Call Work Codes window.

鶴 Call Center Administration: Call Work Codes	×
Actions Edit Help	
->¥	
Number of codes allocated: 200	
Number of codes administered: 50	
Call work code(s):	
Not available until a 'Find one' with multiple matches	ACD1

The following fields are displayed in the Call Work Codes window:

- Number of codes allocated: Total number of call work codes that exist in the CMS database
- Number of codes administered: Total number of call work codes currently in use
- Call work code(s): Used to specify a call work code that will receive an action

4. Enter the new call work code in the Call work code(s): field.

5. Select **Actions > Add**.

The status bar displays **Successful** if the call work code is added to the *CMS* database.

### Viewing call work codes

This section provides the procedure for viewing an existing call work code.

To view a call work code:

1. From the Controller Window, select **Commands** > **Call Center Administration**.

Supervisor displays the Call Center Administration window.

🚱 Call Center Administr	ation			?	х
Operations	Reports		)		
Operations:					
ACD Groups Call Work Codes					
Change VDN Skill Prefere	ences				
Split/Skill Call Profile Setu					
Trunk Group Assignments	;				
VDN Call Profile Setup					
·					11
400					
ACD:					
ACD3				<u> </u>	.
<u>S</u> cript				<u>H</u> elp	
		· · · · · · · · · · · · · · · · · · ·			
		OK.		Cancel	

- 2. In the **Operations:** list, highlight **Call Work Codes**.
- 3. Select OK.

Supervisor displays the Call Work Codes window.

盦 Call Center Administration: Call Work Codes	X
Actions Edit Help	
� \$ <b>∕ ≒ ∕ E 3</b> 1	
Number of codes allocated: 200	
Number of codes administered: 50	
Call work code(s):	•
Not available until a 'Find one' with multiple matches	ACD1

- 4. Enter the call work code to view in the Call work code(s): field.
- 5. Select Actions > Find one.

If the call work code exists in the *CMS* database, the status bar displays the message, **1 matches found**.

### Listing all call work codes

This section provides the procedure for listing all existing call work codes.

To list all call work codes in the CMS database:

1. From the Controller Window, select **Commands** > **Call Center Administration**.

Supervisor displays the Call Center Administration window.

🚱 Call Center Administration		? ×
Operations Reports	)	
Operations:		
ACD Groups Call Work Codes		
Change VDN Skill Preferences		
Split/Skill Call Profile Setup Trunk Group Assignments		
VDN Assignments		
VDN Call Profile Setup		
ACD:		
ACD3		<b>•</b>
<u>S</u> cript		<u>H</u> elp
		Cancel

- 2. In the **Operations:** list, highlight **Call Work Codes**.
- 3. Select OK.

Supervisor displays the Call Work Codes window.

盦 Call Center Administration: Call Work Codes	×
Actions Edit Help	
Number of codes allocated: 200	
Number of codes administered: 50	
Call work code(s):	
Not available until a 'Find one' with multiple matches	ACD1

4. Select Actions > List all.

*Supervisor* displays a secondary window that lists all call work codes having a synonym in the Dictionary.

### **Deleting call work codes**

This section provides the procedure for deleting a call work code from the CMS database.

To delete a call work code:

1. From the Controller Window, select **Commands** > **Call Center Administration**.

Supervisor displays the Call Center Administration window.

🖗 Call Center Adminis	tration			?	X
Operations	Reports		Ì		
Operations:	·				.
ACD Groups Call Work Codes					
Change VDN Skill Prefe Split/Skill Call Profile Se	tup				
Trunk Group Assignmer VDN Assignments	its				
VDN Call Profile Setup					
ACD:					
ACD3				<b>v</b>	
<u>S</u> cript				<u>H</u> elp	
		( OK		Cancel	

- 2. In the **Operations:** list, highlight **Call Work Codes**.
- 3. Select OK.

Supervisor displays the Call Work Codes window.

t) Call Center Administration: Call Work Codes	×
Actions Edit Help	
Number of codes allocated: 200	
Number of codes administered: 50	
Call work code(s):	
Not available until a 'Find one' with multiple matches	ACD1

4. Enter the call work code that you want to delete in the **Call work code(s):** field.

#### 5. Select **Actions > Find one**.

If the specified call work code is found in the *CMS* database, the status bar displays the message, **1 matches found**.

### 6. Select Actions > Delete.

The status bar displays **Successful** if the call work code is deleted from the *CMS* database.

# **VDN skill preferences**

A Vector Directory Number (VDN) is an extension number that enables calls to connect to a vector for processing. A VDN is not assigned an equipment location, but is assigned to a vector. A VDN can connect calls to a vector when the calls arrive over an assigned automatic-in trunk group or when calls arrive over a dial-repeating, Direct-Inward-Dialing (DID) trunk group and the final digits match the VDN. The VDN, by itself, may be dialed to access the vector from any extension that is connected to the switch.

Calls use VDN skills for routing based on the preferences that are assigned. The skill preferences are used in the assigned vector as *1st*, *2nd*, and *3rd*.

This section describes the procedures to change the first, second, and third skill preferences assigned to a VDN. You can also list the currently assigned skill preferences for VDNs as well as list all the VDNs that currently have skill preferences assigned to them.

This section contains the following topics:

- Before you begin on page 268
- Permissions on page 269
- <u>Changing VDN skill preferences</u> on page 269
- Viewing VDN skill preferences on page 270
- Listing all VDN skill preferences on page 272

### Before you begin

The following items should be read and understood before working with VDN skill preferences:

- You can only work with VDN skill preferences on a Communication Manager system and the Expert Agent Selection (EAS) feature is present and activated.
- When VDN skill preferences are changed through *Supervisor*, the change takes place immediately on the Communication Manager system. This can affect the processing of calls at the time of the change.
- If the changes to VDN skill preferences should occur at a specific time, they can be run through scripts that can then be scheduled through a third-party scheduling application.

### Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view current VDN skill preferences, the user ID used to log in to this *Supervisor* session requires *read* permission for the Call Center Administration subsystem and the affected VDNs.
- To change VDN skill preferences, the user ID used to log in to this *Supervisor* session requires *write* permission for the Call Center Administration subsystem and the affected VDNs.

# **Changing VDN skill preferences**

This section provides the procedure for changing skill preferences for a VDN. This feature is only available on Communication Manager systems with the Expert Agent Selection (EAS) feature.

### Steps

To change a VDN skill preference:

1. From the Controller Window, select **Commands** > **Call Center Administration**.

Supervisor displays the Call Center Administration window.

🖗 Call Center Adm	inistration			? ×
Operations	Reports	Ì		
Operations:				
ACD Groups Call Work Codes				
Change VDN Skill F	references			
Split/Škill Call Profile Trunk Group Assign				
VDN Assignments VDN Call Profile Se	UD			
	чр			
ACD:				
ACD3			<b>_</b>	
<u>S</u> cript				<u>H</u> elp
		OK		Cancel

- 2. In the **ACD:** field, select the ACD on which VDN skill preferences will be changed.
- 3. In the Operations: list, highlight Change VDN Skill Preferences.

4. Select OK.

Supervisor displays the Change VDN Skill Preferences window.

t) Call Center Administration: Change VDN Skill Preferences	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
VDN(s):	
Skill preferences	
1st:	
2nd:	
3rd:	
	ACD2

- 5. In the VDN(s): field, enter the VDN for which skill preferences are to be changed.
- 6. From the Actions menu, select Find one.

The status bar displays a successful message if the VDN was found.

- 7. Enter skill preferences for the VDN in the **1st:**, **2nd:**, and **3rd:** fields using one of the following methods:
  - Enter the skill name or number.
  - Select the skill name or number from the drop-down list.
  - Use the Browse button at the right of each field to select a skill.
- 8. Select Actions > Modify.

The status bar displays a successful message when the operation completes.

# Viewing VDN skill preferences

This section provides the procedure for viewing skill preferences for a VDN. This feature is only available on Communication Manager systems with the Expert Agent Selection (EAS) feature.

To view one or more existing VDN skill preferences:

1. From the Controller Window, select **Commands** > **Call Center Administration**.

Supervisor displays the Call Center Administration window.

Call Center Administration			? ×
Operations Repor	ts	)	
Operations:			
ACD Groups Call Work Codes			
Change VDN Skill Preferences			
Split/Skill Call Profile Setup Trunk Group Assignments			
VDN Assignments			
VDN Call Profile Setup			
ACD:			
ACD3		•	
Script		Н	elp
	OK	Ca	ncel

- 2. In the ACD: field, select the ACD on which VDN skill preferences will be viewed.
- 3. In the Operations: list, highlight Change VDN Skill Preferences.
- 4. Select OK.

Supervisor displays the Change VDN Skill Preferences window.

🏥 Call Center Administration: Change VDN Skill Preferences	×
Actions Edit Help	
VDN(s):	
Skill preferences	
1st:	
2nd:	
3rd:	
	ACD2

- 5. In the **VDN(s):** field, enter the VDN for which skill preferences are to be viewed.
- 6. From the Actions menu, select Find one.

The status bar displays a successful message if the VDN was found and lists the skill preferences, if any exist for this VDN.

# Listing all VDN skill preferences

This section provides the procedure for listing all skill preferences for a VDN. This feature is only available on switches with the Expert Agent Selection (EAS) feature.

### Steps

To list all VDN skill preferences:

1. From the Controller Window, select **Commands > Call Center Administration**.

Supervisor displays the Call Center Administration window.

🚱 Call Center Adır	inistration		3	2
Operations	Reports	)		
Operations:	,			
ACD Groups Call Work Codes				
Change VDN Skill F				
Split/Škill Call Profil Trunk Group Assign				
VDN Assignments				
VDN Call Profile Se	tup			
1				
ACD:				
ACD3			-	
· · · · · · · · · · · · · · · · · · ·				
<u>S</u> cript			Help	
		Г	Cancel	1

- 2. In the **ACD:** field, select the ACD on which the VDNs and their skill preferences will be viewed.
- 3. In the Operations: list, highlight Change VDN Skill Preferences.
- 4. Select OK.

Supervisor displays the Change VDN Skill Preferences window.

Call Center Administration: Change VDN Skill Preferences	×
Actions Edit Help	
VDN(s):	
Skill preferences	
1st:	
2nd:	
3rd:	
	ACD2

### 5. Select **Actions** > **List all**.

*Supervisor* displays a window listing all VDNs on this ACD and the associated skill preferences.

# Split/skill call profiles

*Call profiles* are settings for a split or skill that assist in determining how much time passes before a call is answered or abandoned. The accumulated number of seconds that have passed for an unanswered call are divided into different service-level increments. If a call surpasses the time that is allowed for the first service-level increment, it then moves to the next service-level increment. This information is recorded for each call and can later be viewed through the split/skill call profile report to determine the number of calls that were answered or abandoned in each increment.

This section contains the following topics:

- Before you begin on page 274
- Permissions on page 275
- <u>Adding split/skill call profiles</u> on page 275
- Viewing an existing split/skill call profile on page 277
- Modifying a split/skill call profile on page 278
- Deleting a split/skill call profile on page 280

### Before you begin

The following items should be read and understood before working with split/skill call profiles:

- Each service-level increment value can be set to a different length of time in seconds.
- Each of the first nine service-level increments can have a different time length and represents a unit of wait time. The number of seconds for the second through the ninth increment must be at least 1 second greater than the number of seconds in the previous increment.
- *CMS* counts the calls that are either answered or abandoned within each increment and shows the totals on split/skill call profile reports. Therefore, the settings of these increments affect what is displayed in reports.
- Making changes to the service level field after data was collected with a different service level value causes reports to give inaccurate data for the **Percent within Service Level** value. If you must change the service level, it is best to change the value at midnight on the first day of a month so that data for the entire month is gathered using the same service level value.

### Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view split/skill call profiles, the user ID used to log in to this *Supervisor* session requires *read* permission for the Call Center Administration subsystem and all affected splits and skills.
- To add, delete, or change a split/skill call profile, the user ID used to log in to this Supervisor session requires write permission for the Call Center Administration subsystem and all affected splits and skills.

# Adding split/skill call profiles

The section provides the procedure for adding a split/skill call profile.

### Steps

To add a split/skill call profile:

1. From the Controller Window, select Commands > Call Center Administration

Supervisor displays the Call Center Administration window.

🚱 Call Center Admi	nistration			? ×
Operations	Reports		)	
Operations:	,			
ACD Groups Call Work Codes Change VDN Skill P Spit/Skill Call Profile Trunk Group Assign VDN Assignments VDN Call Profile Set	Setup ments			
ACD:				
<u>S</u> cript				Help
		OK		Cancel

2. In the **ACD**: field, select the ACD on which the new split/skill call profile will be created.

3. In the Operations: list, highlight Split/Skill Call Profile Setup.

#### 4. Select OK.

Supervisor displays the Split/Skill Call Profile Setup window.

趙 Call Center Admin: Split/Skill Call Profile Setup	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
Split(s)/	
Skill(s):	
Acceptable service level:	
Service level increments (seconds):	
Inc 1 Inc 2 Inc 3 Inc 4 Inc 5	
0 to to to to	
Inc 6 Inc 7 Inc 8 Inc 9 Inc 10 to to to to And Above	
	ACD3

- 5. In the **Split(s)/Skill(s):** field, enter the split or skill numbers or names.
- 6. In the Acceptable service level: field, enter the objective speed of answer for the splits or skills. This field represents the number of seconds for the speed of answer and can accept values from 0 to 9999. This value should be no larger than the number of seconds in the intrahour interval that is set on CMS. For example, 1800 for a half-hour interval or 3600 for an hour-long intrahour interval. You must enter a value in this field.

The following example displays how an administrator might set up a split/skill call profile:

Acceptable service level: 1800				
Service	level increment	s (seconds):		
Inc 1	Inc 2	Inc 3	Inc 4	Inc 5
0 to	5 to 1	15 to 🛛	30 to	60 to 90
Inc 6	Inc 7	Inc 8	Inc 9	Inc 10
to	120 <b>to</b> 1	80 <b>to</b>	240 <b>to</b>	360 and above

The **Acceptable service level:** field, has been set to **1800** seconds to correspond with the intrahour interval on the *CMS* server.

Inc 1 has been set for the range of 0 to 5 seconds. Inc 2 ranges covers 5 to 15 seconds. The other service level increments continue on until Inc 10. This last service level increment is used in this example is for those calls that extend beyond 360 seconds. If a call is not addressed after the acceptable service level of 1800 seconds, the call is then tracked in a different *CMS* database category.

7. In the **Service level increments (seconds):** fields, enter a progressively greater number of seconds in each **to** field. Each field can support values from **0** to **999**.

If the unanswered call surpasses the time limit for an increment, it moves on to the next increment. For example, 0 to 5 to 10 to 25 represents 0 to 5 seconds, 6 to 10 seconds, and 11 to 25 seconds.

Each of the nine increments can vary in length, for example, 0 to 15, 16 to 20, 21 to 26, 27 to 38, 39 to 43, and so forth.

If these fields are not supplied with data, **o** is used for all service level increments and all calls appear in the first increment on the split/skill call profile report.

8. Select Actions > Add.

The status bar displays a message stating if the operation succeeded or failed.

# Viewing an existing split/skill call profile

This section provides the procedure for viewing a split/skill call profile that already exists.

### Steps

To view an existing split/skill call profile:

1. From the Controller Window, select **Commands** > **Call Center Administration**.

Supervisor displays the Call Center Administration window.

Call Center Adn	inistration		?
Dperations	Reports	Ì	
Operations:			
ACD Groups Call Work Codes Change VDN Skill Split/Skill Call Profil Trunk Group Assign VDN Assignments VDN Call Profile Se	e Setup nments		
ACD:			
ACD3			•
<u>S</u> cript			<u>H</u> elp
		(OK	Cancel

2. In the **ACD**: field, select the ACD on which the existing split/skill call profile resides.

3. In the **Operations:** list, highlight **Split/Skill Call Profile Setup**.

#### 4. Select OK.

Supervisor displays the Split/Skill Call Profile Setup window.

Image: Second Structure       Image: Second Structure         Actions       Edit         Help       Image: Second Structure         Image: Second Structure       Image: Second Structure         Image: Second Structure	X
Split(s)/	
Skill(s):	
Acceptable service level:	_
Service level increments (seconds):	
Inc 1 Inc 2 Inc 3 Inc 4 Inc 5 Oto to to to to to	
Inc 6 Inc 7 Inc 8 Inc 9 Inc 10 to to to to And Above	
, , , ,	ACD3

- 5. In the **Split(s)/Skill(s):** field, enter the split or skill that is represented by the call profile to view.
- 6. From the Actions menu, select Find One.

The status bar displays a **Successful** message if the call profile for the specified split or skill is found. Additionally, *Supervisor* populates the **Service Level Increments** (seconds): fields with the service level increments for this call profile.

# Modifying a split/skill call profile

This section provides the procedure for modifying a call profile for a split or skill.

To modify a split/skill call profile:

1. From the Controller Window, select **Commands** > **Call Center Administration**.

Supervisor displays the Call Center Administration window.

🚱 Call Center Administr	ation		?	X
Operations	Reports			
Operations:				
ACD Groups Call Work Codes Change VDN Skill Prefer Split/Skill Call Profile Setu Trunk Group Assignments VDN Assignments	φ			
VDN Call Profile Setup				
ACD: ACD3			-	
<u>S</u> cript			<u>H</u> elp	
		(OK	Cancel	Γ

- 2. In the ACD: field, select the ACD on which the split/skill call profile to modify resides.
- 3. In the Operations: list, highlight Split/Skill Call Profile Setup.
- 4. Select OK.

Supervisor displays the Split/Skill Call Profile Setup window.

鶴 Call Center Admin: Split/Skill Call Profile Setup	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
Split(s)/	
Skill(s):	
Acceptable service level:	_
Service level increments (seconds):	
Inc 1 Inc 2 Inc 3 Inc 4 Inc 5	
0 to to to to	
Inc 6 Inc 7 Inc 8 Inc 9 Inc 10 to to And Above	
to to to And Above	
	ACD3

- In the Split(s)/Skill(s): field, enter the split or skill on which the call profile to modify resides.
- 6. From the **Actions** menu, select **Find One**.

The status bar displays a **Successful** message if the call profile for the specified split or skill is found. Additionally, *Supervisor* populates the **Service Level Increments** (seconds): fields with the service level increments for this call profile.

- 7. Enter the new values in the Acceptable service level: or the Service level increments (seconds): fields.
- 8. From the Actions menu, select Modify.

The status bar displays a **Successful** message when the operation completes.

### Deleting a split/skill call profile

This section provides the procedure for deleting a split/skill call profile.

### Steps

To delete an existing split/skill call profile:

1. From the Controller Window, select **Commands** > **Call Center Administration**.

Supervisor displays the Call Center Administration window.

🚱 Call Center Administr	ation		? ×
Operations	Reports		
Operations:			
ACD Groups Call Work Codes Change VDN Skill Prefere	ences		
Split/Skill Call Profile Setu Trunk Group Assignments	φ		
VDN Assignments VDN Call Profile Setup			
ACD:			
ACD3			•
<u>S</u> cript			Help
	Ĩ	OK	Cancel

2. In the ACD: field, select the ACD on which the split/skill call profile to delete resides.

3. In the **Operations:** list, highlight **Split/Skill Call Profile Setup**. *Supervisor* displays the **Split/Skill Call Profile Setup** window.

Image: Call Center Admin: Split/Skill Call Profile Setup         Actions       Edit         Help         Image: Call Center Admin: Split/Skill Call Profile Setup         Actions       Edit         Help         Image: Call Center Admini: Split/Skill Call Profile Setup         Image: Call Center Admini: Split/Skill Call Profile Setup         Actions       Edit         Help         Image: Call Center Admini: Split/Skill Call Profile Setup         Image: Call Center Administry Science Administr	×
Split(s)/ Skill(s):	
Acceptable service level:	
Service level increments (seconds): Inc 1 Inc 2 Inc 3 Inc 4 Inc 5 0 to to to to to to to	
Inc 6 Inc 7 Inc 8 Inc 9 Inc 10 to to to And Above	
	ACD3

- 4. In the **Split(s)/Skill(s):** field, enter the split or skill on which the call profile to delete resides.
- 5. From the Actions menu, select Find One.

The status bar displays a **Successful** message if the call profile for the specified split or skill is found. Additionally, *Supervisor* populates the **Service Level Increments** (seconds): fields with the service level increments for this call profile.

6. From the Actions menu, select Delete.

*Supervisor* deletes the specified split/skill call profile and displays a **Successful** message in the status bar.

# Trunk group assignments

A *trunk group* is a group of circuits that are assigned the same dialing digits, either a telephone number or a Direct-Inward-Dialing (DID) prefix. Trunk groups can be assigned to Vector Directory Numbers (VDNs) or non-vector-controlled splits.

This section contains the following topics:

- Before you begin on page 282
- Permissions on page 282
- <u>Viewing all trunk group assignments</u> on page 283
- Viewing a single trunk group assignment on page 284
- Viewing a trunk group assignment by VDN or split on page 285

### Before you begin

The following items should be read and understood before working with trunk group assignments:

- Automatic-in trunk groups, such as those that are used as Listed Directory Numbers, must be assigned to VDNs or splits through an administration tool for the Communication Manager system.
- DID or dial-repeating trunks, such as those that toll-free numbers are assigned to, are not assigned to VDNs or splits since the Central Office (CO) passes VDN digits or the split extension number to the Communication Manager system. Because of this, toll-free numbers do not appear during these procedures.
- Vector-controlled splits cannot have trunk groups assigned to them because they can only receive calls through vector processing.
- The **Trunk Group Assign** window used in these procedures cannot be used to change trunk group assignments. Changing trunk group assignments is done through an administration tool for the Communication Manager system.

### Permissions

To view trunk group assignments, the user ID used to log in to this *Supervisor* session requires *read* permission for the Call Center Administration subsystem and for all affected trunk groups, splits, and VDNs.

# Viewing all trunk group assignments

This section provides the procedure for viewing all trunk group assignments.

### Steps

To view all trunk group assignments:

1. From the Controller Window, select **Commands** > **Call Center Administration**.

Supervisor displays the Call Center Administration window.

👰 Call Center Administi	ation			? ×
Operations	Reports	)		
Operations:				
ACD Groups Call Work Codes				
Change VDN Skill Prefere				
Split/Skill Call Profile Setu Trunk Group Assignment:				
VDN Assignments VDN Call Profile Setup				
ACD:				
ACD3			<u> </u>	
<u>S</u> cript				<u>H</u> elp
		OK		Cancel

- 2. In the ACD: field, select the ACD on which trunk group assignments are to be viewed.
- 3. In the **Operations:** list, highlight **Trunk Group Assignments**.
- 4. Select OK.

Supervisor displays the Trunk Group Assign window.

創 Call Center Admin: Trunk Group Assign	X
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
Trunk Groups:	
Select one:	
O VDN:	
O Split:	9
Exit the window	ACD3

5. With all fields blank, select **Actions** > **List All**.

*Supervisor* displays the **Trunk Group Assignments - List All** window showing all trunk groups and their current assignments.

To clear all fields of information, select **Edit** > **Clear all**.

# Viewing a single trunk group assignment

This section provides the procedure for viewing the assigned VDN or split for a single trunk group.

### Steps

To view the assigned VDN or split for a single trunk group:

1. From the Controller Window, select **Commands** > **Call Center Administration**. *Supervisor* displays the **Call Center Administration** window.

Call Center Adr	ninistration			?
Operations	Reports	)		
Operations:	r			
ACD Groups Call Work Codes				
Change VDN Skill				
Split/Skill Call Profi Trunk Group Assig				
VDN Assignments				
VDN Call Profile Se	tup			
,				
ACD:				
ACD3			-	
Script			Help	1
			<u> </u>	
		·····	Cancel	1

- 2. In the ACD: field, select the ACD for which trunk group assignments are to be viewed.
- 3. In the Operations: list, highlight Trunk Group Assignments.
- 4. Select OK.

Supervisor displays the Call Center Admin: Trunk Group Assign window.

🏥 Call Center Admin: Trunk Group Assign	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
Trunk Groups:	
Select one:	
• VDN:	
O Split:	
Exit the window	ACD3

5. In the **Trunk Groups:** field, enter the trunk group for which assignments are to be viewed. More than one trunk group can be entered in this field. Multiple trunk groups must be separated with a semicolon (;).

#### 6. Select **Actions** > **Find One**.

The VDN or split assignment for the specified trunk group is displayed in the corresponding field.

If a VDN or split is not assigned to this trunk group, the status bar displays **0 matches found**.

### Viewing a trunk group assignment by VDN or split

This section provides the procedure for viewing the trunk group that is assigned to a specific VDN or split.

#### Steps

To view the trunk group that is assigned to a VDN or skill:

1. From the Controller Window, select **Commands** > **Call Center Administration**.

Supervisor displays the Call Center Administration window.

Call Center Adm	inistration		?
Operations	Reports		
Operations:			
ACD Groups Call Work Codes			
Change VDN Skill F	references		
Split/Skill Call Profile	Setup		
Trunk Group Assign VDN Assignments	ments		
VDN Call Profile Se	up		
I			
100			
ACD:			
ACD3			
<u>S</u> cript			<u>H</u> elp
		OK	Cancel

2. In the **ACD:** field, select the ACD for which trunk group assignments are to be viewed.

3. In the **Operations:** list, highlight **Trunk Group Assignments**.

### 4. Select OK.

Supervisor displays the Trunk Group Assign window.

鶴 Call Center Admin: Trunk Group Assign	X
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
Trunk Groups:	
Select one:	
• VDN:	
O Split:	E
Exit the window	ACD3

- 5. Either a VDN or split can be specified to display the trunk group or groups assigned to it.
  - To display the trunk groups that are assigned to a VDN:
    - i. In the Select one: group, select VDN:.
    - ii. Enter the VDN number or name in the field for the **VDN**: option.
  - To display the trunk groups that are assigned to a split:
    - i. In the Select one: group, select Split:.
    - ii. Enter the split number or name in the field for the **Split:** option.
- 6. Select Actions > Find one.

*Supervisor* displays the first trunk group that is assigned to the specified VDN or split in the **Trunk Groups:** field. If more trunk groups are currently assigned, click the **Next** button to view them.

# **Trunk group members report**

The trunk group members report is used to view the equipment locations of all the trunks that are in a particular trunk group. The report lists the selected trunk groups in numerical order, each trunk group's assigned name, and the equipment location of each trunk in the trunk group. If the trunk group does not have an assigned name, the **Trunk Group Name** field shows the trunk group number. Also, if the trunk group has no trunks assigned to it, the equipment location field is blank.

This section includes the following topics:

- Before you begin on page 287
- Permissions on page 287
- Running a trunk group members report on page 287

### Before you begin

The following items should be read and understood before working with the trunk group members report:

- Custom or designer reports cannot be created from the trunk group members report.
- The link to the Communication Manager system must be active in order to run this report.

### **Permissions**

To run a trunk group members report, the user ID used to log in to this *Supervisor* session requires *read* permission for the Call Center Administration subsystem and all affected trunk groups.

### Running a trunk group members report

To run a trunk group members report:

- 1. From the Controller Window, select **Commands** > **Call Center Administration** *Supervisor* displays the **Call Center Administration** window.
- 2. On the Call Center Administration window, select the Reports tab.

- 3. In the **ACD:** field, select the ACD for which the report will run.
- 4. In the Reports: list, highlight Trunk Group Members.
- 5. Select OK.

Supervisor displays the Trunk Group Members window.

Trunk Group Members		
Destination Vie <u>w</u> Report on Screen Dimit Report on:	ddops3	4
	OK Cancel	Help ACD3

6. In the **Trunk Groups:** field, enter the numbers or names of the trunk groups that are to be used in the report.

Multiple trunk groups must be separated by a semicolon (;).

- 7. In the **Destination** group, select the output option of the report:
  - View Report on Screen The report is displayed on the screen.
  - **Print Report on:** Sends the report to the printer that is specified in the associated field. To change the specified printer, select the **Select printer** button located on the right side of this group.
- 8. Select OK.

Supervisor runs the report and sends it to the specified destination.

		up Men				_ [	X
<u>R</u> eport	Edit	<u>F</u> ormat	lools	<u>O</u> ptions	<u>H</u> elp		
Trupk	Trunk	Group	Jame		Frunk	 	
Group	manne	oroupi	aunic		- Grint		
10	10			0001C12	203		
10	10			0001012	204		
10	10			0001013	202		
10	10			0001012	201		
10	10			0001013	207		
10	10			0001012	205		
10	10			0001C1:	206		
10	10			0001012	208		
10	10			0001C10	002		
10	10			0001C10	003		
10	10			0001C10	001		
10	10			0001C10	008		
10	10			0001C10	)23		
10	10			0001C10	004		
10	10			0001C10	006		
10	10			0001C10	005		
14	t14 ,.+	'AbCdEf	GhljK	0001003	306		-
<u> </u>	OF L T	o Bun Fo			~~~	CD3	

# VDN-to-vector assignments

A Vector Directory Number (VDN) is an extension number that enables incoming calls to be connected to a vector for processing. The VDN by itself may be dialed to access the vector from any extension that is connected to the switch. Initial assignment of a VDN to a vector is done on the Communication Manager system, but can later be changed using *CMS* or *Supervisor*.

This section contains the following procedures:

- Before you begin on page 289
- Permissions on page 290
- <u>Viewing all VDN-to-vector assignments</u> on page 290
- Listing VDNs associated with a vector on page 291
- Modifying VDN-to-vector assignments on page 292

### Before you begin

The following items should be read and understood before working with VDN-to-vector assignments:

- Changing any VDN-to-vector assignments can alter call processing
- Multiple VDNs can be assigned to the same vector.
- VDNs cannot be assigned to more than one vector.
- You cannot exit the VDN-to-vector assignment window until *Supervisor* receives a response to the requested change.
- Calls that are already in vector processing are not affected by a VDN-to-vector change.
- Changing the VDN-to-vector assignment affects the next call that enters the VDN.
- VDN-to-vector assignment changes that are scheduled should either be grouped together in a timetable or individually scheduled so that one assignment completes before the next assignment change request is scheduled.

### Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view VDN-to-vector assignments, the user ID used to log in to this *Supervisor* session requires *read* permission for the Call Center Administration subsystem and for all affected VDNs and vectors.
- To modify VDN-to-vector assignments, the user ID used to log in to this *Supervisor* session requires *write* permission for the Call Center Administration subsystem and for all affect VDNs and vectors.

### Viewing all VDN-to-vector assignments

This section provides the procedure to view all VDN-to-vector assignments.

### Steps

To view all current VDN-to-vector assignments:

1. From the Controller Window, select **Commands** > **Call Center Administration**.

Supervisor displays the Call Center Administration window.

🚱 Call Center Admini	stration		? ×
Operations	Reports	)	
Operations:	·		
ACD Groups Call Work Codes			
Change VDN Skill Pref	erences		
Split/Skill Call Profile S			
Trunk Group Assignme VDN Assignments	nts		
VDN Call Profile Setup			
P			
ACD:			
ACD3			<b>_</b>
, <u> </u>			
<u>S</u> cript			<u>H</u> elp
		OK	Cancel

- 2. In the **ACD:** field, select the ACD for which VDN-to-vector assignments are to be viewed.
- 3. In the **Operations:** list, highlight **VDN Assignments**.

Supervisor displays the VDN Assignments window.

創 Call Center Admin: VDN Assignments	X
Actions Edit Help	
VDNs:	
Vector:	
	ACD3

5. Select Actions > List all from the menu bar.

Supervisor displays a secondary window that lists all VDNs for which this user ID has *read* permission.

## Listing VDNs associated with a vector

This section provides the procedure for listing the VDNs that are associated with a specific vector.

#### Steps

To list the VDNs that are associated with a specific vector:

1. From the Controller Window, select **Commands** > **Call Center Administration**.

Supervisor displays the Call Center Administration window.

🛛 Call Center Admi	nistration		?
Operations	Reports		
Operations:	, i i i i i i i i i i i i i i i i i i i		
ACD Groups Call Work Codes			
Change VDN Skill Pi	eferences		
Split/Škill Call Profile	Setup		
Trunk Group Assignr VDN Assignments	nents		
VDN Call Profile Set	a		
<u> </u>	•		
ACD:			
ACD3			হ
TACD3			
Script			<u>H</u> elp

- 2. In the ACD: field, select the ACD on which the vector resides.
- 3. In the **Operations:** list, highlight **VDN Assignments**.

Supervisor displays the VDN Assignments window.

劇 Call Center Admin: VDN Assignments	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
VDNs:	
Vector:	
	ACD3

- 5. In the Vector field, enter the name or number of the vector.
- 6. Select Actions > List all from the menu bar.

*Supervisor* displays a secondary window that lists all VDNs assigned to the specified vector.

### Modifying VDN-to-vector assignments

This section provides the procedure for modifying the current VDN-to-vector assignments. Remember that VDNs can only be assigned to vectors initially through administrative utilities that are available only on Communication Manager system.

### Steps

To modify the assignment of a VDN to a vector:

1. From the Controller Window, select **Commands > Call Center Administration**.

Supervisor displays the Call Center Administration window.

Call Center Administration		? ×
Operations Repo	irts	)
Operations:		
ACD Groups Call Work Codes		
Change VDN Skill Preferences		
Split/Škill Call Profile Setup Trunk Group Assignments		
VDN Assignments VDN Call Profile Setup		
ACD:		
ACD3		I
<u>S</u> cript		Help
	OK	Cancel

2. In the ACD: field, select the ACD on which the VDNs and vectors reside.

- 3. In the **Operations:** list, highlight **VDN Assignments**.
- 4. Select OK.

Supervisor displays the VDN Assignments window.

t) Call Center Admin: VDN Assignments	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
VDNs:	
Vector:	
	ACD3

- 5. In the VDNs: field, enter the name or number of the VDN that is to be reassigned.
- 6. Select Actions > Find one from the menu bar.

*Supervisor* displays the vector to which this VDN is currently assigned in the **Vector**: field.

- 7. In the **Vector:** field, enter the new vector for the specified VDN.
- 8. Select Actions > Modify from the menu bar.

The status bar displays a **Successful** message once the operation completes.

# **VDN** call profiles

*Call profiles* are time ranges for a VDN that *CMS* uses to track how much time passes before a call is resolved by being answered, connected to a non-ACD destination, or abandoned. *CMS* refers to these time ranges as *service-level increments*. The accumulated number of seconds that pass for an unanswered call are divided into different service-level increments. If a call surpasses the time that is allowed for the first service-level increment, it then moves to the next service-level increment. This information is recorded for each call and can later be viewed through the VDN call profile reports to determine the number of calls that were addressed in each increment.

This section contains the following procedures:

- Before you begin on page 294
- Permissions on page 295
- <u>Adding a VDN call profile</u> on page 295
- <u>Viewing an existing VDN call profile</u> on page 297
- Modifying a VDN call profile on page 298
- Deleting a VDN call profile on page 300

### Before you begin

The following items should be read and understood before work is done with VDN call profiles.

- When installed, *CMS* sets all service-level increments to 0 by default. This causes all calls to appear in the first increment on the VDN call profile report.
- Each service level can be set to different lengths of time.
- Service-level increments can only be used to categorize a call to a maximum limit of 999 seconds.
- The number of seconds for the second through the ninth increment must be at least 1 second greater than the number of seconds in the previous increment. For example, if the second increment covers the range of 5 to 10 seconds, the maximum value in the third increment must be set to 11 or greater.
- Making changes to the service level field after data was collected with another service level value causes reports to give inaccurate data for the **Percent within Service Level** value. If you must change the service level, it is best to change the value at midnight on the first day of a month so that data for the entire month is gathered using the same service level value.

### Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view a VDN call profile, the user ID used to log in to this *Supervisor* session requires *read* permission for the Call Center Administration subsystem and all affected VDNs.
- To add, delete, or change a VDN call profile, the user ID used to log in to this *Supervisor* session requires *write* permission for the Call Center Administration subsystem and all affected VDNs.

# Adding a VDN call profile

This section provides the procedure for adding a VDN call profile to an ACD.

### Steps

To add a VDN call profile:

1. From the Controller Window, select **Commands** > **Call Center Administration**. *Supervisor* displays the **Call Center Administration** window.

🖗 Call Center Administration		? ×
Operations Reports	Ì	
Operations:		
ACD Groups Call Work Codes		
Change VDN Skill Preferences		
Split/Skill Call Profile Setup Trunk Group Assignments		
VDN Assignments		
VDN Call Profile Setup		
ACD:		
ACD3		<b>•</b>
<u>S</u> cript		<u>H</u> elp
	OK.	Cancel

2. In the **ACD**: field, select the ACD on which the VDN call profile will be added.

3. In the **Operations:** list, highlight **VDN Call Profile Setup**.

Supervisor displays the VDN Call Profile Setup window.

鶴VDN Call Profile Setup	
Actions Edit Help	
VDNs:	•
Acceptable service level:	
Service level increments (seconds):	
Inc 1 Inc 2 Inc 3 Inc 4 Inc 5	
O to to to to to	
Inc 6 Inc 7Inc 8Inc 9Inc 10	
to to to and above	
	ACD1

- 5. In the **VDNs:** field, enter the name or number of the VDN which will have a new call profile.
- 6. In the **Acceptable service level:** field, enter the maximum number of seconds in which a VDN call should be addressed.

This value can range from **0** to **3600**. However, the value should be no larger than the number of seconds in the intrahour interval that is set on

*CMS*, for example, **1800** for a half-hour intrahour interval or **3600** for an hour-long intrahour interval.

7. In each **Service level increments (seconds):** field, enter a progressively larger number of seconds in each **to** field.

The following example shows how an administrator might set up a VDN call profile:

Acceptable	service leve	l: 1800	j	
Service leve	l increments	(seconds)	:	
Inc 1	Inc 2	Inc 3	Inc 4	Inc 5
0 to 5	to 1	5 to	30 <b>to</b>	60 to 90
Inc 6	Inc 7	Inc 8	Inc 9	Inc 10
to 12	D to 18	30 to	240 <b>to</b>	360 and above

The **Acceptable service level:** field, is set to **1800** seconds to correspond with the intrahour interval that is used on the *CMS* server.

**Inc 1** is set to a range of  $0 \pm 5$  seconds. **Inc 2** ranges is set to a range of  $5 \pm 0.15$  seconds. If the call is not resolved, *CMS* continues to process the call through the other service-level increments until **Inc 10**. The **Inc 10** service-level increment is used in this example for those calls that extend beyond 360 seconds. If a call is not addressed after the acceptable service level of 1800 seconds, the call is then tracked in a different *CMS* database category.

8. Select **Actions** > **Add** from the menu bar.

The status bar displays a **Successful** message when the operation completes.

## Viewing an existing VDN call profile

This section provides the procedure for viewing a VDN call profile that already exists on an ACD.

### Steps

To view an existing VDN call profile:

1. From the Controller Window, select **Commands** > **Call Center Administration**.

Supervisor displays the Call Center Administration window.

👰 Call Center Adm	inistration		? >
Operations	Reports		
Operations:			
ACD Groups Call Work Codes Change VDN Skill F Split/Skill Call Profile Trunk Group Assign VDN Assignments VDN Call Profile Sel	e Setup ments		
ACD:			<b>_</b>
<u>S</u> cript			<u>H</u> elp
		OK.	Cancel

- 2. In the **ACD**: field, select the ACD on which the VDN call profile will be added.
- 3. In the **Operations:** list, highlight **VDN Call Profile Setup**.

Supervisor displays the VDN Call Profile Setup window.

t鼬 VDN Call Profile Setup	
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
VDNs:	•
Acceptable service level:	
Service level increments (seconds):	
Inc 1 Inc 2 Inc 3 Inc 4 Inc 5	
O to to to to to	
Inc 6 Inc 7 Inc 8 Inc 9 Inc 10	
to to to and above	
	ACD1

- 5. In the **VDNs:** field, enter the name or number of the VDN for which the associated call profile is to be viewed.
- 6. Select Actions > Find one from the menu bar.

*Supervisor* populates the remaining fields on the **VDN Call Profile Setup** window with the call profile settings for this VDN. If no call profile has been created for this VDN, the **Service level increments (seconds):** values are set to **0**.

## Modifying a VDN call profile

This section provides the procedure for modifying a VDN call profile that already exists on an ACD.

### Steps

To modifying an existing VDN call profile:

1. From the Controller Window, select **Commands** > **Call Center Administration**.

Supervisor displays the Call Center Administration window.

🖗 Call Center Adr	ninistration				? ×
Operations	Reports		)		
Operations:					
ACD Groups Call Work Codes Change VDN Skill Split/Skill Call Profi Trunk Group Assig VDN Assignments VDN Call Profile Se	e Setup nments				
ACD:					
ACD3				<u> </u>	
<u>S</u> cript				<u>H</u> elp	
		OK		Cancel	

- 2. In the ACD: field, select the ACD on which the VDN call profile will be modified.
- 3. In the **Operations:** list, highlight **VDN Call Profile Setup**.
- 4. Select OK.

Supervisor displays the VDN Call Profile Setup window.

鶴 VDN Call Profile Setup	
Actions Edit Help	
VDNs:	
Acceptable service level:	
Service level increments (seconds):	
Inc 1Inc 2Inc 3Inc 4Inc 5	
O to to to to to	
Inc 6 Inc 7 Inc 8 Inc 9 Inc 10 to to to to to and above	
	ACD1

- 5. In the **VDNs:** field, enter the name or number of the VDN for which the associated call profile is to be modified.
- 6. Select **Actions > Find one** from the menu bar.

*Supervisor* populates the remaining fields on the **VDN Call Profile Setup** window with the call profile settings for this VDN. If no call profile has been created for this VDN, the **Service level increments (seconds):** values are set to **0**.

7. Enter new values in the appropriate fields:

- Enter a new value in the **Acceptable service level** field to match the intrahour interval that is set on the *CMS* server.
- Enter new ranges of time in the **Service level increments (seconds):** fields as needed.
- 8. Select Actions > Modify from the menu bar.

The status bar displays a **Successful** message when the operation completes.

### **Deleting a VDN call profile**

This section provides the procedure for deleting an existing VDN call profile on an ACD.

### Steps

To delete an existing VDN call profile:

1. From the Controller Window, select **Commands** > **Call Center Administration**.

Supervisor displays the Call Center Administration window.

🖗 Call Center Adm	inistration			? ×
Operations	Reports		)	
Operations:	,			
ACD Groups				
Call Work Codes Change VDN Skill F	references			
Split/Škill Call Profile	e Setup			
Trunk Group Assign VDN Assignments	ments			
VDN Call Profile Se	up			
1				_
400				
ACD:				í -
ACD3			<u> </u>	
<u>S</u> cript				<u>H</u> elp
		OK		Cancel

- 2. In the ACD: field, select the ACD on which the VDN call profile will be deleted.
- 3. In the **Operations:** list, highlight **VDN Call Profile Setup**.

Supervisor displays the VDN Call Profile Setup window.

t的 VDN Call Profile Setup	
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
VDNs:	
Acceptable service level:	
Service level increments (seconds):	
Inc 1Inc 2Inc 3Inc 4Inc 5	
O to to to to	
Inc 6 Inc 7 Inc 8 Inc 9 Inc 10 to to to to to and above	
	ACD1

- 5. In the **VDNs:** field, enter the name or number of the VDN for which the associated call profile is to be deleted.
- 6. Select **Actions > Find one** from the menu bar.

Supervisor displays the call profile data for the selected VDN in the Acceptable service level: and Service level increments (seconds): fields.

7. Select **Actions > Delete** from the menu bar.

The status bar displays a **Successful** message when the operation completes.

# **Vector configuration report**

Vector configuration reports display the following items that are associated with a vector:

- Trunk group
- Trunk group name
- VDN
- VDN name
- Vector
- Vector name
- 1st, 2nd, and 3rd skill preferences
- 1st, 2nd, and 3rd skill names

This section contains the following topics:

- Before you begin on page 302
- Permissions on page 303
- Running vector configuration reports on page 303

### Before you begin

The following items should be read and understood before running vector configuration reports:

- A vector may appear in a report even if it is not associated with a trunk group or VDN.
- A vector may appear in a report even if it does not contain any steps.
- A custom or designer report cannot be created from a vector configuration report.
- A go to vector step can cause a trunk group or VDN to carry calls to another vector to which the VDN being used is not assigned. Trunk groups and VDNs that carry calls to a secondary vector in this manner do not appear in the vector configuration report for those secondary vectors.

### Permissions

Depending on the procedure that you want to perform, you need the following permissions:

• To view a vector configuration report, the user ID used to log in to this *Supervisor* session requires *read* permission for the Call Center Administration subsystem and all vectors to be listed on the report. Permissions are not required for the trunk groups and VDNs that are associated with the specified vectors.

## **Running vector configuration reports**

This section provides the procedure for running a vector configuration report.

### Steps

To run a vector configuration report:

1. From the Controller Window, select **Commands** > **Call Center Administration**.

Supervisor displays the Call Center Administration window.

🚱 Call Center Administra	ation				? ×
Operations	Reports		1		
Reports:					_
Trunk Group Members Vector Configuration					-11
					- 8
					- 8
					- 8
1					- 1
ACD:					
Test1				-	
<u>S</u> cript				Help	
		(OK		Cancel	

- 2. Select the Reports tab.
- 3. In the **ACD:** field, select the ACD containing the vector on which the report will be run.
- 4. In the **Reports** list, highlight **Vector Configuration**.

Supervisor displays the Vector window.

Vector	× E	_ [ ] ×
Destination © Vie <u>w</u> Report on Screen © Print Report on:	ddops3	4
	OK Cancel	Help Jaeger1G32

6. In the **Vectors:** field, enter the name or number of the vector for which the report will be run.

Multiple vectors can be entered in this field but must be separated by a semicolon (;).

- 7. In the **Destination** group, select the output option of the report:
  - View Report on Screen The report is displayed on the screen.
  - **Print Report on:** Sends the report to the printer that is specified in the associated field. To change the specified printer, select the **Select printer** button located on the right side of this group.
- 8. Select OK.

Supervisor runs the report and sends it to the specified destination.

🖉 Vect	or											_ 🗆	>
<u>R</u> eport	<u>E</u> dit <u>F</u> orma	at <u>T</u> ools	<u>O</u> ptions <u>H</u> elp										
			1		1	-		_		-	1		_
Trunk	Trunk	VDN	VDN Name	Vector	Vector	1st	1 st Skill	2nd	2nd Skill	3rd	3rd Skill		ł
Group	Group				Name	Skill	Name	Skill	Name	Skill	Name		1
	Name					Pref		Pref		Pref		_	
		40030	VDN 40030	5	Vector 5	5	Skill 5	0	0	0	0		
		40040	VDN 40040	5	Vector 5	5	Skill 5	0	0	0	0		
		40050	VDN 40050	5	Vector 5	0	0	0	0	0	0		
		40020	VDN 40020	5	Vector 5	5	Skill 5	0	0	0	0		
		40010	VDN 40010	5	Vector 5	5	Skill 5	0	0	0	0		
		40060	VDN 40060	6	Vector 6	0	0	0	0	0	0		
		40070	VDN 40070	7	Vector 7	0	0	0	0	0	0		
		40080	VDN 40080	8	Vector 8	0	0	0	0	0	0		
		40100	VDN 40100	10	Vector 10	0	0	0	0	0	0		
		40110	VDN 40110	11	Vector 11	0	0	0	0	0	0		
		40120	VDN 40120	12	Vector 12	0	0	0	0	0	0		
		40130	VDN 40130	13	Vector 13	0	0	0	0	0	0		
		40140	VDN 40140	14	Vector 14	0	0	0	0	0	0		
		40150	VDN 40150	15	Vector 15	0	0	0	0	0	0		
				1	Vector 1	0	0	0	0	0	0		
				2	Vector 2	0	0	0	0	0	0		
				3	Vector 3	0	0	0	0	0	0		
				-	V		· · · · · ·		· · · · · ·	-	· · · · · ·		ri T
											Da	ids22R6ve	

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# **Chapter 8: Administering exceptions**

This section provides the procedures for administering exceptions, running the Real-time Exception Log report, and running other exception reports for the following exception areas:

- Agent
- Split/skill
- Trunk group
- VDN
- Vector
- Data Collection
- Malicious call trace
- Real-time exceptions log

This section contains the following topics:

- About exceptions on page 306
- Before you begin on page 309
- Permissions on page 310
- Exception notification on page 311
- <u>Agent exceptions</u> on page 312
- Split/skill exceptions on page 325
- Trunk group exceptions on page 337
- VDN exceptions on page 348
- <u>Vector exceptions</u> on page 360
- Data collection exceptions report on page 371
- Malicious call trace report on page 374
- <u>Real-time exceptions log</u> on page 377

# **About exceptions**

An *exception* is a type of activity in the ACD that falls outside the limits that have been defined and could indicate unacceptable performance. Exceptions are gathered on agents, splits/skills, trunk groups, VDNs, vectors, and unusual events such as Malicious Call Trace and disruptions in data collection. This chapter describes the operations, prerequisites, and rules for administering exceptions and the different types of exception reports that are available.

You can administer exceptions and generate reports for VDNs and vectors if your company has purchased the Call Vectoring feature.

You can administer exceptions and generate reports for skills if your company has purchased the Expert Agent Selection (EAS) feature.

This section includes the following topics:

- Types of Exceptions on page 306
- Notification on page 307
- Exception capacities on page 308

### **Types of Exceptions**

An exception can be one of three types:

- Peg count
- Agent timed
- Other timed exceptions

#### **Peg count exceptions**

A peg count exception occurs when the number of occurrences of an ACD activity exceeds an occurrence threshold that is defined for your contact center in the current interval.

The current interval is a set number of either 15, 30, or 60 minutes. Many *CMS* exceptions are measured based on this interval.

Most exception conditions apply to ACD events that occur within the current interval that is defined for your contact center. When the current interval changes, ACD event occurrences are cleared and *CMS* begins to count event occurrences again. Therefore, your exception conditions should realistically reflect what you want to trigger an exception within your current interval.

### Agent timed exceptions

Agent timed exceptions are tracked from the time that the agent logs in until the agent logs out. These exceptions can occur many times during the login period and within an interval. The exception count is cleared when the agent leaves the state that triggered the exception.

For example, an agent timed exception could be configured to occur whenever an agent spends more than 5 minutes in the AUX work mode. Then, when an agent spends longer than 5 minutes in the AUX work mode, an exception is triggered for that agent. When the agent changes to another state, such as AVAIL, the exception is reset so that it can occur again when the agent reenters the AUX work mode.

#### Other timed exceptions

Other timed exceptions are triggered when the number of ACD activity occurrences exceeds the minimum or maximum time limits that are set for such activity.

For example, you may set the time limit at 20 seconds for any call to wait in queue before being answered. You may then define an occurrence boundary of three for the acceptable number of calls that can wait in the queue for 20 seconds. An exception occurs if more than three calls wait in the queue longer than 20 seconds within an interval.

Timed occurrence boundaries for this type of exception apply to ACD activity within the last interval. At the beginning of the next interval, the occurrence count for any timed exception type, except for agent timed exceptions, is cleared and starts again from zero. However, since the time limit for a timed exception type can be more than 1 hour, the duration of an exception activity is not cleared at the end of the intrahour interval. *CMS* continues to track the time that is spent on an exception activity that continues from one interval to the next for this type of exception.

### Notification

The status bar of the *Supervisor* Controller window shows the current exception total for both the peg count and time exceptions. This exception total is for all of the ACDs for which you have permission to view exceptions. The exception count is cleared at the end of each interval and can display a maximum number of 9999.

The PC on which *Supervisor* is running is, by default, configured to beep each time an exception occurs. Changing this setting can be done by selecting **Options** > **General** on the *Supervisor* menu bar.

### **Exception capacities**

*CMS* requires that storage space be defined on the server for the purpose of recording the activities of the contact center. The recording of exceptions also uses this storage space. The following items provide information on the limits for recording exceptions:

- *CMS* can store a maximum of 2000 exception records of each element on all ACDs. Therefore, your contact center can store up to 2000 agent, 2000 split/skill, 2000 trunk group, 2000 VDN, and 2000 vector exception records across all ACDs.
- Exception retrieval capacity is the number of days in the past for which you can retrieve exceptions. This is determined by the following criteria:
  - The number of exception records that are allocated for storage in the **Data Storage** operation in the **System Setup** window. The maximum number of exception records of each entity that can be stored is 2000 across all ACDs.
  - The frequency with which exceptions are recorded each day. For example, if you allocate storage for 1000 exception records and approximately 100 exceptions occur each day, you can save exception records for nearly 10 days.

# Before you begin

The following items should be read and understood before you begin working with exceptions:

 If an ACD Group is selected as the current ACD in the Exceptions window, only those operations that are valid for the ACD Group will appear in the Operations: list.

### **Rules for administering exceptions**

When exception thresholds are configured, the following rules must be followed:

- The occurrence threshold for any exception must be between 0 to 999.
- The time limit for timed exceptions must be between 0 to 28800 seconds.
- If a time limit is entered for an activity, an occurrence threshold for that activity must also be entered.
- When an exception is made active, *CMS* starts checking for the exception immediately as long as data collection is activated.
- When at least one exception is added to an entity, any future additions must be made by using the **Modify** item on the **Action** menu.
- When exceptions are being modified, the **Find one** menu item should always be used to retrieve the current settings for the exception before any changes are made.
- The default setting for most exceptions is *off*. However, the following exceptions are always active and cannot be stopped:
  - Malicious call trace
  - Data collection disruptions
  - Audio difficulty
  - Agent attempts to log in with more than one login ID

# Permissions

The following table describes the permission settings that are required in order for a user to access exception information:

Does the user have <i>read</i> permission for the Exceptions feature?	and exceptions permission for splits/skills, trunk groups, ACDs, vectors, and VDNs?	Then, the user can use the following exception information:
yes	yes	<ul> <li>Exception reports</li> <li>Messages in the Real-Time Exception Log</li> <li>Real-time notification of exceptions</li> </ul>
yes	no	Exceptions reports
no	yes	<ul> <li>Real-time notification of exceptions</li> </ul>
no	no	<ul> <li>No exceptions features available to this user</li> </ul>

Setting the exception permissions for these entities can be done through **Tools** > **User Permissions** on the *Supervisor* Controller window.

#### **Other permissions**

To set up or change the method in which the system checks for exceptions, the user ID used to log in to this *Supervisor* session requires the *write* permission for the Exceptions feature.

To be notified of a malicious call exception, the user ID used to log in to this *Supervisor* session requires the *exception* permission for the appropriate contact center entity.

# **Exception notification**

An *exception notification* is a beep that is sounded by *Supervisor* when an exception is encountered. By default, this occurs when the user who is currently logged in to *Supervisor* has the *exceptions* permission for the entity on which the exception occurred. If you do not want *Supervisor* to beep when an exception occurs, follow the procedure in this section.

This section contains the following topic:

Changing exception notification on page 311

### **Changing exception notification**

This section provides the procedure for changing whether the beep notification is sounded when an exception occurs.

#### Steps

To change the exception notification:

1. From the Controller window, select **Tools > Options**.

Supervisor displays the **Options** window.

Report Colors CMS Servers	S Threshold Colors	Name Format	? ×
レ マ マ Note: F	t calendar day, default ACD, and other First Day of Week: Sunday Default ACD: Bison 36 Synchronize PC to CMS Time at Login Use Sound Use I coltips Display Taskbar I con Window Menu Sort Order: Start Order Alghabetical irst Day of Week affects only calendar of Start of Week day for Weekly data co	Sype	
		Help	Ш
	OK	Cancel Apply	

2. Select the General tab.

3. Perform one of the following actions:

• To activate exception notification, place a check mark in the **Use Sound** check box.

- To turn off exception notification, remove the check mark in the **Use Sound** check box.
- 4. Select OK.

# Agent exceptions

Agent exceptions can occur for many different activities in relation to an agent. These can include the amount of time on a call or in a work state, the number of calls that an agent has in queue, and other activities. This section provides the procedure for configuring if and when these exceptions are checked by *CMS*.

This section contains the following topics:

- Before you begin on page 312
- Permissions on page 313
- Adding agent exceptions on page 313
- Modifying agent exceptions on page 315
- Deleting agent exceptions on page 317
- Agent exception definitions on page 319
- Agent exceptions report on page 321

### Before you begin

The following items should be read and understood before working with agent exceptions:

- Agent exceptions are assigned per split/skill and not for each agent. When an agent logs into a split/skill, any exceptions that are configured for that split/skill are applied to the agent.
- *External outbound exceptions* are a subset of *outbound exceptions*. If both types of exceptions are administered, the limit for external outbound covers external outbound calls and the limit for outbound covers only internal outbound calls.
- The agent exceptions record for a split/skill are not created by default in the *CMS* database when the split/skill is created. If a split/skill does not have agent exceptions, an **Add** action must be taken to create the associated agent exceptions record.

### Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view agent exceptions, the user ID used to log in to this *Supervisor* session requires *read* permission for the Exceptions subsystem and all affected splits/skills as well as the *exceptions* permission for the affected splits/skills.
- To add, delete, or modify agent exceptions, the user ID used to log in to this *Supervisor* session requires *write* permission for the Exceptions subsystem and all affected split/ skills as well as the *exceptions* permission for the affected splits/skills.

## Adding agent exceptions

This section provides the procedure for adding agent exceptions for a split/skill.

### Steps

To add agent exceptions for a split/skill:

1. From the Controller window, select **Commands** > **Exceptions** on the menu bar.

Supervisor displays the Exceptions window.

Exceptions				? ×
Operations	Reports		Ì	,
Operations:				
Agent Exceptions				
Real-time Exception Log Split/Skill Exceptions				
Trunk Group Exceptions				
VDN Exceptions Vector Exceptions				
ACD:				
Bison36vpe				<b>•</b>
Script				Help
		OK		Cancel

- 2. In the **ACD:** field, select the ACD for the split/skill where agent exceptions are to be created.
- 3. In the **Operations:** list, highlight **Agent Exceptions**.

Supervisor displays the Agent Exceptions Administration window.

🛕 Agent Ex	ception A	dministration		_ [	IX
<u>Actions</u> <u>E</u> dit					
<b>₽</b> 🔏 🤇	3	\$ \$ \$			
Split(s)/S	kill(s): Sk	ill 5		- 🖪	-
	Time				
Active	Limit	Threshold	Exception Type		
Active	300	2	Time available		
Active	30	0	Time on inbound ACD call (min)		
C Active	7200	0	Time on inbound ACD call (max)		
C Active	600	4	Time in after call work		
Active	7200	1	Time on inbound ACW call		
C Active		20	Number of inbound ACW calls/agen	t	
C Active	3600	1	Time on outbound ACW call		
Active		10	Number of outbound ACW calls/age	nt	
C Active	600	3	Time in AUX work		
Active	7200	2	Time on inbound AUX call		
C Active		30	Number of inbound AUX calls/agent	:	
Active	3600	1	Time on outbound AUX call		
C Active		22	Number of outbound AUX calls/age	nt	
C Active	600	3	Time in AUX with Reason Code 0		
				test	

This window appears with all fields blank when first opened.

#### Note:

This is a scrolling dialog that contains more exceptions than those shown in the above graphic. Use the scroll bar on the right side of the dialog to view the other exceptions.

 In the Split(s)/Skill(s): field, enter the name or number of the split/skill for which an agent exceptions configuration is to be created.

The **Split(s)/Skill(s):** field can accept multiple entries. Each entry must be separated by a semicolon (;).

- 6. Perform the following actions in the specified fields for each **Exception Type** that you want to monitor:
  - Active Place a check mark in this check box to enable the exception and allow it to run and adhere to the parameters that are given in the other fields. Leaving this check box blank disables the exception and *CMS* will not attempt to track the activity for this exception.
  - **Time Limit** Enter the time limit in seconds (0 to 28800) for those exception types that use a time limit. This value is used as the minimum or maximum amount of time for an activity depending on the type of exception. If this limit is surpassed, *CMS*

counts this activity and compares it against the **Threshold** field. This field requires an entry and cannot be left blank.

- **Threshold** Enter the number of acceptable occurrences of this activity (0 to 999). Any occurrences beyond this number will generate an exception. If you want CMS to create an exception on the very first instance, enter **0** in this field. This field requires an entry and cannot be left blank.
- 7. When all necessary time limits and thresholds have been entered, select **Actions** > **Add** from the menu bar.

The exception configuration data will be saved for this split/skill and the status bar displays a **Successful** message.

### Modifying agent exceptions

This section provides the procedure for modifying the existing agent exception configuration for a split/skill.

#### Steps

To modify an existing agent exception configuration:

1. From the Controller window, select **Commands** > **Exceptions**.

Supervisor displays the Exceptions window.

Exceptions				?
Operations	Reports		Ì	
Operations:	·			
Agent Exceptions				
Real-time Exception Log Split/Skill Exceptions				
Trunk Group Exceptions				
VDN Exceptions				
Vector Exceptions				
J				
ACD:				
ACD:				
Bison36vpe				<u> </u>
Script				Help
		OK OK		Cancel

- In the ACD: field, select the ACD on which the split/skill to modify for agent exceptions resides.
- 3. In the **Operations:** list, highlight **Agent Exceptions**.

Supervisor displays the Agent Exceptions Administration window.

Actions Edit		dministration	-		×
Active	Time Limit	Threshold	Exception Type		
Active	300	2	Time available		
Active	30		Time on inbound ACD call (min)		
	<u> </u>	0			
C Active	7200	0	Time on inbound ACD call (max)		Н
C Active	600	4	Time in after call work		Ш
Active	7200	1	Time on inbound ACW call		Ш
C Active		20	Number of inbound ACW calls/agen	t	Ш
C Active	3600	1	Time on outbound ACW call		Ш
Active		10	Number of outbound ACW calls/age	nt	Ш
C Active	600	3	Time in AUX work		Ш
Active	7200	2	Time on inbound AUX call		Ш
C Active		30	Number of inbound AUX calls/agent		Ш
Active	3600	1	Time on outbound AUX call		Ш
C Active		22	Number of outbound AUX calls/age	nt	
C Active	600	3	Time in AUX with Reason Code 0		T
				test	

#### Note:

This is a scrolling dialog that contains more exceptions than those shown in the above graphic. Use the scroll bar on the right side of the dialog to view the other exceptions.

- 5. In the **Split(s)/Skill(s):** field, enter the name or number of the split/skill for which the agent exceptions configuration is to be modified.
- 6. From the menu bar, select **Actions > Find one**.

Supervisor locates the agent exception configuration for the specified split/skill and displays the data in the appropriate fields. If the exception configuration data cannot be found, the status bar displays **0 matches found**.

To return all splits/skills, leave the **Split(s)**:/**Skill(s)**: field blank before performing the **Find one** action. *Supervisor* will return all split(s)/skill(s) for which you have the *read* permission. You can then use the **Next** and **Previous** menu actions to cycle through the splits/skills.

- 7. Perform the following actions in the specified fields for each **Exception Type** that you want to monitor:
  - Active Place a check mark in this check box to enable the exception and allow it to run and adhere to the parameters that are given in the other fields. Leaving this

check box blank disables the exception and *CMS* will not attempt to track the activity for this exception.

- **Time Limit** Enter the time limit in seconds (0 to 28800) for those exception types that use a time limit. This value is used as the minimum or maximum amount of time for an activity depending on the type of exception. If this limit is surpassed, *CMS* counts this activity and compares it against the **Threshold** field. This field requires an entry and cannot be left blank.
- **Threshold** Enter the number of acceptable occurrences of this activity (0 to 999). Any occurrences beyond this number will generate an exception. If you want *CMS* to create an exception on the very first instance, enter **0** in this field. This field requires an entry and cannot be left blank.
- When all necessary time limits and thresholds have been modified, select Actions > Modify from the menu bar.

*Supervisor* updates the data for this split/skill and displays a **Successful** message in the status bar.

### **Deleting agent exceptions**

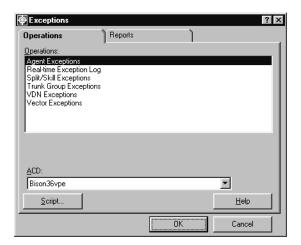
This section provides the procedure for deleting the agent exceptions for a split/skill.

#### Steps

To delete agent exceptions:

1. From the Controller Window, select **Commands > Exceptions**.

Supervisor displays the Exceptions window.



- 2. In the ACD: field, select the ACD on which the split/skill to delete resides.
- 3. In the **Operations:** list, highlight **Agent Exceptions**.

Supervisor displays the Agent Exceptions Administration window.

🛕 Agent Ex	ception A	dministration			×
<u>Actions</u> <u>E</u> dit	t <u>H</u> elp		-		
<u> </u>	<u> </u>				
Split(s)/S	kill(s): Sk	ill 5	1	•	Ĥ
Active	Time Limit	Threshold	Exception Type		
			Time available		
Active	300	2	i me avaliable		
Active	30	0	Time on inbound ACD call (min)		
C Active	7200	0	Time on inbound ACD call (max)		
C Active	600	4	Time in after call work		П
Active	7200	1	Time on inbound ACW call		
C Active		20	Number of inbound ACW calls/agen	t	Н
C Active	3600	1	Time on outbound ACW call		Н
Active		10	Number of outbound ACW calls/age	ent	
C Active	600	3	Time in AUX work		
Active	7200	2	Time on inbound AUX call		
C Active		30	Number of inbound AUX calls/agent	t	
Active	3600	1	Time on outbound AUX call		
C Active		22	Number of outbound AUX calls/age	nt	
C Active	600	3	Time in AUX with Reason Code 0		⊡
				test	

#### Note:

This is a scrolling dialog that contains more exceptions than those shown in the above graphic. Use the scroll bar on the right side of the dialog to view the other exceptions.

- 5. In the **Split(s)/Skill(s):** field, enter the name or number of the split/skill for which an agent exceptions configuration is to be deleted.
- 6. From the menu bar, select **Actions > Find one**.

*Supervisor* locates the agent exception configuration for the specified split/skill and displays the data in the appropriate fields. If exception configuration data cannot be found, the status bar displays **0 matches found**.

To return all splits/skills, leave the **Split(s):/Skill(s):** field blank before performing the **Find one** action. *Supervisor* will return all split(s)/skill(s) for which you have the *read* permission. You can then use the **Next** and **Previous** menu actions to cycle through the splits/skills.

7. From the menu bar, select **Actions > Delete**.

*Supervisor* deletes the agent exception configuration for this split/skill from the *CMS* database and displays a **Successful** message in the status bar.

# Agent exception definitions

The following table provides the definitions for the different agent exceptions:

Exception	Definition
Time available	The time that an agent spends in AVAIL (this is idle time).
Time on inbound ACD call (minimum)	The minimum time that an agent spends on an ACD call.
Time on inbound ACD call (maximum)	The maximum time that an agent spends on an ACD call.
Time in after-call work (maximum)	The maximum time that an agent spends on after-call work.
Time on inbound ACW call (maximum)	The maximum time that an agent spends on an inbound call during after-call work.
Number of inbound ACW calls/agent	The total number of inbound calls that an agent can receive during after-call work. This exception can only be triggered once per interval.
Time on outbound ACW call (maximum)	The maximum time that an agent spends on an outbound call during after-call work.
Number of outbound ACW calls/agent	The total number of outbound calls that an agent can make during after-call work. This exception can only be triggered once per interval.
Time in AUX work (maximum)	The maximum time that an agent spends doing auxiliary work.
Time on inbound AUX call	The maximum time that an agent spends on an inbound call during auxiliary work.
Number of inbound AUX calls/agent	The total number of inbound calls that an agent can receive during auxiliary work. This exception can only be triggered once per interval.
Time on outbound AUX call (maximum)	The maximum time that an agent spends on an outbound call during auxiliary work.
Number of outbound AUX calls/agent	The total number of outbound calls that an agent can place during auxiliary work. This exception can only be triggered once per interval.
Time in AUX with Reason Code X (maximum)	The maximum time that agents can spend doing auxiliary work with Reason Code X (X is from 0 to 9).

Select <b>Active</b> to receive a notification of a login violation. A violation occurs when an agent attempts to log in with an ID that is not in the Dictionary or if an agent tries to log in with more than one ID at the same terminal. If you deactivate this exception, you are not notified if an agent logs in with an ID that is not in the Dictionary, but you still are notified if an agent tries to log in with more than one ID.		
The minimum time that an agent spends on an outbound ACD call.		
The maximum time that an agent spends on an outbound ACD call.		
The maximum number of calls that an agent can transfer.		
The maximum time that an agent can put an ACD call on hold. This time value is cumulative for each call. If an agent removes a call from hold and places it back on hold again, this value is not reset.		
The maximum number of ACD calls that an agent can put on hold. This exception can only be triggered once per interval.		
The maximum number of calls that are abandoned after being put on hold by an agent. This exception can only be triggered once per interval.		
The maximum time that a split/skill or direct agent ACD call can ring at agent's voice terminal before an exception is triggered.		
Select <b>Active</b> to be notified when an agent lets an ACD call ring at the voice terminal long enough for the switch to automatically redirect the call. You must have the <b>Redirection on No Answer</b> feature activated on the Communication Manager system to use this exception.		
The maximum number of seconds that an agent spends on a direct agent ACD call.		
The maximum number of direct agent ACD calls that an agent can have waiting in queue.		
The maximum time that any call waits in the direct agent queue.		
The maximum number of direct agent ACD calls that can leave the direct agent queue by abandoning before an exception is triggered. This exception can only be triggered once per interval.		

Number calls outflowed from direct agent queue (maximum)	The maximum number of direct agent calls that outflow from the direct agent queue. This exception can only be triggered once per interval.
Time on external outbound ACW call (maximum)	The maximum number of seconds that an agent spends on an external outbound call during after-call work.
Number of external outbound ACW calls/agent (maximum)	The maximum number of external outbound calls that an agent can make while in after-call work. This exception can only be triggered once per interval.
Time on external outbound AUX calls (maximum)	The maximum number of seconds an agent spends on an external outbound call during auxiliary work.
Number external outbound AUX calls/agent (maximum)	The maximum number of external outbound calls that an agent can make during auxiliary work. This exception can only be triggered once per interval.
Agent logged out with active/held calls	Select <b>Active</b> to be notified when an agent logs out with active or held calls on the voice terminal.
Logout attempt without valid reason code	The acceptable number of times that an agent can enter an invalid reason code when trying to log out. This exception can only be triggered once per interval.
AUX attempt without valid reason code	The acceptable number of times that an agent can enter an invalid AUX reason code. This exception can only be triggered once per interval.
Agent entered invalid call work codes	An exception that is pegged for CWC 0 (an agent types an unadministered call work code). This exception should be turned off if you are collecting call work codes in call records only.

### Agent exceptions report

Use the agent exceptions report to view exceptions that have occurred for the selected agents. For each agent exception, the report shows the time, agent, and type of exception.

### Before you begin

To be able to view data for an agent exception report, the following events must have occurred:

- One or more agent exceptions must have been activated.
- The exceptions must have occurred at some point. Otherwise, the report is blank.
- Active exceptions must be specified in the input window so that they are included in the report.

### Steps

To run the agent exceptions report:

1. From the Controller window, select **Commands** > **Exceptions**.

Supervisor displays the Exceptions window.

Exceptions			? ×
Operations	Reports		
Operations: Agent Exceptions Real-time Exception Log Split/Still Exceptions Trunk Group Exceptions VDN Exceptions Vector Exceptions			
ACD: Bison36vpe Script			▼ <u>H</u> elp
		OK.	Cancel

- 2. Select the **Reports** tab.
- 3. In the **ACD:** field, select the ACD that contains the agents on which to run the report.
- 4. In the **Reports:** list, highlight **Agent Exceptions by Location**.
- 5. Select OK.

Supervisor displays the Agent Exceptions window.

Agent Exceptions		_ 🗆 ×			
Inputs					
Date:	2/12/98				
Split/Skill:	s515 ,,+'AbCdEfGhlj				
Agents:	a44045 "+'AbCdEfGh				
Order by:	Time				
Exceptions:	Time Available       Image: State of the st				
Vie <u>w</u> Report on Sc	reen				
Print Report on:	ddops3	<b>e</b>			
	OK Cancel	Help			
		Bison36vpe			

- 6. In the **Date:** field, specify the date for the report in one of the following date formats:
  - Enter the date in MM/DD/YY format, for example, **10/06/01**.
  - Enter the relative date, for example, 0 for today, -1 for yesterday, or -7 for one week ago.
  - Enter a relative date range, for example, -9-0 causes the report to display data for the past ten days including today.
  - Select a date from the drop-down list.
  - Select a date by using the Browse button.

This is a required field.

7. In the **Split/Skill:** field, enter the name or number of the split/skill to display in the report.

This is a required field.

8. In the Agents: field, specify the name or number of the agents to display in the report.

This is a required field.

This field accepts the specification of multiple agents. Multiple values must be separated by a semicolon (;).

- 9. In the Order by: field, select one of the following sorting options:
  - Agent The report results are sorted by agent name or number.
  - Time The report results are sorted by the time that the exceptions occurred.
- 10. In the **Exceptions:** field, select one or more exceptions to include in the report.

Select only those exceptions that are or have been activated during the date specified. If you select exceptions that have not been active during the date specified, the report does not display any data in the report.

- 11. In the **Destination** group, select the output option of the report:
  - View Report on Screen The report is displayed on the screen.
  - **Print Report on:** Sends the report to the printer that is specified in the associated field. To change the specified printer, select the **Select printer** button located on the right side of this group.

Supervisor runs the report and sends it to the specified destination.

	Exceptions by Loca dit Format Tools 0						
	Date: 11/21/ Split/Skill: Conve	2000					
Time	Agent Name	Login ID	Agent Location ID	Exce	ption AU. Reas		Threshold
4:05PM	agent 6501	6501	0	Time Available		1	1
4:06PM	agent 6501	6501	0	Time Available		1	1
4:06PM	agent6504	6504	0	Time Available		1	1
4:06PM	agent 6502	6502	0	Time Available		1	1
4:06PM	agent 6503	6503	0	Time Available		1	1
4:07PM	agent 6503	6503	0	Time Available		1	1
4:07PM	agent 6501	6501	0	Time Available		1	1
_							
							test

# Split/skill exceptions

Using split/skill exceptions can help identify those splits/skills that need to be adjusted to achieve more efficiency in the contact center.

Split/skill exceptions can assist you in the identification of problems in the following areas:

- The length of time that calls wait for different handling options
- The number of calls that are directed through different handling options
- The average speed with which the calls are being answered

This section contains the following topics:

- Before you begin on page 325
- Permissions on page 325
- <u>Adding split/skill exceptions</u> on page 326
- Modifying split/skill exceptions on page 328
- <u>Deleting split/skill exceptions</u> on page 330
- <u>Split/skill exception definitions</u> on page 332
- <u>Split/skill exceptions report</u> on page 333

### Before you begin

The following items should be read and understood before working with split/skill exceptions:

- To administer exceptions for *skills*, your company must have purchased Expert Agent Selection (EAS). However, this feature is not needed to administer exceptions for *splits*.
- The split/skill exceptions configuration is not created by default in the CMS database when the split/skill is created. If a split/skill does not have an exceptions configuration, an Add action must be taken to create it.

### Permissions

Depending on the procedure that you want to perform, you need the following permissions:

 To view split/skill exceptions, the user ID used to log in to this Supervisor session requires read permission for the Exceptions subsystem and all affected splits/skills as well as the exceptions permission for all affected splits/skills. • To add, delete, or modify split/skill exceptions, the user ID used to log in to this *Supervisor* session requires *write* permission for the Exceptions subsystem and all affected splits/skills as well as the *exceptions* permission for all affected splits/skills

## Adding split/skill exceptions

This section provides the procedure for adding split/skill exception configurations.

#### Steps

To add a split/skill exception configuration:

1. From the Controller window, select **Commands** > **Exceptions**.

Exceptions				? ×
Operations	Reports	Ì		
Operations:	ŕ			
Agent Exceptions Real-time Exception	Log			- 1
Split/Skill Exceptions Trunk Group Excepti	ons			- 11
VDN Exceptions Vector Exceptions				- 11
Vector Exceptions				- 11
				- 11
ACD:				
Bison36vpe			<b>•</b>	
<u>S</u> cript			Help	
		OK	Cancel	

- 2. In the **ACD:** field, select the ACD that contains the split/skill to receive the new exception configuration.
- 3. In the **Operations:** list, highlight **Split/Skill Exceptions**.

Supervisor displays the Split/Skill Exception Administration window.

A c-buck		n Administratio			
Actions Edil		n Aunimistratio			اكا
		<b>S A</b>	1		
			J		
Split(s)/S	kill(s):		1	- 🖪	
	Time				
Active	Limit	Threshold	Exception Type		
C Active	0	0	Time call has waited in queue		
C Active		0	Number calls waiting		
C Active		0	Number calls abandoned		
C Active	0	0	Average speed of answer (seconds)		
C Active		0	Number intraflowed-out calls		
C Active		0	Number intraflowed-in calls		
C Active		0	Number interflowed-out calls		
C Active		0	Number calls handled as backup		
C Active		0	Number calls transferred		
C Active		0	Number calls offered while queue full		
C Active	0	0	Expected Wait Time (pri Top) exceeds th	reshold	
C Active	0	0	Expected Wait Time (pri High) exceeds t	hreshold	
C Active	0	0	Expected Wait Time (pri Medium) exceed	s threshold	•
				Bison36vpe	

- 5. In the **Split(s)/Skill(s):** field, enter the name or number of the split/skill for which an exceptions configuration is to be created.
- 6. For each **Exception Type** that should be monitored, the following fields must be configured:
  - Active Place a check mark in this check box to enable the exception allowing it to run and adhere to the parameters given in the other fields. Leaving this check box blank will disable the exception and *CMS* will not attempt to track the activity for this exception.
  - **Time Limit** Set the time limit in seconds (0-28800) for exception types that use a time limit. This value is used as the minimum or maximum amount of time for an activity. If this limit is surpassed, *CMS* will count this activity and compare it against the **Threshold** field. This field is requires an entry and cannot be left blank.
  - **Threshold** Enter the number of acceptable occurrences of this activity (0-999). Any occurrences beyond this number will generate an exception. If *CMS* should create an exception on the very first instance, enter **0** in this field. This field requires an entry and cannot be left blank.

7. When all necessary time limits and thresholds have been entered, select **Actions** > **Add** from the menu bar.

*Supervisor* saves the data for this split/skill and the status bar displays a **Successful** message.

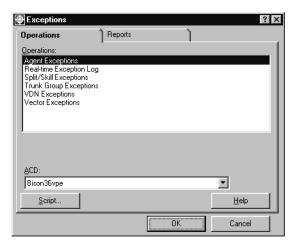
### Modifying split/skill exceptions

This section provides the procedure for modifying existing split/skill exception configurations.

#### Steps

To modify a split/skill exception configuration:

1. From the Controller window, select **Commands** > **Exceptions**.



- 2. In the **ACD:** field, select the ACD that contains the split/skill and its exception configuration.
- 3. In the **Operations:** list, highlight **Split/Skill Exceptions**.

Supervisor displays the Split/Skill Exception Administration window.

A salit/ski	Eventio	n Administratio		
Actions Edit	· · ·	TAdministratic		
		<b>N / A</b>	1	
C-10(-)/C			<u> </u>	
Split(s)/SI	kmfæl:			
	Time			
Active	Limit	Threshold	Exception Type	
C Active	0	0	Time call has waited in queue	
C Active		0	Number calls waiting	
C Active		0	Number calls abandoned	
C Active	0	0	Average speed of answer (seconds)	
C Active		0	Number intraflowed-out calls	
C Active		0	Number intraflowed-in calls	
C Active		0	Number interflowed-out calls	
C Active		0	Number calls handled as backup	
C Active		0	Number calls transferred	
C Active		0	Number calls offered while queue full	
C Active	0	0	Expected Wait Time (pri Top) exceeds th	reshold
-				
C Active	0	0	Expected Wait Time (pri High) exceeds t	nresnola
C Active	0	0	Expected Wait Time (pri Medium) exceed	s threshold 🚽
				Bison36vpe

- 5. In the **Split(s)/Skill(s):** field, enter the name or number of the split/skill for which its exceptions configuration is to be modified.
- 6. From the menu bar, select **Actions > Find one**.

*Supervisor* locates the exception configuration for the specified split/skill and the displays the data in the appropriate fields. If exception configuration data cannot be found, the status bar displays **0 matches found**.

To have all splits/skills returned in this step, leave the **Split(s)**:/**Skill(s)**: field blank before performing the **Find one** action. *Supervisor* will return all split(s)/skill(s) for which you have the *read* permission. You can then use the **Next** and **Previous** menu actions to cycle through the splits/skills.

- 7. Make the necessary changes in the following fields for each **Exception Type** that requires modification:
  - Active Place a check mark in this check box to enable the exception allowing it to run and adhere to the parameters given in the other fields. Leaving this check box blank will disable the exception and *CMS* will not attempt to track the activity for this exception.
  - **Time Limit** Set the time limit in seconds (0-28800) for exception types that use a time limit. This value is used as the minimum or maximum amount of time for an

activity. If this limit is surpassed, *CMS* will count this activity and compare it against the **Threshold** field. This field is requires an entry and cannot be left blank.

- **Threshold** Enter the number of acceptable occurrences of this activity (0-999). Any occurrences beyond this number will generate an exception. If *CMS* should create an exception on the very first instance, enter **0** in this field. This field requires an entry and cannot be left blank.
- 8. When all necessary time limits and thresholds have been entered, select **Actions** > **Modify** from the menu bar.

*Supervisor* saves the data for this split/skill and the status bar displays a **Successful** message.

## **Deleting split/skill exceptions**

This section provides the procedure for deleting existing split/skill exception configurations.

#### Steps

To delete a split/skill exception configuration:

1. From the Controller window, select **Commands** > **Exceptions**.

Exceptions				? ×
Operations	Reports	)		
Operations:	,			
Agent Exceptions Real-time Exception	Log			
Split/Skill Exception	s			
Trunk Group Excep VDN Exceptions	tions			
Vector Exceptions				
I				-1
ACD:				
Bison36vpe			<b>•</b>	
<u>S</u> cript			Help	
		OK	Cancel	Τ

- 2. In the **ACD:** field, select the ACD that contains the split/skill and its exception configuration.
- 3. In the **Operations:** list, highlight **Split/Skill Exceptions**.

Supervisor displays the Split/Skill Exception Administration window.

A					-
Actions Edil		n Administratio	on		×
3 172 S	s	<b>₩</b>   <b>1</b>	1		
<b>ur</b>   23	<u> </u>		<b>_</b>		
Split(s)/S	kill(s):		1	- 🖪	
	Time				
Active	Limit	Threshold	Exception Type		
C Active	0	0	Time call has waited in queue		
C Active		0	Number calls waiting		
C Active		0	Number calls abandoned		
C Active	0	0	Average speed of answer (seconds)		
C Active		0	Number intraflowed-out calls		
C Active		0	Number intraflowed-in calls		
C Active		0	Number interflowed-out calls		
C Active		0	Number calls handled as backup		
C Active		0	Number calls transferred		
C Active		0	Number calls offered while queue full		
C Active	0	0	Expected Wait Time (pri Top) exceeds th	reshold	
C Active	0	0	Expected Wait Time (pri High) exceeds t	hreshold	
C Active	0	0	Expected Wait Time (pri Medium) exceed	s threshold	-
		,		Bison36vpe	

- 5. In the **Split(s)/Skill(s):** field, enter the name or number of the split/skill for which the exception configuration is to be deleted.
- 6. From the menu bar, select **Actions > Find one**.

*Supervisor* locates the exception configuration for the specified split/skill and the displays the data in the appropriate fields. If exception configuration data cannot be found, the status bar displays **0 matches found**.

To have all splits/skills returned in this step, leave the **Split(s):/Skill(s):** field blank before performing the **Find one** action. *Supervisor* will return all split(s)/skill(s) for which you have the *read* permission. You can then use the **Next** and **Previous** menu actions to cycle through the splits/skills.

7. From the menu bar, select **Actions > Delete**.

*Supervisor* deletes the exception configuration for this split/skill from the *CMS* database and a displays a **Successful** message in the status bar.

# Split/skill exception definitions

The following table provides the definitions for the different split/skill exceptions:

In this field	Enter this value
Time call has waited in queue	The total acceptable amount of time any call in queue remains unanswered before an occurrence is counted against the threshold limit.
Number calls waiting	The maximum number of calls waiting in queue at any one time.
Number calls abandoned	The total number of acceptable abandoned calls. This exception can only be triggered once per interval.
Average speed of answer (seconds)	The maximum acceptable amount of time in seconds that a call waits in that split/skill queue before an agent answers. This exception can only be triggered once per interval.
Number intraflowed-out calls	The maximum acceptable number of calls that intraflow out from or in to a split or skill. This exception can only be triggered once per interval.
Number intraflowed-in calls	The acceptable number of calls that can intraflow in to the split or skill before an occurrence is counted against the threshold limit. This exception can only be triggered once per interval.
Number interflowed-out calls	The acceptable number of calls that can interflow out of the split or skill. This exception can only be triggered once per interval.
Number calls handled as backup	The acceptable number of calls that this split or skill can handle as a backup for another split or skill. This exception can only be triggered once per interval.
Number calls transferred	The acceptable number of calls that can be transferred from this split or skill. This exception can only be triggered once per interval.
Number calls offered while queue full	The acceptable number of calls that can be offered to the split or skill while the queue is full. This exception can only be triggered once per interval.
Expected Wait Time (pri Top) exceeds threshold	The maximum acceptable time in seconds that a call is expected to wait at <b>Top</b> priority before connecting to an agent. This exception can only be triggered once per interval.

Expected Wait Time (pri High) exceeds threshold	The maximum acceptable time in seconds that a call is expected to wait at <b>High</b> priority before connecting to an agent. This exception can only be triggered once per interval.
Expected Wait Time (pri Medium) exceeds threshold	The maximum acceptable time in seconds that a call is expected to wait at <b>Med</b> priority before connecting to an agent. This exception can only be triggered once per interval.
Expected Wait Time (pri Low)	The maximum acceptable time in seconds that a call is expected to wait at <b>Low</b> priority before connecting to an agent. This exception can only be triggered once per interval.
Rolling Average Speed of Answer	The maximum acceptable amount of time in seconds that is calculated for the rolling average speed of answer (ASA) for a split/skill. This exception can only be triggered once per interval. The ASA for the measured split/skill is sent to <i>CMS</i> by way of the ASA message. An occurrence is counted (in seconds) when <i>CMS</i> receives an ASA that exceeds the time limit that is specified for a split/skill. An exception is triggered when the threshold is exceeded.

## Split/skill exceptions report

The split/skill exceptions report is used to view exceptions that have occurred for the selected splits/skills. For each split/skill exception, the report shows the time and type of exception.

#### Before you begin

To be able to view data for a split/skill exception report, the following events must have occurred:

- One or more split/skill exceptions must have been activated.
- The exceptions must have occurred at some point. Otherwise, the report is blank.
- Active exceptions must be specified in the input window so that they are included in the report.
- The user ID used to run the report must have the *read* permission for the Exceptions subsystem and the affected splits/skills as well as the *exceptions* permission for all affected splits/skills.

#### Steps

To run the split/skill exceptions report:

1. From the Controller window, select **Commands** > **Exceptions**.

*Supervisor* displays the **Exceptions** window.

Exceptions 🖗			? ×
Operations	Reports		
Operations: Agent Exceptions Real-time Exception Split/Skill Exceptions Trunk Group Excepti VDN Exceptions Vector Exceptions	-		
ACD: Bison36vpe Script			⊻ <u>H</u> elp
		OK	Cancel

- 2. Select the **Reports** tab.
- 3. In the **ACD:** field, select the ACD that contains the split/skill on which to run the report.
- 4. In the **Reports:** list, highlight **Split/Skill Exceptions**.
- 5. Select OK.

Supervisor displays the Split/Skill Exceptions window.

A Split/Skill Exception	18	_ 🗆 X
- Inputs		
Date:	2/12/98	
Splits/Skills:		
Order by:	Time	
Exceptions:	Imme call has waited in queue     Number calls waiting     Number calls abandoned     Average speed of answer (seconds)     Number intraflowed-out calls     Number interflowed-out calls     Number interflowed-out calls     Number calls handled as backup	
Destination		
Vie <u>w</u> Report on Sc	reen	
C Print Report on:	ddops3	4
	OK Cancel	Help
		Bison36vpe

- 6. In the **Date:** field, specify the date for which you want to view the report. Entry of the date can be done through the following methods:
  - Enter MM/DD/YY format; for example, **10/06/01**.
  - Enter the relative day; for example, 0 for today, -1 for yesterday, or -7 for one week ago.
  - Enter a relative range; for example, -9-0 causes the report to display data for the past ten days including today.
  - Select a date from the drop-down list.
  - Select a date by using the Browse button.

This is a required field.

- 7. In the **Splits/Skills:** field, specify the name or number of one or more splits/skills to run the report against. Entry of the split/skill can be done through the following methods:
  - Enter the name or number of the split/skill.
  - Select the split/skill from the drop-down list.
  - Select the split/skill by using the Browse button.

Multiple splits/skills can be entered in this field, but must be separated by a semicolon (;). This is a required field.

- 8. In the Order by: field, select one of the following sorting options:
  - Split/Skill The report results are sorted by split/skill name or number.
  - Time The report results are sorted by the time the exceptions occurred.
- 9. In the **Exceptions:** field, select one or more exceptions to include in the report.

Only those exceptions that have been activated in the past should be selected. Selecting exceptions that have not been activated will not return any data in the report.

- 10. In **Destination** group, select one of the following output options:
  - View Report on Screen The report is displayed on the screen.
  - **Print Report on:** The report is sent to the specified printer. Any printer available to the PC can be used and selected through the button at the right of the field.

Supervisor sends the report to the specified output option.

		Exception	Time Occurri	
2:00PM	Purchasing	Rolling average speed of answer	1	1
2:00PM	Purchasing	Average speed of answer (seconds)	1	1
1:16PM	Purchasing	Rolling average speed of answer	1	1
1:30PM	Purchasing	Rolling average speed of answer	1	1
2:42PM	Purchasing	Rolling average speed of answer	1	1
3:05PM	Purchasing	Rolling average speed of answer	1	1
4:17PM	Purchasing	Rolling average speed of answer	1	1

# **Trunk group exceptions**

Trunk group exceptions are used to identify performance and capacity issues for the trunk groups in the contact center.

This section contains the following topics:

- Before you begin on page 337
- Permissions on page 337
- <u>Adding trunk group exceptions</u> on page 338
- Modifying trunk group exceptions on page 340
- Deleting trunk group exceptions on page 342
- Trunk group exception definitions on page 343
- Trunk group exceptions report on page 344

### Before you begin

The following items should be read and understood before working with trunk group exceptions:

• An Audio Difficulty exception is associated with each trunk group. This exception is always provided for all Communication Manager systems that support event counts and it cannot be disabled. For this reason, this exception is not available on the **Trunk Group Exception Administration** window.

### **Permissions**

Depending on the procedure that you want to perform, you need the following permissions:

- To view trunk group exceptions, the user ID used to log in to this *Supervisor* session requires *read* permission for the Exceptions subsystem and all affected trunk groups as well as the *exceptions* permission for all affected trunk groups.
- To add, delete, or change trunk group exceptions, the user ID used to log in to this *Supervisor* session requires *write* permission for the Exceptions subsystem and all affected trunk groups as well as the *exceptions* permission for all affected trunk groups.

## Adding trunk group exceptions

This section provides the procedure for adding an exception configuration for a trunk group.

#### Steps

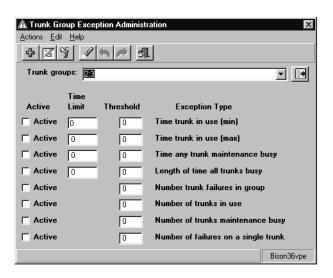
To add exceptions for a trunk group:

1. From the Controller Window, select **Commands** > **Exceptions**.

Exceptions		? ×
Operations	Reports	
Operations:		
Agent Exceptions Real-time Exception Log Split/Skill Exceptions Trunk Group Exceptions VDN Exceptions		
Vector Exceptions		
ACD:		
Bison36vpe		<b>T</b>
<u>S</u> cript		Help
	OK	Cancel

- 2. In the **ACD**: field, select the ACD for the trunk group that will receive the new exceptions configuration.
- 3. In the **Operations:** list, highlight **Trunk Group Exceptions**.

Supervisor displays the Trunk Group Exception Administration window.



- 5. In the **Trunk groups:** field, enter the name or number of the trunk group for which an exceptions configuration is to be created.
- For each Exception Type that should be monitored, the following fields must be configured:
  - Active Place a check mark in this check box to enable the exception allowing it to run and adhere to the parameters given in the other fields. Leaving this check box blank will disable the exception and *CMS* will not attempt to track the activity for this exception.
  - **Time Limit** Set the time limit in seconds (0-28800) for exception types that use a time limit. This value is used as the minimum or maximum amount of time for an activity. If this limit is surpassed, *CMS* will count this activity and compare it against the **Threshold** field. This field is requires an entry and cannot be left blank.
  - **Threshold** Enter the number of acceptable occurrences of this activity (0-999). Any occurrences beyond this number will generate an exception. If *CMS* should create an exception on the very first instance, enter **0** in this field. This field requires an entry and cannot be left blank.
- When all necessary time limits and thresholds have been entered, select Actions > Add from the menu bar.

*Supervisor* saves the data for this trunk group and the status bar displays a **Successful** message.

## Modifying trunk group exceptions

This section provides the procedure for modifying an existing exception configuration for a trunk group.

#### Steps

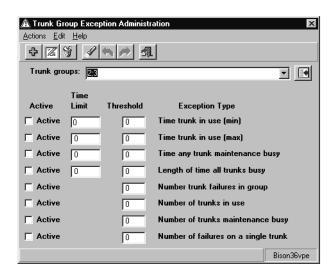
To modify trunk group exceptions:

1. From the Controller window, select **Commands** > **Exceptions**.

Exceptions				1	? >
Operations	Reports		)		
Operations:	·				
Agent Exceptions Real-time Exception Log Split/Skil Exceptions Trunk Group Exceptions VDN Exceptions Vector Exceptions					
ACD: Bison36vpe				-	
<u>S</u> cript				<u>H</u> elp	
		OK		Cancel	

- 2. In the **ACD:** field, select the ACD that contains the trunk group and its exception configuration.
- 3. In the **Operations:** list, highlight **Trunk Group Exceptions**.

Supervisor displays the Trunk Group Exception Administration window.



- 5. In the **Trunk groups:** field, enter the name or number of the trunk group for which exception configuration is to be modified.
- 6. From the menu bar, select **Actions > Find one**.

*Supervisor* locates the exception configuration data for the specified trunk group and displays it in the appropriate fields. If data cannot be found for this trunk group, the status bar displays **0 matches found**.

To return all trunk groups, leave the **Trunk groups:** field blank before performing the **Find one** action. *Supervisor* will return all trunk groups for which you have the *read* permission. You can then use the **Next** and **Previous** menu actions to cycle through the trunk groups.

- 7. For each **Exception Type** that should be monitored, the following fields must be configured:
  - Active Place a check mark in this check box to enable the exception allowing it to run and adhere to the parameters given in the other fields. Leaving this check box blank will disable the exception and *CMS* will not attempt to track the activity for this exception.
  - **Time Limit** Set the time limit in seconds (0-28800) for exception types that use a time limit. This value is used as the minimum or maximum amount of time for an activity. If this limit is surpassed, *CMS* will count this activity and compare it against the **Threshold** field. This field is requires an entry and cannot be left blank.
  - **Threshold** Enter the number of acceptable occurrences of this activity (0-999). Any occurrences beyond this number will generate an exception. If *CMS* should create an exception on the very first instance, enter **0** in this field. This field requires an entry and cannot be left blank.

8. When all necessary time limits and thresholds have been entered, select **Actions** > **Modify** from the menu bar.

*Supervisor* updates the data for this trunk group and the status bar displays a **Successful** message.

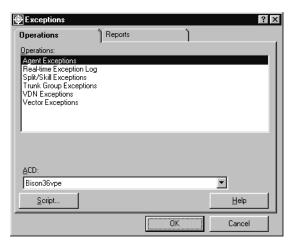
### **Deleting trunk group exceptions**

This section provides the procedure for deleting existing trunk group exception configurations.

#### Steps

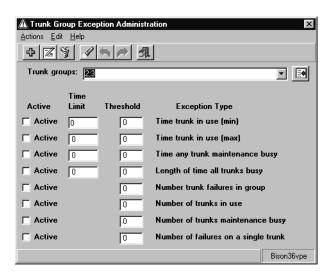
To delete a trunk group exception configuration:

1. From the Controller window, select **Commands** > **Exceptions**.



- 2. In the **ACD:** field, select the ACD that contains the trunk group and its exception configuration.
- 3. In the **Operations:** list, highlight **Trunk Group Exceptions**.

Supervisor displays the Trunk Group Exception Administration window.



- 5. In the **Trunk groups:** field, enter the name or number of the trunk group for which the exception configuration is to be deleted.
- 6. From the menu bar, select Actions > Find one.

The exception configuration is found for the specified trunk group and the data displays in the appropriate fields. If exception configuration data cannot be found, the status bar will display **0 matches found**.

To return all trunk groups, leave the **Trunk groups:** field blank before performing the **Find one** action. *Supervisor* will return all trunk groups for which you have the *read* permission. You can then use the **Next** and **Previous** menu actions to cycle through the trunk groups.

7. From the menu bar, select **Actions > Delete**.

The exception configuration for this trunk group is deleted from the *CMS* database and a **Successful** message displays in the status bar.

### Trunk group exception definitions

The following table provides the definitions for the different trunk group exceptions:

In this field	Enter this value
Time trunk in use (minimum)	The minimum acceptable time in seconds that a trunk in the trunk group can be in use. This exception can only be triggered once per interval for the same trunk.

Time trunk in use (maximum)	The maximum acceptable time in seconds that a trunk in the trunk group can be in use. This exception can only be triggered once per interval for the same trunk.
Time any trunk maintenance busy	The maximum acceptable time in seconds that a trunk in the trunk group can be in the maintenance busy state.
Length of time all trunks busy	The maximum acceptable time that all trunks in the trunk group can be busy at once. This exception can only be triggered once per interval.
Number of trunks in use	The maximum acceptable number of trunks that can be in use at the same time in the trunk group. An exception is reached each time the allowed number of trunks in use exceeds the threshold within the interval.
Number of trunks maintenance busy	The maximum acceptable number of trunks that can be in the maintenance busy state in the trunk group. An exception is reached each time the allowed number of trunk that are in the maintenance busy state exceeds the threshold within the interval.

## Trunk group exceptions report

Use the trunk group exceptions report to view exceptions that have occurred for the selected trunk groups. For each trunk group exception, the report shows the time and type of exception.

#### Before you begin

To be able to view data for a trunk group exception report, the following events must have occurred:

- One or more trunk group exceptions must have been activated.
- The exceptions must have occurred at some point. Otherwise, the report is blank.
- Active exceptions must be specified in the input window so that they are included in the report.

#### Steps

To run the trunk group exceptions report:

1. From the Controller window, select **Commands** > **Exceptions**.

Supervisor displays the Exceptions window.

Exceptions			?	)
Operations	Reports			
Operations:	ſ			
Agent Exceptions Real-time Exception Log				
Split/Skill Exceptions				
Trunk Group Exceptions VDN Exceptions				
Vector Exceptions				
,				
ACD:				
Bison36vpe			•	
<u>S</u> cript			<u>H</u> elp	
		OK	Cancel	ī
			Cancel	

- 2. Select the **Reports** tab.
- 3. In the **ACD:** field, select the ACD that contains the trunk group on which to run the report.
- 4. In the **Reports:** list, highlight **Trunk Group Exceptions by Location**.
- 5. Select OK.

Supervisor displays the Trunk Group Exceptions window.

A Trunk Group Excep	tions	_ 🗆 X
Date:	2/12/98	
Trunk Groups:	2,3 💽 💽	
Order by:	Time	
Exceptions:	Time trunk in use (min) Time trunk in use (max) Total time trunks maintenance busy Length of time all trunks busy Number trunk failures in group Number trunks in use Number trunks maintenance busy Number failures on any single trunk	
Destination		
Vie <u>w</u> Report on So	reen	
C Print Report on:	ddops3	4
	OK Cancel	<u>H</u> elp
		Bison36vpe

- 6. In the **Date:** field, specify the date to view for the report. Entry of the date can be done through the following methods:
  - Enter MM/DD/YY format; for example, **10/06/01**.
  - Enter the relative day; for example, 0 for today, -1 for yesterday, or -7 for one week ago.
  - Enter a relative range; for example, -9-0 causes the report to display data for the past ten days including today.
  - Select a date from the drop-down list.
  - Select a date by using the Browse button.

This is a required field.

- 7. In the Trunk Groups: field, specify the name or number of one or more trunk groups to run the report against. Entry of the trunk group can be done through the following methods:
  - Enter the name or number of the trunk group.
  - Select the trunk group from the drop-down list.
  - Select the trunk group by using the Browse button.

Multiple trunk groups can be entered in this field, but must be separated by a semicolon (;).

This is a required field.

- 8. In the Order by: field, select one of the following sorting options:
  - Trunk Group The report results are sorted by trunk group number.
  - Trunk Location The report results are sorted by individual trunks.
  - Time The report results are sorted by the time the exceptions occurred.
- 9. In the **Exceptions:** field, select one or more exceptions to include in the report.

Select only those exceptions that are or have been activated during the date specified. If you select exceptions that have not been active during the date specified, the report does not display any data in the report.

**Audio difficulty** is a trunk group exception that can be requested on a report even though it cannot be administered in trunk group exception operations.

10. In **Destination** group, select one of the following output options:

- View Report on Screen The report is displayed on the screen.
- **Print Report on:** The report is sent to the specified printer. Any printer available to the PC can be used and selected through the button at the right of the field.

Supervisor sends the report to the specified output option.

	k Group Exceptions				_ 🗆 ×
<u>H</u> eport	Edit Format Tools Options Date: 2/12/98	<u>H</u> elp			
	Date. 2/12/90			-	
Time	Trunk Group Name	Exception	Time Threshold Trunk Limit	Agent Name	Login ID
				Biso	n36vpe //

# **VDN** exceptions

Use Vector Directory Number (VDN) exceptions to assist in the identification of problems in the following areas:

- The amount of time calls that remain in the vector or at an agent
- The number of calls that reach specific states, such as disconnected, busy, and abandoned
- The number of calls that are routed in or out of the VDN and if they are successful

This section contains the following topics:

- Before you begin on page 348
- Permissions on page 349
- Adding VDN exceptions on page 349
- Modifying VDN exceptions on page 351
- <u>Deleting VDN exceptions</u> on page 353
- <u>VDN exception definitions</u> on page 355
- <u>VDN exceptions report</u> on page 356

### Before you begin

The following items should be read and understood before working with VDN exceptions:

- To administer VDN exceptions, your company must have purchased and installed the Call Vectoring feature.
- Because of the routing that is permitted by the go to vector command, the Time in vector exception may include the time that a call spends in more than one vector.
- CMS begins to monitor for VDN exceptions when a call connects to the VDN and stops when the call is disconnected, sent to another VDN, sent to an external destination, or transferred. The call remains connected to the VDN if one of the following circumstances is encountered:
  - The call routes to another vector through a go to vector step.
  - The call is sent through a **route to** or **adjunct routing** step to a non-VDN extension that is internal to the local Communication Manager system.
- If a large number of VDNs exist in the Dictionary (over 2000), there can be lengthy waiting periods when you browse for VDNs through *Supervisor*.

• Some exception types require that an appropriate step exists in the vector to which the VDN is assigned. For example, to get exceptions on unsuccessful Look Ahead Interflow attempts, the vector for the VDN must have at least one route to step that routes calls to a vector on a remote switch.

## Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view VDN exceptions, the user ID used to log in to this *Supervisor* session requires *read* permission for the Exceptions subsystem and all affected VDNs as well as the *exceptions* permission for all affected VDNs.
- To add, delete, or change VDN exceptions, the user ID used to log in to this *Supervisor* session requires *write* permission for the Exceptions subsystem and all affected VDNs as well as the *exceptions* permissions for all affected VDNs.

## Adding VDN exceptions

This section provides the procedure for adding an exceptions configuration to a VDN.

#### Steps

To add an exceptions configuration to a VDN:

1. From the Controller window, select **Commands** > **Exceptions**.

Supervisor displays the Exceptions window.

Exceptions Operations	Reports	ì	
Operations:	1		
Agent Exceptions			
Real-time Exception Log Split/Skill Exceptions			
Trunk Group Exceptions			
VDN Exceptions Vector Exceptions			
V COLOR E ACOPTIONS			
			, ,
ACD:			
ACD:			
Bison36vpe			
<u>S</u> cript			<u>H</u> elp
		2	 1
		OK	Cancel

2. In the **ACD:** field, select the ACD that contains the VDN that will receive the new exceptions configuration.

- 3. In the Operations: list, highlight VDN Exceptions.
- 4. Select OK.

Supervisor displays the VDN Exception Administration window.

A VDN Exc	eption Ad	ministration		_ 🗆	х
<u>Actions</u> <u>E</u> dil	: <u>H</u> elp				
<b>₽</b> 🖉 '	¥ 🖌	<b>N / </b> 1			
VDNs:					Ê
Active	Time Limit	Threshold	Exception Type		
C Active	0	0	Time in vector (max)		
C Active	0	0	Time at agent (min)		
C Active	0	0	Time at agent (max)		
C Active		0	Number calls abandoned while in vec	tor	
C Active		0	Number calls forced busy		
C Active		0	Number calls disconnected		
C Active		0	Number calls in an ACD split queue		
C Active		0	Number calls that flowed into VDN		
C Active		0	Number calls that flowed out of VDN		
C Active		0	Number calls interflowed out of VDN		
C Active		0	Number calls handled by backup split	t	
C Active		0	Number unsuccessful lookahead inte	rflow attempts	
C Active		0	Number unsuccessful adjunct routing	attempts	Γ
C Active	0	0	Rolling Average Speed of Answer (se	conds)	-
				Bison36vpe	

- 5. In the **VDNs:** field, enter the name or number of the VDN for which the exceptions configuration is to be created.
- 6. For each **Exception Type** that should be monitored, the following fields must be configured:
  - Active Place a check mark in this check box to enable the exception allowing it to run and adhere to the parameters given in the other fields. Leaving this check box blank will disable the exception and *CMS* will not attempt to track the activity for this exception.
  - **Time Limit** Set the time limit in seconds (0-28800) for exception types that use a time limit. This value is used as the minimum or maximum amount of time for an activity. If this limit is surpassed, CMS will count this activity and compare it against the **Threshold** field. This field is requires an entry and cannot be left blank.
  - **Threshold** Enter the number of acceptable occurrences of this activity (0-999). Any occurrences beyond this number will generate an exception. If *CMS* should create an exception on the very first instance, enter **0** in this field. This field requires an entry and cannot be left blank.

7. When all necessary time limits and thresholds have been entered, select **Actions** > **Add** from the menu bar.

*Supervisor* saves the data for this VDN exception configuration and the status bar displays a **Successful** message.

### **Modifying VDN exceptions**

This section provides the procedure for modifying an existing exception configuration for a VDN.

#### Steps

To modify VDN exceptions:

1. From the Controller window, select **Commands** > **Exceptions**.

)perations	Reports	1	
<u>)</u> perations:	ŗ		
Agent Exceptions Real-time Exception I	_00		
Split/Skill Exceptions Trunk Group Excepti	-		
VDN Exceptions	JIIS		
Vector Exceptions			
ACD:			
Bison36vpe		1	-
·			<u>H</u> elp
Script			

- 2. In the **ACD:** field, select the ACD that contains the VDN and its exception configuration.
- 3. In the **Operations:** list, highlight **VDN Exceptions**.

Supervisor displays the VDN Exception Administration window.

		ministration		_ 🗆	×
<u>Actions</u> <u>E</u> dil	: <u>H</u> elp				
<b>₽</b> 🔏 '	¥ 🖌	<b>N / </b> 1			
VDNs:					h
	Time				
Active	Limit	Threshold	Exception Type		
C Active	0	0	Time in vector (max)		
C Active	0	0	Time at agent (min)		
C Active	0	0	Time at agent (max)		
C Active		0	Number calls abandoned while in vec	tor	
C Active		0	Number calls forced busy		
C Active		0	Number calls disconnected		
C Active		0	Number calls in an ACD split queue		
C Active		0	Number calls that flowed into VDN		
C Active		0	Number calls that flowed out of VDN		
C Active		0	Number calls interflowed out of VDN		
C Active		0	Number calls handled by backup split	t	
C Active		0	Number unsuccessful lookahead inte	rflow attempts	
C Active		0	Number unsuccessful adjunct routing	attempts	
C Active	0	0	Rolling Average Speed of Answer (se	conds)	•
				Bison36vpe	

- 5. In the **VDNs:** field, enter the name or number of the VDN for which exception configuration is to be modified.
- 6. From the menu bar, select **Actions > Find one**.

*Supervisor* locates the exception configuration data for the specified VDN and displays it in the appropriate fields. If exception configuration data cannot be found for this VDN, the status bar displays **0 matches found**.

To have all VDNs returned in this step, leave the **VDNs**: field blank before performing the **Find one** action. *Supervisor* will return all VDNs for which you have the *read* permission. You can then use the **Next** and **Previous** menu actions to cycle through the VDNs.

- 7. For each **Exception Type** that should be monitored, the following fields must be configured:
  - Active Place a check mark in this check box to enable the exception allowing it to run and adhere to the parameters given in the other fields. Leaving this check box blank will disable the exception and *CMS* will not attempt to track the activity for this exception.
  - **Time Limit** Set the time limit in seconds (0-28800) for exception types that use a time limit. This value is used as the minimum or maximum amount of time for an

activity. If this limit is surpassed, CMS will count this activity and compare it against the **Threshold** field. This field is requires an entry and cannot be left blank.

- **Threshold** Enter the number of acceptable occurrences of this activity (0-999). Any occurrences beyond this number will generate an exception. If CMS should create an exception on the very first instance, enter **0** in this field. This field requires an entry and cannot be left blank.
- When all necessary time limits and thresholds have been entered, select Actions > Modify from the menu bar.

*Supervisor* updates the exception configuration data for this VDN and the status bar displays a **Successful** message.

## **Deleting VDN exceptions**

This section provides the procedure for deleting existing VDN exception configurations.

#### Steps

To delete a VDN exception configuration:

1. From the Controller window, select **Commands > Exceptions**.

Exceptions					? ×
Operations	Reports		)		
Operations:					
Agent Exceptions Real-time Exception Log Split/Skill Exceptions Trunk Group Exceptions					
VDN Exceptions Vector Exceptions	24 2				
I					
ACD:					
Bison36vpe				•	
<u>S</u> cript				<u>H</u> elp	
		OK		Cancel	

- 2. In the **ACD:** field, select the ACD that contains the VDN and its exception configuration.
- 3. In the **Operations:** list, highlight **VDN Exceptions**.

Supervisor displays the VDN Exception Administration window.

<u> </u>		ministration		_ 🗆	X
Actions Edit	: <u>H</u> elp velladi		1		
	3 1				
VDNs:					Ĥ
	Time				
Active	Limit	Threshold	Exception Type		
C Active	0	0	Time in vector (max)		
C Active	0	0	Time at agent (min)		
C Active	0	0	Time at agent (max)		
C Active		0	Number calls abandoned while in vec	tor	
C Active		0	Number calls forced busy		
C Active		0	Number calls disconnected		
C Active		0	Number calls in an ACD split queue		
C Active		0	Number calls that flowed into VDN		
C Active		0	Number calls that flowed out of VDN		
C Active		0	Number calls interflowed out of VDN		
C Active		0	Number calls handled by backup spli	t	
C Active		0	Number unsuccessful lookahead inte	rflow attempts	
C Active		0	Number unsuccessful adjunct routing	attempts	
C Active	0	0	Rolling Average Speed of Answer (se	conds)	•
				Bison36vpe	

- 5. In the **VDNs:** field, enter the name or number of the VDN for which the exception configuration is to be deleted.
- 6. From the menu bar, select **Actions** > **Find one**.

*Supervisor* locates the exception configuration for the specified VDN and the data displays in the appropriate fields. If exception configuration data cannot be found, the status bar displays **0 matches found**.

To have all VDNs returned through this step, leave the **VDNs:** field blank. *Supervisor* displays the total number of matches in the status bar. The VDNs can then be navigated by using the **Next** and **Previous** actions.

7. From the menu bar, select **Actions > Delete**.

*Supervisor* deletes the exception configuration for this VDN from the *CMS* database and displays a **Successful** message in the status bar.

# VDN exception definitions

The following table provides the definitions for the different VDN exceptions:
--

In this field	Enter this value
Time in Vector	The maximum acceptable time in seconds that a call should spend in vector processing. This exception can only be triggered once per interval.
Time at agent (minimum)	The minimum acceptable time in seconds that a call to this VDN is connected to an agent. This exception can only be triggered once per interval.
Time at agent (maximum)	The maximum acceptable time in seconds that a call to this VDN is connected to an agent. This exception can only be triggered once per interval.
Number of calls abandoned while in vector	The maximum acceptable number of calls to this VDN that are abandoned before being answered during an interval. This exception can only be triggered once per interval.
Number of calls forced busy	The maximum acceptable number of calls to this VDN that receive a busy signal from the switch during an interval. This exception can only be triggered once per interval.
Number of calls disconnected	The maximum acceptable number of calls that are disconnected during vector processing during an interval. Disconnects can be caused by the <b>disconnect</b> vector command, by the vector disconnect timer, or because a call reached the end of vector processing without being queued. Calls that are disconnected after receiving a busy signal from the <b>busy</b> command are not included. This exception can only be triggered once per interval.
Number of calls in an ACD split/skill queue	The maximum acceptable number of call to this VDN that are in a split/skill queue.
Number of calls that flowed into VDN	The maximum number of calls during an interval that enter this VDN by a <b>route-to</b> or <b>adjunct routing link</b> vector step, or a transfer from a local extension. This exception can only be triggered once per interval.
Number of calls that flowed out of VDN	The maximum acceptable number of calls that are routed from this VDN during an interval to another VDN or external destination. This exception can only be triggered once per interval.
Number of calls that interflowed out of VDN	The maximum acceptable number of calls that are routed from this VDN to an external destination during an interval. This exception can only be triggered once per interval.

In this field	Enter this value
Number of calls handled by backup split or skill	The maximum acceptable number of calls to this VDN that are connected to a backup split/skill during an interval. A check backup split, check backup skill, messaging split, or messaging skill vector command causes a call to be handled by a backup split/ skill. This exception cannot trigger more than once per interval.
Number of unsuccessful look ahead interflow attempts	The maximum acceptable number of calls to this VDN that fail to interflow to another Communication Manager system during an interval. The <b>route-to vector</b> command causes a call to interflow. This exception can only be triggered once per interval.
Number of unsuccessful adjunct routing attempts	The maximum acceptable number of failures of a call to this VDN to connect to an adjunct host computer during an interval. The failure of an <b>adjunct route link</b> vector command causes an unsuccessful adjunct routing attempt. The failure can occur because the connection to the adjunct is out of service or busy, or because the adjunct software rejects control. This exception can only be triggered once per interval.
Rolling Average Speed of Answer	The acceptable amount of time, in seconds, that is calculated for the rolling average speed of answer for a VDN. This exception can only be triggered once per interval.

## **VDN** exceptions report

Use the VDN exceptions report to view exceptions that have occurred for the selected VDN. For each VDN exception, the report shows the time and type of exception.

#### Before you begin

To be able to view data for a VDN exception report, the following events must have occurred:

- One or more VDN exceptions must have been activated.
- The exceptions must have occurred at some point. Otherwise, the report is blank.
- Active exceptions must be specified in the input window so that they are included in the report.

#### Steps

To run the VDN exceptions report:

1. From the Controller window, select **Commands** > **Exceptions**.

Supervisor displays the Exceptions window.

Exceptions				?	>
Operations	Reports		]		
Operations:					
Agent Exceptions					
Real-time Exception Log Split/Skill Exceptions					
Trunk Group Exceptions					
VDN Exceptions Vector Exceptions					
V SCIOI EXCEPTIONS					
ACD:					
Bison36vpe				•	
<u>S</u> cript				<u>H</u> elp	
		ОК		Cancel	

- 2. Select the **Reports** tab.
- 3. In the ACD: field, select the ACD that contains the VDN on which to run the report.
- 4. In the **Reports:** list, highlight **VDN Exceptions by Location**.
- 5. Select OK.

A VDN Exceptions		_ 🗆 X
Inputs		
Date:	2/12/98	
VDNs:		
Order by:	Time	
Exceptions:	Time in vector (max) Time at agent (min) Time at agent (max) Number calls abandoned while in vector Number calls forced busy Number calls disconnected Number calls in ACD split queue Number calls flowed into VDN	
Destination		
<ul> <li>View Report on Sc</li> <li>Print Report on:</li> </ul>	leen	
C Enni Nepoli on.	ddops3	<u></u>
	OK Cancel	<u>H</u> elp
		Bison36vpe

- 6. In the **Date:** field, specify the date to view for the report. Entry of the date can be done through the following methods:
  - Enter MM/DD/YY format; for example, **10/06/01**.
  - Enter the relative day; for example, 0 for today, -1 for yesterday, or -7 for one week ago.
  - Enter a relative range; for example, -9-0 causes the report to display data for the past ten days including today.
  - Select a date from the drop-down list.
  - Select a date by using the Browse button.

This is a required field.

- 7. In the **VDNs:** field, specify the name or number of one or more VDNs to run the report against. Entry of the VDN can be done through the following methods:
  - Enter the name or number of the VDN.
  - Select the VDN from the drop-down list.
  - Select the VDN by using the Browse button.

Multiple VDNs can be entered in this field, but must be separated by a semicolon (;). This is a required field.

- 8. In the Order by: field, select one of the following sorting options:
  - **Time** The report results are sorted by the time the exceptions occurred.
  - VDN The report results are sorted by VDN name or number.
  - Vector The report results are sorted by vector.
- 9. In the **Exceptions:** field, select one or more exceptions to include in the report.

Select only those exceptions that have been activated at some point in the past. Selecting exceptions that have not been activated will not return any data in the report.

- 10. In **Destination** group, select one of the following output options:
  - View Report on Screen The report is displayed on the screen.
  - **Print Report on:** The report is sent to the specified printer. Any printer available to the PC can be used and selected through the button at the right of the field.

Supervisor sends the report to the specified output option.

Date: 11/21/2000					
		-			<b>I</b>
Time	VDN Name	Vector Name	Exception	Time Occurred	Threshold
12:00AM	Collections	All Night	Time at agent (max)	1	1
12:00AM	Collections	All Night	Time in vector (max)	1	1
12:30AM	Collections	All Night	Time at agent (max)	1	1
12:32AM	Collections	All Night	Time in vector (max)	1	1
1:00AM	Collections	All Night	Time at agent (max)	1	1
1:30AM	Collections	All Night	Time at agent (max)	1	1
1:32AM	Collections	All Night	Time in vector (max)	1	1
2:00AM	Collections	All Night	Time at agent (max)	1	1
2:06AM	Collections	All Night	Time in vector (max)	1	1
2:30AM	Collections	All Night	Time at agent (max)	1	1
2:53AM	Collections	All Night	Time in vector (max)	1	1
3:00AM	Collections	All Night	Time at agent (max)	1	1
3:00AM	Collections	All Night	Time in vector (max)	1	1
3:30AM	Collections	All Night	Time at agent (max)	1	1
3:30AM	Collections	All Night	Time in vector (max)	1	1
4:00AM	Collections	All Night	Time at agent (max)	1	1
4:19AM	Collections	All Night	Time in vector (max)	1	1
4:30AM	Collections	All Night	Time at agent (max)	1	1
4:33AM	Collections	All Night	Time in vector (max)	1	1

# **Vector exceptions**

When vector exceptions are configured and activated, *CMS* monitors for these exceptions when a call enters the vector and continues monitoring until the call connects to an agent, is abandoned, or is routed to another destination.

Vector exceptions can assist in the identification of problems in the following areas:

- The amount of time that a call waits in a vector
- The number of calls that are abandoned, disconnected, or forced busy while in the vector
- Numerous unsuccessful routing attempts

This section contains the following topics:

- Before you begin on page 360
- Permissions on page 361
- Adding vector exceptions on page 361
- Modifying vector exceptions on page 363
- Deleting vector exceptions on page 365
- Vector exception definitions on page 366
- Vector exceptions report on page 367

### Before you begin

The following items should be read and understood before working with vector exceptions:

- Calls may generate some exceptions for a vector, even after the vector has given routing control to the adjunct by an **adjunct routing** vector command.
- Some exception types require that an appropriate step exists in the vector. For example, to get exceptions on unsuccessful Look Ahead Interflow attempts, the vector must have at least one **route to** step which routes calls to a remote Communication Manager system.

### Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view vector exceptions, the user ID used to log in to this *Supervisor* session requires *read* permission for the Exceptions subsystem and all affected vectors as well as the *exceptions* permission for the affected vectors.
- To add, delete, or change vector exceptions, the user ID used to log in to this *Supervisor* session requires *write* permission for the Exceptions subsystem and all affected vectors as well as the *exceptions* permission for the affected vectors.

# Adding vector exceptions

This section provides the procedure for adding an exceptions configuration for a vector.

### Steps

To add a vector exception configuration:

1. From the Controller window, select **Commands** > **Exceptions**.

Supervisor displays the Exceptions window.

Exceptions				? 2
Operations	Reports		Ì	
Operations:	·			
Agent Exceptions Real-time Exception Log Split/Skill Exceptions Trunk Group Exceptions				
VDN Exceptions Vector Exceptions				
100				
ACD:				
Bison36vpe				
<u>S</u> cript				Help
		OK		Cancel

- 2. In the **ACD:** field, select the ACD that contains the vector that will receive the new exceptions configuration.
- 3. In the **Operations:** list, highlight **Vector Exceptions**.

#### 4. Select OK.

Supervisor displays the Vector Exception Administration window.

Actions     Edit     Help       B     B     Actions     Edit					
Vectors:	ļ				
	Time				
Active	Limit	Threshold	Exception Type		
C Active	0	0	Time in vector (max)		
C Active		0	Number calls abandoned while in vec	tor	
C Active		0	Number calls forced busy		
C Active		0	Number calls disconnected		
C Active		0	Number calls in an ACD split queue		
C Active		0	Number unsuccessful lookahead inter	flow attempts	
C Active		0	Number unsuccessful adjunct routing	attempts	
				Bison36vpe	

- 5. In the **Vectors:** field, enter the name or number of the vector for which an exceptions configuration is to be created.
- 6. For each **Exception Type** that should be monitored, the following fields must be configured:
  - Active Place a check mark in this check box to enable the exception allowing it to run and adhere to the parameters given in the other fields. Leaving this check box blank will disable the exception and *CMS* will not attempt to track the activity for this exception.
  - **Time Limit** Set the time limit in seconds (0-28800) for exception types that use a time limit. This value is used as the minimum or maximum amount of time for an activity. If this limit is surpassed, *CMS* will count this activity and compare it against the **Threshold** field. This field is requires an entry and cannot be left blank.
  - **Threshold** Enter the number of acceptable occurrences of this activity (0-999). Any occurrences beyond this number will generate an exception. If *CMS* should create an exception on the very first instance, enter **0** in this field. This field requires an entry and cannot be left blank.
- 7. When all necessary time limits and thresholds have been entered, select **Actions** > **Add** from the menu bar.

*Supervisor* saves the data for this vector exception configuration and the displays a **Successful** message in the status bar.

# Modifying vector exceptions

This section provides the procedure for modifying an existing exception configuration for a vector.

### Steps

To modify vector exceptions:

1. From the Controller window, select **Commands** > **Exceptions**.

Supervisor displays the Exceptions window.

Exceptions			? ×
Operations	Reports	Ì	
Operations: Agent Exceptions Real-time Exception Split/Skill Exceptions Trunk Group Except VDN Exceptions Vector Exceptions	-		
ACD: Bison36vpe Script			▼ <u>H</u> elp
		OK.	Cancel

- 2. In the **ACD:** field, select the ACD that contains the vector and its exception configuration.
- 3. In the **Operations:** list, highlight **Vector Exceptions**.

#### 4. Select OK.

Supervisor displays the Vector Exception Administration window.

A Vector Exception Administration       X         Actions       Edit         Help       Image: Second				
Vectors:				
Active	Time Limit	Threshold	Exception Type	
C Active	0	0	Time in vector (max)	
C Active		0	Number calls abandoned while in vec	tor
C Active		0	Number calls forced busy	
C Active		0	Number calls disconnected	
C Active		0	Number calls in an ACD split queue	
C Active		0	Number unsuccessful lookahead inter	flow attempts
C Active		0	Number unsuccessful adjunct routing	attempts
				Bison36vpe

- 5. In the **Vectors:** field, enter the name or number of the vector for which the exception configuration is to be modified.
- 6. From the menu bar, select **Actions** > **Find one**.

*Supervisor* locates the agent exception configuration for the specified split/skill and displays the data in the appropriate fields. If the exception configuration data cannot be found, the status bar displays **0 matches found**.

To have all vectors returned when performing this step, leave the **Vectors:** field blank before performing the **Find one** action. *Supervisor* will return all vectors for which you have the *read* permission. You can then use the **Next** and **Previous** menu actions to cycle through the vectors.

- 7. For each **Exception Type** that should be monitored, the following fields must be configured:
  - Active Place a check mark in this check box to enable the exception allowing it to run and adhere to the parameters given in the other fields. Leaving this check box blank will disable the exception and *CMS* will not attempt to track the activity for this exception.
  - **Time Limit** Set the time limit in seconds (0-28800) for exception types that use a time limit. This value is used as the minimum or maximum amount of time for an activity. If this limit is surpassed, *CMS* will count this activity and compare it against the **Threshold** field. This field is requires an entry and cannot be left blank.
  - **Threshold** Enter the number of acceptable occurrences of this activity (0-999). Any occurrences beyond this number will generate an exception. If *CMS* should create an exception on the very first instance, enter **0** in this field. This field requires an entry and cannot be left blank.

8. When all necessary time limits and thresholds have been entered, select **Actions** > **Modify** from the menu bar.

*Supervisor* updates the exception configuration data for this vector and the status bar displays a **Successful** message.

# **Deleting vector exceptions**

This section provides the procedure for deleting existing vector exception configurations.

#### Steps

To delete a vector exception configuration:

1. From the Controller window, select **Commands** > **Exceptions**.

Supervisor displays the Exceptions window.

Dperations	Reports	)	
Operations:			
Agent Exceptions	-		
Real-time Exception Lo Split/Skill Exceptions	g		
Trunk Group Exception	ns		
VDN Exceptions Vector Exceptions			
ACD:			
Bison36vpe			•
<u>S</u> cript		Γ	Help

- 2. In the **ACD:** field, select the ACD that contains the vector and its exception configuration.
- 3. In the **Operations:** list, highlight **Vector Exceptions**.

#### 4. Select OK.

Supervisor displays the Vector Exception Administration window.

Actions       Edit       Help         The left       The left       The left         Vectors:       The left       The left					
	Time	Thursdayld			
Active	Limit	Threshold	Exception Type Time in vector (max)		
	ļo	0			
C Active		0	Number calls abandoned while in vector		
C Active		0	Number calls forced busy		
C Active		0	Number calls disconnected		
C Active		0	Number calls in an ACD split queue		
C Active		0	Number unsuccessful lookahead interflow attempts		
C Active		0	Number unsuccessful adjunct routing attempts		
			Bison36vpe		

- 5. In the **Vectors:** field, enter the name or number of the vector for which the exception configuration is to be deleted.
- 6. From the menu bar, select **Actions > Find one**.

*Supervisor* locates the agent exception configuration for the specified split/skill and displays the data in the appropriate fields. If the exception configuration data cannot be found, the status bar displays **0 matches found**.

To have all vectors returned in this step, leave the **Vectors:** field blank before performing the **Find one** action. *Supervisor* will return all vectors for which you have the *read* permission. You can then use the **Next** and **Previous** menu actions to cycle through the vectors.

7. From the menu bar, select **Actions > Delete**.

*Supervisor* deletes the exception configuration for this vector from the *CMS* database and displays a **Successful** message in the status bar.

### Vector exception definitions

The following table provides the definitions for the different vector exceptions:

In this field	Enter this value
Time in vector (max)	The maximum acceptable time in seconds that a call is in vector processing. This exception cannot trigger more than once per interval.

Number of calls abandoned while in vector	The maximum acceptable number of calls that are abandoned during vector processing in an interval. This exception cannot trigger more than once within an interval.
Number of calls forced busy	The maximum acceptable number of calls that encountered a <b>forced busy</b> step in a vector during an interval. This exception cannot trigger more than once per interval.
Number of calls disconnected	The maximum acceptable number of calls that are disconnected during vector processing during an interval. Disconnects can be caused by the <b>disconnect</b> vector command, by the vector disconnect timer, or because a call reached the end of vector processing without being queued. This exception cannot be triggered more than once per interval.
Number of calls in an ACD split or skill queue	The maximum acceptable number of calls to this vector that are in a split/skill queue.
Number of unsuccessful look ahead interflow attempts	The maximum acceptable number of calls to this vector that fail to interflow to another Communication Manager system during an interval. The <b>route-to</b> vector command causes a call to interflow. This exception cannot trigger more than once per interval.
Number of unsuccessful adjunct routing attempts	The maximum acceptable number of failures for a call in this vector to connect to an adjunct host computer during an interval. The failure of an <b>adjunct route link</b> vector command causes an unsuccessful adjunct routing attempt. This exception cannot trigger more than one exception per interval.

### **Vector exceptions report**

Use the vector exceptions report to view exceptions that have occurred for the selected vectors. For each vector exception, the report shows the time and type of exception.

### Before you begin

To be able to view data for a vector exception report, the following events must have occurred:

- One or more vector exceptions must have been activated at some time in the past.
- The exceptions must have occurred at some point. Otherwise, the report is blank.
- Active exceptions must be specified in the input window so that they are included in the report.

### Steps

To run an vector exceptions report:

1. From the Controller window, select **Commands** > **Exceptions**.

*Supervisor* displays the **Exceptions** window.

Exceptions			? ×	(
Operations	Reports			
Operations:	r			l
Agent Exceptions Real-time Exception Log				l
Split/Skill Exceptions				l
Trunk Group Exceptions VDN Exceptions				l
Vector Exceptions				l
				l
1			_	l
				l
				l
ACD:				l
Bison36vpe				l
<u>S</u> cript			<u>H</u> elp	
		OK	 Cancel	1
		3		

- 2. Select the **Reports** tab.
- 3. In the **ACD:** field, select the ACD that contains the vector on which to run the report.
- 4. In the **Reports:** list, highlight **Vector Exceptions**.
- 5. Select OK.

Supervisor displays the Vector Exceptions window.

Vector Exceptions	_ 🗆 ×
Inputs	
Date:	2/12/98
Vectors:	
Order by:	Time
Exceptions:	Fine in vector (max) Number calls abandoned while in vector Number calls forced busy Number calls forced busy Number calls in an ACD split queue Number unsuccessful look-ahead interflow attempts Number unsuccessful adjunct routing attempts
- Destination	
Vie <u>w</u> Report on Sc	reen
C Print Report on:	ddops3
	OK Cancel <u>H</u> elp
	Bison36vpe

- 6. In the **Date:** field, specify the date to view for the report. Entry of the date can be done through the following methods:
  - Enter MM/DD/YY format; for example, **10/06/01**.
  - Enter the relative day; for example, **0** for today, **-1** for yesterday, or **-7** for one week ago.
  - Enter a relative range; for example, -9-0 causes the report to display data for the past ten days including today.
  - Select a date from the drop-down list.
  - Select a date by using the Browse button.

This is a required field.

- 7. In the **Vectors:** field, specify the name or number of one or more vectors to run the report against. Entry of the vector can be done through the following methods:
  - Enter the name or number of the vector.
  - Select the vector from the drop-down list.
  - Select the vector by using the Browse button.

Multiple vectors can be entered in this field, but must be separated by a semicolon (;). This is a required field.

- 8. In the Order by: field, select one of the following sorting options:
  - Time The report results are sorted by the time the exceptions occurred.
  - Vector The report results are sorted by vector name or number.
- 9. In the **Exceptions:** field, select one or more exceptions to include in the report.

The exceptions selected in this field should be those that have been activated at some point in the past. Selecting exceptions that have not been activated will not return any data in the report.

- 10. In **Destination** group, select one of the following output options:
  - View Report on Screen The report is displayed on the screen.
  - **Print Report on:** The report is sent to the specified printer. Any printer available to the PC can be used and selected through the button at the right of the field.

#### 11. Select OK.

Supervisor sends the report to the specified output option.

A Vec	tor Exceptions		
<u>R</u> eport	<u>E</u> dit <u>F</u> ormat <u>T</u> ools <u>O</u> ptions	<u>H</u> elp	
	Date: 2/12/98		
Time	Vector Name	Exception	Time Threshold Limit
			Bison36vpe //

# Data collection exceptions report

Use the data collection exceptions report to view any event that affects the storage of contact center data. This includes the following:

- Starting or stopping data collection
- Resetting the clock
- A session (link) is down

This section contains the following topics:

- Before you begin on page 371
- Running a data collection exceptions report on page 371

### Before you begin

The following items should be read and understood before working with the data collections exceptions report:

- Exceptions must have occurred for the exception type that you want the report to cover. Otherwise, the report is blank.
- User IDs must have the *exception* permission for the ACD in order to be notified of a *link-down* exception.

### Running a data collection exceptions report

This section provides the procedure for running the data collection exceptions report so that any event that affects the storage of data can be viewed.

### Steps

To run the data collection exceptions report:

1. From the Controller window, select **Commands** > **Exceptions**.

Supervisor displays the **Exceptions** window.

Exceptions			? ×
Operations	Reports	)	
Operations: Agent Exceptions Real-time Exceptions Split/Skill Exceptions Trunk Group Exceptions VDN Exceptions Vector Exceptions	-		
ACD: Bison36vpe Script			⊻ <u>H</u> elp
		OK	Cancel

- 2. Select the Reports tab.
- 3. In the **Reports:** list, highlight **Data Collection Exceptions**.
- 4. Select OK.

Supervisor displays the Data Collection Exceptions window.

A Data Collection Exception	2	
Inputs		
ACDs:		
Dates:		
Destination		
C Print Report on:	HP Color	6
	OK Cancel	<u>H</u> elp

5. In the ACDs: field, select one or more ACDs for which you want to run the report.

This field accepts multiple values. Multiple ACDs must be separated by a semicolon (;).

- 6. In the **Dates:** field, enter the date the report will cover by using one of the following methods:
  - Enter MM/DD/YY format; for example, **10/06/01**.

- Enter the related day; for example, 0 for today, -1 for yesterday, or -7 for one week ago.
- Enter a relative range; for example, -9-0 causes the report to display data for the past ten days including today.
- Select the date from the drop-down list box.
- Select a date or date range by using the Browse button.

This field can accept multiple date values, but the dates must be separated by a semicolon (;). This field is required.

- 7. In **Destination** group, select one of the following output options:
  - View Report on Screen The report is displayed on the screen.
  - **Print Report on:** The report is sent to the specified printer. Any printer available to the PC can be used and selected through the button at the right of the field.
- 8. Select OK.

Supervisor sends the data collection exceptions report to the specified output method.

<u>R</u> eport	<u>E</u> dit	<u>F</u> ormat	$\underline{I}ools$	<u>O</u> ptions	<u>H</u> elp		
			_				
	ACE	)		Date	Time	Event	
R8vpe			11/	07/2000	9:21 AM		
R8vpe			11/	07/2000	9:26 AM	Data collection session down	
R8vpe			11/	07/2000	9:26 AM		
R8vpe			11/	07/2000	9:36 AM	Data collection started - new translations	
test			11/	07/2000	10:16 AM		
test			11/	07/2000	10:19 AM	Data collection started - new translations	
test			11/	07/2000	10:19 AM	Data collection session down	
test			11/	07/2000	10:19 AM		
R8vpe			11/	07/2000	10:24 AM		
R8vpe			11/	07/2000	10:29 AM	Data collection session down	
R8vpe			11/	07/2000	10:29 AM		
R8vpe			11/	07/2000	10:36 AM	Data collection started - new translations	
22R6ve			11/	08/2000	12:34 PM	Data collection turned off	
22R6ve			11/	09/2000	9:31 AM	Data collection started - new translations	
22R6ve			11/	09/2000	9:31 AM	Data collection clock was reset	
R8vpe			11/	13/2000	11:04 AM	Data collection turned off	

# Malicious call trace report

The Malicious Call Trace feature provides a way for a terminal user to notify a predefined set of users that he or she may be party to a malicious call, such as bomb threats, hackers, and so forth.

The following actions occur when the Malicious Call Trace feature is activated:

- The inbound phone line is prevented from "hanging up".
- Management is immediately alerted.
- The call is recorded (with an additional Communication Manager feature).
- All data regarding the call is stored.

The malicious call trace report is used to view detailed information on the occurrences of these calls. The report shows the date and time when each call occurred, the agent who received the call, and the involved split or skill. If the automatic number identification / station number identification (ANI/SID) network feature has been purchased and implemented, the report also shows where the call originated. This report is only available with *Supervisor*.

This section contains the following topics:

- Before you begin on page 374
- <u>Running a malicious call trace report</u> on page 374

### Before you begin

The following items should be read and understood before working with the malicious call trace report:

• To view the malicious call trace report, the user ID used to log in to this *Supervisor* session requires the *exception* permission for the split/skill that received the malicious call.

# Running a malicious call trace report

This section provides the procedure for running a malicious call trace report.

### Steps

To run a malicious call trace report:

1. From the Controller window, select **Commands** > **Exceptions**.

Supervisor displays the Exceptions window.

Exceptions				? X
Operations	Reports			
Operations:	r			
Agent Exceptions				
Real-time Exception Log Split/Skill Exceptions				- 11
Trunk Group Exceptions				- 11
VDN Exceptions				- 11
Vector Exceptions				- 11
				- 11
				-1
ACD:				
Bison36vpe			-	
Тризонзомре				_
<u>S</u> cript			<u>H</u> elp	
		[	 	ᆕ┚
		OK	Cancel	

- 2. Select the **Reports** tab.
- 3. In the **ACD:** field, select the ACD for which the report will gather data.
- 4. In the **Reports:** list, highlight **Malicious Call Trace by Location**.
- 5. Select OK.

Supervisor displays the Malicious Call Trace window.

A Malicious Call Trace		_ 🗆 X
Inputs		
Dates: 2/12/98		
Destination		
View Report on Screen		
Print Report on:	ddops3	4
	OK Cancel	<u>H</u> elp
		Bison36vpe

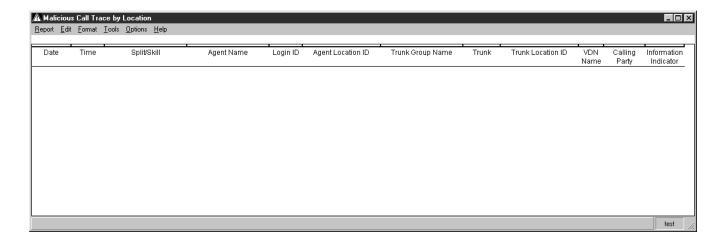
- 6. In the **Dates:** field, enter the date the report will cover by using one of the following methods:
  - Enter MM/DD/YY format; for example, **10/06/01**.
  - Enter the related day; for example, 0 for today, -1 for yesterday, or -7 for one week ago.

- Enter a relative range; for example, -9-0 causes the report to display data for the past ten days including today.
- Select the date from the drop-down list box.
- Select a date or date range by using the Browse button.

This field can accept multiple date values, but the dates must be separated by a semicolon (;). This field is required.

- 7. In **Destination** group, select one of the following output options:
  - View Report on Screen The report is displayed on the screen.
  - **Print Report on:** The report is sent to the specified printer. Any printer available to the PC can be used and selected through the button at the right of the field.
- 8. Select OK.

Supervisor sends the malicious call trace report to the specified output method.



# **Real-time exceptions log**

The real-time exception log lists the last ten exceptions in chronological order, with the oldest exception listed first. The log displays all types of exceptions for which the user has the *exception* permission, such as agent, split/skill, trunk group, VDN, and vector.

This section contains the following topics:

- Before you begin on page 377
- <u>Running the real-time exceptions log</u> on page 378

### Before you begin

The following items should be read and understood before working with the real-time exceptions log:

- When the log is first opened, the most recent exception is on the last line in the window. As long as the window remains open, the log automatically scrolls to display each new exception record. If the scroll bar is used to view the older records at the top of the log, automatic scrolling for new exceptions stops until the user scrolls back to the bottom of the log.
- Each exception record in the log supplies the following information:
  - The date and time that the exception occurred
  - The name of the ACD for which the exception occurred
  - The ACD element, such as a specific agent, split/skill, or VDN that was involved in the exception.

If names for these elements were assigned in the Dictionary, these will display instead. If the names are longer than the space that is allowed in the exception record, the names will be truncated.

- The information about an activity that fell outside of the exception conditions that you set.

Therefore, for a peg count exception, the exception record shows the occurrence threshold that you set, even though the number of occurrences may be substantially greater. For a timed exception, the exception record shows the time limit that you set, not the actual duration of an occurrence.

- The real-time exception log can hold a maximum of 100 records. If a new exception occurs when the log is full, the oldest exception is deleted so that the new exception can be recorded.

# Running the real-time exceptions log

This section provides the procedure for running the real-time exceptions log.

### Steps

To run the real-time exceptions log:

1. From the Controller window, select **Commands** > **Exceptions**.

Supervisor displays the Exceptions window.

Exceptions				?
Operations	Reports	)		
Operations:	ŕ			_
Agent Exceptions Real-time Exception Split/Skill Exception Trunk Group Excep VDN Exceptions Vector Exceptions	s			
ACD: Bison36vpe			V	
<u>S</u> cript			Help	
		OK	Cancel	1

- 2. In the ACD: field, select the ACD for which exceptions will be shown.
- 3. In the **Operations:** list, highlight **Real-time Exception Log**.
- 4. Select OK.

Supervisor displays the Real-Time Exception Log window.

🛕 Real-	Time Excep	tions Log	_ 🗆 ×
Date	Time	Description	<b></b>
03/11	7:06 PM	ACD Bison36vpe Agent 75051 reported audio difficulty on trunk	
03/11	7:06 PM	ACD Bison36vpe Agent 75051 reported audio difficulty on trunk	
03/11	7:07 PM	ACD Bison36vpe Agent 75051 reported audio difficulty on trunk	
			<b>•</b>
•			•
		Close	

. . . . .

# **Chapter 9: Administering user permissions**

The *User Permissions* subsystem is used to create *CMS* user IDs as well as assigning and administering user permissions such as *read*, *write*, and *exception* permissions for ACDs, splits/skills, trunk groups, VDNs, and vectors.

The default *CMS* administrator user ID, cms, provides access to the entire system. Using the cms ID, user IDs can be created for each person requiring access to the *CMS* system and set with the permissions necessary to perform job duties. Users should not share an ID since logging in with the same ID at multiple terminals uses more system resources than if each user had different IDs.

This section contains the following topics:

- <u>Before you begin</u> on page 380
- Example of user permissions on page 380
- User data on page 381
- <u>ACD access</u> on page 392
- Feature access on page 403
- Main Menu Addition Access on page 410
- Split/Skill access on page 416
- Trunk group access on page 427
- <u>Vector access</u> on page 438
- VDN access on page 449

# Before you begin

If an ACD Group is selected as the current ACD in the **User Permissions** window, only those operations that are valid for the ACD Group will appear in the **Operations:** list.

# **Example of user permissions**



Any user ID (normal)

Any user ID (normal or administrator) given *write* access to the *User Permission* feature will be able to alter their own permissions for all *CMS* subsystems.

The following table displays an example of permissions that would be necessary for a split supervisor:

If the contact center has one split called	And assigned to it are	The split 1 supervisor requires read/ write permissions for
Split 1	Trunk groups 22 and 23	Split 1 Trunk groups 22 and 23 Dictionary Exceptions

# **User data**

In order for users to use *Supervisor*, they must first be created through the *User Data* feature. Afterwards, users can use their assigned ID to log in through *Supervisor* and *CMS*. User IDs should only be created for those persons who will be using *Supervisor* as a part of their job duties in administering the contact center.

The User Data window is used for the following actions:

- Assign a CMS user ID.
- Specify a default CMS printer for a user ID.
- Specify a user ID as Normal or Administrator.
- Administer the maximum number of open simultaneous windows allowed for a user ID.
- Set the minimum refresh rate for real-time reports for a user ID.
- Set the default logon ACD for a user ID.

This section contains the following topics:

- Adding a CMS user on page 381
- Viewing CMS users on page 384
- Modifying CMS users on page 387
- Deleting CMS users on page 389

### Adding a CMS user

This section provides the procedure for adding a user through Supervisor.

### Before you begin

The following items should be read and understood before adding a user:

- A user ID must be created before any permissions can be assigned to it.
- Users added through the Sun Microsystems, Inc. Solaris system instead of the **User Data** window will not be able to run *CMS* without assuming the role of a valid user by using the **su** command. Solaris users will have a shell of /usr/bin/sh. The **User Data** window will not display users that were created through Solaris.
- Users added through the **User Data** window will automatically have *CMS* launch when they log in. The shell for these users will be /usr/bin/cms.
- The User Data window can be run through scripts and timetables.

### Permissions

Depending on the procedure to be performed, the following permissions must be observed:

- To display the **User Data** window and view user information, the user ID used to log in to this *Supervisor* session requires *read* permission for the **User Permissions** subsystem.
- To add, delete, or modify users through the **User Data** window, the user ID used to log in to this *Supervisor* session requires *write* permission for the **User Permissions** sub system.

### Steps

To add a CMS user ID:

1. From the Controller window, select **Tools > User Permissions**.

Supervisor displays the User Permissions window.

🚱 User Permissions		? ×
Operations Reports	Ì	
Operations:		
ACD Access		
Feature Access Main Menu Addition Access		
Split/Skill Access		
Trunk Group Access		
User Data Vector Access		
VDNAccess		
ACD:		
Bison36vpe		▼
Script		Help
	ОК	Cancel

The **Vector Access** and **VDN Access** menu items are listed if the Call Vectoring feature has been purchased.

2. In the ACD: field, select the ACD or ACD Group on which the user will be created.

The same user ID does not need to be created on each ACD. A user created on one ACD can be given permissions to the other ACDs.

3. In the **Operations:** list, highlight **User Data**.

#### 4. Select OK.

Supervisor displays the User Permissions User Data window.

🖋 User Permissions User Data 🛛 🛛 🔀
<u>Actions</u> <u>Edit</u> <u>H</u> elp
User ID:
User name:
Room number:
Telephone number:
Default printer name: (none)
Login type (select only one) :
Normal user
O Administrator
Maximum user window count (1-12): 4
Minimum refresh rate (seconds): 30
Login ACD: (none)
,

- 5. In the **User ID:** field, enter the new user ID to be created. The user ID must adhere to the following rules:
  - The user ID can be three to eight characters.
  - User IDs cannot contain certain diacritical, accented, special characters, or blanks (for example, á, ñ, ç, |, ©). If a user ID is entered with an invalid character, *Supervisor* displays an error message.

This is a required field.

6. In the **User name:**, **Room number:**, and **Telephone number:** fields, enter the appropriate information for this user.

These fields are optional and may be left blank.

7. In the **Default printer name:** field, select a default *CMS* printer from the drop-down list box for this user ID.

This field is optional and my be left as (none).

- 8. For Login type:, select the role of this user ID:
  - Normal user Select this type to designate those users whose job responsibilities do not include maintenance, configuration, and updating of CMS.

This role of user has only the *read* permission for the following features:

- Agent Administration
- Custom Reports/Report Designer
- Dictionary
- Exceptions

- Forecast
- Maintenance
- Reports
- Timetable
- Administrator Select this type to designate those users who job responsibilities include maintenance, configuration, or updating of CMS. This user role is assigned *read* and *write* permissions for all features.

### **A** Important:

Changing the role of the user after creation will not change any permissions assigned to the user. All permission changes need to be done manually.

9. In the **Maximum user window count (1-12):** field, enter the number of windows that the user may have open simultaneously. The default for this field is **4**.



Allowing many users to have multiple windows open will consume more *CMS* processor resources.

10. In the **Minimum refresh rate (seconds):** field, enter the number of seconds (3-600) in which data for real-time reports is retrieved again from the database and displayed for this user ID.



Faster refresh rates consume more CMS processor resources.

11. In the **Login ACD:** field, select the ACD which will be used to login this user ID. The user can change the current ACD after logging in, but each time the user logs in, the current ACD defaults to the value entered in this field.

If an ACD is selected in this field for log in and the user does not have any permissions for it, *Supervisor* displays an error message.

This is a required field and cannot be left with the default value of (none).

12. Select Actions > Add from the menu bar.

The user ID is created on the ACD specified earlier in the **User Permissions** dialog box. If the user ID already exists, *Supervisor* displays an **Already exists** message in the status bar.

## **Viewing CMS users**

This section provides the procedure for viewing one or more existing *CMS* users through the **User Data** window.

### Before you begin

The following items should be read and understood before attempting to view users through the **User Data** window:

• The default values in the **User Data** window should be cleared before attempting to perform a **Find one** or **List all** action unless these values should be included in the search.

### Permissions

Depending on the procedure to be performed, the following permissions must be observed:

- To display the **User Data** window and view user information, the user ID used to log in to this *Supervisor* session requires *read* permission for the **User Permissions** subsystem.
- To add, delete, or modify users through the **User Data** window, the user ID used to log in to this *Supervisor* session requires *write* permission for the **User Permissions** sub system.

### Steps

1. From the Controller window, select **Tools** > **User Permissions**.

Supervisor displays the User Permissions window.

User Permissions	? X
Operations Reports	
Operations:	
ACD Access	
Feature Access Main Menu Addition Access	- 8
Split/Skill Access	- 8
Trunk Group Access User Data	- 11
Vector Access	- 11
VDNAccess	- 8
1	- 11
ACD:	
Bison36vpe	
	- I I
Script Help	
OK Cancel	

The **Vector Access** and **VDN Access** menu items are listed if the Call Vectoring feature has been purchased.

2. In the **Operations:** list, highlight **User Data**.

#### 3. Select OK.

Supervisor displays the User Permissions User Data window.

🤹 User Permissions User Data 🛛 🛛 🗙
Actions Edit Help
User ID:
User name:
Room number:
Telephone number:
Default printer name: (none)
Login type (select only one) :
Normal user
O Administrator
Maximum user window count (1-12): 4
Minimum refresh rate (seconds): 30
Login ACD: (none)

4. Using the menu bar, select **Edit** > **Clear all**.

The information in all fields is removed. This includes the default information that appears when this window is first displayed.

- 5. There are two possible methods in searching for and displaying CMS user information:
  - List all Selecting this item from the Action menu will display a secondary window displaying all users whose settings match those in the fields of this window. If no information is present in the fields, all users are displayed. This method is convenient when the need arises to look for one or more user IDs.
  - Find one Selecting this item from the Action menu will take the information currently in all the fields of this dialog and query the database for users with matching settings. For example, having a 6 in the Maximum user window count (1-12): field with all other fields blank and selecting Find one will result in a search for all *CMS* users having a 6 for their Maximum user window count. If multiple users are found, each can be viewed by selecting the Next and Previous items under the Actions menu.

When using the **Find one** command, partial text strings are not supported in the search. Therefore, to view the settings for a user ID, the complete name must be entered in the **User ID:** field.

If multiple users are found using the **Find one** action, the **Next** action will not become disabled at the last user, but instead cause the first user found to be displayed again.

# **Modifying CMS users**

This section provides the procedure for modifying the settings for an existing CMS user.

### Before you begin

The following items should be read and understood before modifying users through the **User Data** window:

- If a user's login ACD is removed and the user tries to log into CMS, an acknowledgment tells the user either to contact the CMS administrator or to change the login ACD.
- Changing the login type for a user from **Administration** to **Normal** or vice versa does not change the permissions for that user ID. Permissions must be changed manually.
- Changes to maximum window count, minimum refresh rate, or default login ACD for a user do not take effect until the user logs out and back in again.

### Permissions

Depending on the procedure to be performed, the following permissions must be observed:

- To display the **User Data** window and view user information, the user ID used to log in to this *Supervisor* session requires *read* permission for the **User Permissions** subsystem.
- To add, delete, or modify users through the **User Data** window, the user ID used to log in to this *Supervisor* session requires *write* permission for the **User Permissions** subsystem.

### Steps

To modify the settings for an existing CMS user:

1. From the Controller window, select **Tools > User Permissions**.

Supervisor displays the User Permissions window.

Operations Operations: ACD Access Feature Access Main Menu Addition Access Split/Still Access Trunk Group Access User Data Vector Access VDN Access VDN Access	-
ACD Access Feature Access Main Menu Addition Access Split/Still Access Trunk Group Access User Data Vector Access	
Feature Access Main Menu Addition Access Split/Still Access Trunk Group Access User Data Vector Access	
Main Menu Addition Access Split/Skill Access Trunk Group Access User Data Vector Access	
Split/Skill Access Trunk Group Access User Data Vector Access	- 1
Trunk Group Access User Data Vector Access	
User Data Vector Access	
VDNACCBSS	
,	
ACD:	
Bison36vpe	
<u>S</u> cript	ala II
OK Ca	cih

The **Vector Access** and **VDN Access** menu items are listed if the Call Vectoring feature has been purchased.

- 2. In the **Operations:** list, highlight **User Data**.
- 3. Select OK.

Supervisor displays the User Permissions User Data window.

🦸 User Permissions User Data	X
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
User ID:	
User name:	
Room number:	
Telephone number:	
Default printer name: (none)	
Login type (select only one) :	
Normal user	
O Administrator	
Maximum user window count (1-12): 4	
Minimum refresh rate (seconds): 30	
Login ACD: (none)	

4. Clear all field default values by selecting Edit > Clear All from the menu bar.

- 5. In the **Login type (select only one):** field, select the login type for the user that will be modified.
- 6. Enter the name of the user to modify in the **User ID:** field.
- 7. Select Actions > Find one.

The settings for the specified user ID will populate their associated fields.

If the user ID was not found, try selecting the other login type in the **Login type (select only one):** field.

- 8. Modify the settings for this user as needed.
- 9. After all necessary modifications have been made, select Actions > Modify.

The settings for this user are updated and the status bar will display a **Successful** message.

### **Deleting CMS users**

This section provides the procedure for deleting an existing CMS user.

### Before you begin

The following items should be read and understood before deleting users through the **User Data** window:

- Deleting a user ID added through the **User Data** window of CMS will remove that ID and its associated permissions from *CMS* and the Solaris system.
- Deleting a user who had custom reports, designer reports, or timetables, will result in an
  acknowledgment window asking if those items should be moved to your user ID. If they
  are moved and there is a conflict between the assigned names, a prompt window will
  appear allowing the moved items to be renamed. If not moved, any custom reports,
  designer reports, and timetables will be deleted along with the user ID.

### Permissions

Depending on the procedure to be performed, the following permissions must be observed:

- To display the **User Data** window and view user information, the user ID used to log in to this *Supervisor* session requires *read* permission for the **User Permissions** subsystem.
- To add, delete, or modify users through the **User Data** window, the user ID used to log in to this *Supervisor* session requires *write* permission for the **User Permissions** sub system.

### Steps

To delete an existing CMS user:

1. From the Controller window, select **Tools > User Permissions**.

Supervisor displays the User Permissions window.

🕼 User Permissions		? ×
Operations Reports	)	
Operations:		
ACD Access		
Feature Access Main Menu Addition Access		
Split/Skill Access		
Trunk Group Access User Data		
Vector Access		
VDNAccess		
ACD:		
Bison36vpe		<b>▼</b>
<u>S</u> cript		Help
	OK	Cancel

The **Vector Access** and **VDN Access** menu items are listed if the Call Vectoring feature has been purchased.

- 2. In the **Operations:** list, highlight **User Data**.
- 3. Select OK.

Supervisor displays the User Permissions User Data window.

🖋 User Permissions User Data 🛛 🛛 🛛
<u>Actions</u> <u>E</u> dit <u>H</u> elp
User ID:
User name:
Room number:
Telephone number:
Default printer name: (none)
Login type (select only one) :
Normal user
O Administrator
Maximum user window count (1-12): 4
Minimum refresh rate (seconds): 30
Login ACD: (none)

4. Using the menu bar, select **Edit** > **Clear all**.

The information in all fields is removed. This includes the default information that appears when this window is first displayed.

- 5. In the **Login type (select only one):** field, select the login type of the user that will be deleted.
- 6. Enter the name of the user in the User ID: field.

If the user ID is not known, the other fields of this dialog box can be used to enter information that can return all users having matching information. For example, the **User name:** and **Room number:** fields can have information entered in them.

7. After user-identifying data has been entered in the fields, select **Actions** > **Find one** from the menu bar.

The status bar will return the number of matches found. Select **Actions** > **Next** to navigate to the next user in the list, if necessary.

8. When the dialog box displays the correct user, select **Actions** > **Delete** from the menu bar.

The identified user is deleted from the system and the status bar displays a **Successful** message.

# ACD access

The **ACD Access** window is used to view and modify the user permissions for a selected real or pseudo ACD. This window can also be used to turn exception notification on or off for a selected ACD.

This section contains the following topics:

- Before you begin on page 392
- Permissions on page 393
- Adding ACD access on page 393
- Viewing ACD access on page 395
- Listing all ACD access on page 396
- Modifying ACD access on page 398
- Deleting ACD access on page 400

### Before you begin

The following items should be read and understood before working with ACD access permissions:

- By default, a newly-created user is granted *read*, *write*, and *exceptions* permissions for all real and pseudo ACDs.
- User permissions for ACD access are stored separately from the user ID created through the <u>Adding a CMS user</u> procedure. Because of this, user permissions for the ACD can be deleted and modified without affecting the state of the user ID.
- If the ACD permissions for a user are changed, the change does not take effect until the user logs out and logs back in again.
- If the *read* and *write* permissions are disabled for a user, then the user will not be able to access any splits/skills, trunk groups, vectors, or VDNs in that ACD. If *read* is enabled and *write* is disabled, the user will not be able to modify splits/skills, trunk groups, vectors, or VDNs in that ACD.
- If the permissions for the default login ACD of a user are removed, the user must have another login ACD assigned.
- A user must be created through the **User Data** window before any ACD permissions can be assigned.

- Users should only have the ACD permissions necessary to perform job duties. Assigning only those necessary user permissions will ensure the best system performance.
- In some instances, it may be necessary to restrict a user from viewing information on an ACD. To do so, either delete the permissions definition for the user or remove all permissions for the necessary ACDs. Deleting the ACD permissions definition for a user will save more disk space.

### Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view user permission settings in the **ACD Access** window, the user ID used to log in to this *Supervisor* session requires *read* permission for the **User Permissions** subsystem.
- To add, delete, or modify user permission settings in the **ACD Access** window, the user ID used to log in to this *Supervisor* session requires *write* permission for the **User Permissions** subsystem.

# Adding ACD access

This section provides the procedure for adding ACD access permissions for a *CMS* user. Since a user permission definition for ACD access is created by default when the user ID is created, this procedure is only necessary if that permission definition has been deleted.

### Steps

To add a user permission definition for an ACD:

1. On the Controller window, select **Tools > User Permissions**.

Supervisor displays the User Permissions window.

Operations     Preports       Operations:     ACD Access       Feature Access     Feature Access       Main Menu Addition Access     Split/Skill Access       Split/Skill Access     Trunk Group Access       User Data     Vector Access       Vector Access     VDN Access       ACD:     Bison36vpe       Script     Help	🚱 User Permissions		? ×
ACD Access Feature Access Main Menu Addition Access Split/Skill Access Trunk Group Access User Data Vector Access VDN Access ACD: Bison36vpe Script	Operations Reports	Ì	
Feature Access Main Menu Addition Access Split/Stil Access Trunk Group Access User Data Vector Access VDN Access VDN Access ACD: Bison36vpe Script <u>H</u> elp	Operations:		
Main Menu Addition Access       Split/Skil Access       Trunk Group Access       User Data       Vector Access       VDN Access       VDN Access       ACD:       Bison36vpe       Script			
Split/Skill Access Trunk Group Access User Data Vector Access VDN Access ACD: Bison36vpe			
Trunk Group Access User Data Vector Access VDN Access ACD: Bison36vpe ∑cript Help			
Vector Access VDN Access ACD: Bison36vpe Script	Trunk Group Access		
VDNAccess			
Bison36vpe			
Bison36vpe	J		
Bison36vpe			
Bison36vpe			
Bison36vpe	1.00		
Script			
	Bison36vpe		<u> </u>
	Script		Help
OK Cancel			
		OK	Cancel

- 2. In the **Operations:** list, highlight **ACD Access**.
- 3. Select OK.

Supervisor displays the User Permissions ACD Access window.

🍂 User Permissions ACD Access	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
User ID:	
ACDs:	
Read:	
Write:	
Exceptions:	
	Bison36vpe

4. In the **User ID:** field, enter the ID of the user for whom to create an ACD permissions definition.

This field is required.

5. In the **ACD:** field, enter the names or numbers for one or more ACDs that this user will be able to access (real, pseudo, or group).

Multiple values in this field must be separated with a semicolon (;).

- 6. Place a check mark in the permissions that will be assigned to this user:
  - Read: User can view but not modify information for the specified ACDs.

- Write: User can modify information on the specified ACDs. This permission requires that the user also have the *read* permission.
- Exceptions: User will receive notification of exceptions occurring on the specified ACDs.
- 7. After assigning the necessary permissions, select **Actions** > **Add** from the menu bar.

The ACD permissions for this user are saved.

It is possible to add permission definitions for multiple users at one time. To do so, enter multiple *CMS* users in the **User ID**: field and separate them with semicolons (;). The ACDs specified in the **ACDs**: field and the selected permissions are then created for these user IDs when the **Add** action is performed.

# Viewing ACD access

This section provides the procedure for viewing the ACD access permissions for a *CMS* user.

#### Steps

To view the ACD permission definition for a CMS user:

1. On the Controller window, select **Tools** > **User Permissions**.

Supervisor displays the User Permissions window.

User Permissions			?	×
Operations Re	ports	Ì		
Operations:				L
ACD Access				L
Feature Access Main Menu Addition Access				L
Split/Skill Access				L
Trunk Group Access				L
User Data Vector Access				L
VDNAccess				L
				L
				L
				L
				L
ACD:				L
Bison36vpe			•	L
Script			Help	L
	[[	ОК	Cancel	
	<u>i</u>			

2. In the **Operations:** list, highlight **ACD Access**.

3. Select OK.

Supervisor displays the User Permissions ACD Access window.

🏽 🏄 User Permissions ACD /	Access	×
<u>Actions Edit H</u> elp		
+ 2 9 / 4		
User ID:		
ACD s:		
Read:	Γ	
Write:		
Exceptions:		
		Bison36vpe

4. In the **User ID:** field, enter the ID of the *CMS* user for which the permissions for ACDs are to be viewed.

This field is required.

When searching for the user permissions definitions on specific ACDs, these ACDs can be entered in the **ACDs:** field. Multiple entries must be separated by a semicolon (;).

5. From the menu bar, select **Actions** > **Find one**.

The status bar displays how many matching permission definitions are available. The fields of this window display the user permissions definition for the first ACD.

If more than one ACD is returned, use the **Next** action to view the permission definitions for the other ACDs.

# Listing all ACD access

This section provides the procedure for listing the ACD permission definitions for all *CMS* users.

To list all ACD permission definitions for all CMS users:

1. On the Controller window, select **Tools** > **User Permissions**.

Supervisor displays the User Permissions window.

User Permissions		? ×
Operations Reports		
Operations:		
ACD Access		
Feature Access Main Menu Addition Access		
Split/Skill Access		
Trunk Group Access User Data		
Vector Access		
VDN Access		
1		
ACD:		
Bison36vpe		•
Script		Help
	OK	Cancel

- 2. In the **Operations:** list, highlight **ACD Access**.
- 3. Select OK.

Supervisor displays the User Permissions ACD Access window.

👷 User Permissions ACD Access	×
Actions Edit Help	
User ID:	
ACDs:	
Read: 🗖	
Write:	
Exceptions:	
	Bison36vpe

4. From the menu bar, select **Actions** > **List all**.

All user permission definitions are displayed with their corresponding ACDs. Only those ACDs for which you have read permission will be shown.

User ID	Read	Write	Exceptions	ACD	ACD Name
Test	у	n	n	1	ACD1
Test	ÿ	n	n	2	ACD2
Test	y y	n	n	3	ACD3
Test	ÿ	n	n	4	ACD4
Test	y y	n	n	20	Pseudo ACD
Test	ÿ	n	n	21	ACD21
bob	y y	v	y	1	ACD1
ьор	ÿ	ÿ	ÿ	2	ACD2
bob	y y	y.	y	3	ACD3
ьор	ÿ	ÿ	ÿ	4	ACD4
bob	y y	y.	y	20	Pseudo ACD
bob	ÿ	ÿ	ÿ	21	ACD21
cliff	y y	n	y	1	ACD1
cliff	ÿ	n	ÿ	2	ACD2
cliff	y y	y	y	3	ACD3
cliff	ÿ	ÿ	n	4	ACD4
cliff	y y	y	n	20	Pseudo ACD
cliff	ÿ	ÿ	n	21	ACD21
стор	n	n	n	1	ACD1
cmop	n	n	n	2	ACD2
CMOD	v	n	Ų	3	ACD3

### Modifying ACD access

This section provides the procedure for modifying the ACD permission definitions for a CMS user.

If all ACD permissions are to be denied for a user, deleting the permissions definition for the user will save more disk space and accomplish the same goal.



### **A** Important:

If the *read* permissions is denied for the ACD that the user logs into, that user will no longer be able to log on. A new default login ACD must be set for the user.

To modify the ACD permissions definition for a CMS user:

1. On the Controller window, select **Tools > User Permissions**.

Supervisor displays the User Permissions window.

User Permissions		? ×
Operations Reports		
Operations:		
ACD Access Feature Access		
Main Menu Addition Access		
Split/Skill Access		
Trunk Group Access User Data		
Vector Access		
VDN Access		
1		
ACD:		
- Bison36vpe		•
Cariat		Help
<u>S</u> cript		
	OK	Cancel

- 2. In the **Operations:** list, highlight **ACD Access**.
- 3. Select OK.

Supervisor displays the User Permissions ACD Access window.

A User Permissions ACD Access	×
Actions Edit Help	
User ID:	
ACDs:	
Read: 🔽	
Write:	
Exceptions:	
	Bison36vpe

- 4. In the User ID: field, enter the ID of the
- 5. CMS user for which the permissions for ACDs are to be modified.

When searching for the user permissions definitions on specific ACDs, these ACDs can be entered in the **ACDs:** field. Multiple entries must be separated by a semicolon (;). These entries can include real ACDs, pseudo-ACDs, or ACD Groups.

6. From the menu bar, select **Actions > Find one**.

The status bar displays how many matching permission definitions are available. The fields of this window display the user permissions definition for the first ACD.

If more than one ACD is returned, use the **Next** action to view the permission definitions for the other ACDs.

- 7. Once the correct permission definition is displayed in the window, change the permissions by adding or removing check marks in the **Read:**, **Write:**, or **Exceptions:** check boxes.
- 8. Once the permissions have been changed to the necessary settings, select **Actions** > **Modify** from the menu bar.

The user permissions definition for this ACD is updated and the status bar displays a **Successful** message.

## **Deleting ACD access**

This section provides the procedure for deleting the ACD permission definition for a *CMS* user.



If the user permissions definition is deleted for the ACD that the user logs into, that user will no longer be able to log on. A new default login ACD must be set for the user. Deleting the permissions definition does not restrict the permissions for the user, but actually deletes the user from the specified ACD. This action does not affect the user ID created through the **User Data** feature.

To delete the ACD permissions definition for a CMS user:

1. On the Controller window, select **Tools** > **User Permissions**.

Supervisor displays the User Permissions window.

Operations  Operations:  ACD Access Feature Access Main Menu Addition Access Split/Still Access Split/Still Access
ACD Access Feature Access Main Menu Addition Access Split/Still Access
Feature Access Main Menu Addition Access Split/Still Access
Main Menu Addition Access Split/Skill Access
Split/Skill Access
Trunk Group Access
User Data Vector Access
VDNAccess
ACD:
Bison36vpe
Script Help
OK Cancel

- 2. In the **Operations:** list, highlight **ACD Access**.
- 3. Select OK.

Supervisor displays the User Permissions ACD Access window.

& User Permissions ACD Access	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
User ID:	
ACDs:	
Read: 🗖	
Write:	
Exceptions:	
	Bison36vpe

4. In the **User ID:** field, enter the ID of the *CMS* user for which the permissions for ACDs are to be modified.

When searching for the user permissions definitions on specific ACDs, these ACDs can be entered in the **ACDs:** field. Multiple entries must be separated by a semicolon (;). These entries can include real ACDs, pseudo-ACDs, or ACD Groups.

5. From the menu bar, select **Actions > Find one**.

The status bar displays how many matching permission definitions are available. The fields of this window display the user permissions definition for the first ACD.

If more than one ACD is returned, use the **Next** action to view the permission definitions for the other ACDs.

6. Once the correct permission definition is displayed in the window, select **Actions** > **Delete** from the menu bar.

The ACD permissions definition for this user is deleted and the status bar displays a **Successful** message.

7. Once the permissions have been changed to the necessary settings, select **Actions** > **Modify** from the menu bar.

The user permissions definition for this ACD is updated and the status bar displays a **Successful** message.

# **Feature access**

The **Feature Access** window is used to view and modify the permissions available to a *CMS* user ID for the following features:

- Agent Administration
- Call Center Administration
- Custom Reports
- Dictionary
- Exceptions
- Forecast
- Maintenance
- Reports
- CMS System Setup
- Timetable
- User Permissions
- UNIX® System

The permissions assigned to a user will affect the appearance of the *Supervisor* Controller window. For example, a user without permissions for the **Dictionary** feature will not have a corresponding toolbar button on the Controller window.

### Contents

This section contains the following topics:

- <u>Before you begin</u> on page 404
- Permissions on page 404
- <u>Viewing Feature Access user permissions</u> on page 405
- Listing all Feature Access user permissions on page 406
- Modifying Feature Access user permissions on page 408

## Before you begin

The following items should be read and understood before working with **Feature Access** permissions:

- Feature Access permissions cannot be modified for the cms and cmssvc user IDs. This prevents a user with access to the User Permissions feature from disabling access to all or part of *CMS* for the administrator or services personnel.
- If the **Feature Access** permissions for a user are modified, the changes do not take effect until the user logs off and back on again.
- A user ID must be created through the **User Data** feature before that user can have **Feature Access** permissions assigned.
- Default Feature Access permissions are assigned when a user ID is created. The Administrator type of user ID has permissions for all features. The Normal type of user ID is given *read* permissions for all features except User Permissions, System Setup, Call Center Administration, and Forecasting. User ID types are set through the User Data feature. Avaya CMS Forecast is purchased separately.
- Assigning a user the *write* permission for the **User Permissions** feature allows that user to change permissions for all users.
- A user ID cannot have *write* permissions without also having *read* permissions.
- If a user does not have *read* permission for a feature, that feature will not be displayed as a toolbar button or menu item in the *Supervisor* Controller window.
- Assigning only the necessary access permissions ensures the best system performance.

# Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view the **Feature Access** window, the user ID used to log in to this *Supervisor* session requires *read* permission for the **User Permissions** subsystem.
- To add, delete, or modify settings through the **Feature Access** window, the user ID used to log in to this *Supervisor* session requires *write* permission for the **User Permissions** subsystem.

# **Viewing Feature Access user permissions**

This section provides the procedure for viewing **Feature Access** permissions for a *CMS* user.

#### Steps

To view the Feature Access permissions for a CMS user:

1. On the Controller window, select **Tools** > **User Permissions**.

Supervisor displays the User Permissions window.

User Permissions			?	х
Operations Re	ports	Ì		
Operations:				
ACD Access				
Feature Access Main Menu Addition Access				
Split/Skill Access				
Trunk Group Access				
User Data				
Vector Access VDN Access				
VLNACCESS				
1				
ACD.				
ACD:				
Bison36vpe			<b>•</b>	
Script			Help	
Tenhan			<u></u>	
		ПК	Cancel	
	<u>i</u>			

- 2. In the **Operations:** list, highlight **Feature Access**.
- 3. In the **ACD:** field, select the ACD or ACD Group on which you want to view user permissions for its feature set.

4. Select OK.

Supervisor displays the User Permissions Feature Access window.

Actions Ed		eature Acce	ss <b>I</b>
	, Read ┌─ Read	Write ∏ Write	Feature Agent Administration
	☐ Read ☐ Read ☐ Read	☐ Write ☐ Write ☐ Write	Call Center Administration Custom Reports Dictionary
	☐ Read ☐ Read	☐ Write ☐ Write	Exceptions Forecast
	☐ Read ☐ Read ☐ Read	☐ Write ☐ Write ☐ Write	Maintenance Reports CMS System Setup
	☐ Read ☐ Read	☐ Write ☐ Write	Timetable User Permissions
		☐ Write	UNIX (r) System

5. In the User IDs: field, enter the ID of an existing CMS user.

This field can accept more than one user ID. Multiple IDs must be separated by a semicolon (;).

6. From the menu bar, select **Actions > Find one**.

*Supervisor* will display the permissions for the first user found. If multiple user IDs were entered, the status bar will display the number of matches found.

If multiple matches were found, use the **Actions** > **Next** command to navigate through the user IDs and their permissions.

# Listing all Feature Access user permissions

This section provides the procedure for listing the **Feature Access** permissions for all *CMS* users on an ACD or ACD Group.

To list the Feature Access permissions for all CMS users:

1. On the Controller window, select **Tools > User Permissions**.

Supervisor displays the User Permissions window.

User Permissions		? ×
Operations Reports	)	
Operations:		
ACD Access Feature Access		
Main Menu Addition Access		
Split/Skill Access		
Trunk Group Access User Data		
Vector Access		
VDNAccess		
1		
ACD:		
Bison36vpe		•
<u>S</u> cript		Help
	······	
	OK.	Cancel

- 2. In the **Operations:** list, highlight **Feature Access**.
- 3. In the **ACD:** field, select the ACD or ACD Group to view the user permissions for its feature set.
- 4. Select OK.

Supervisor displays the User Permissions Feature Access window.

<sup>e</sup> User Permissions Feature Access            Actions         Edit         Help           Image: Imag				
User IDs:				
Read Write Feature				
🖵 Read 🦵 Write 🛛 Agent Administration				
🗖 Read 🔲 Write 🛛 Call Center Administration				
🗖 Read 🦵 Write 🛛 Custom Reports				
🥅 Read 🥅 Write Dictionary				
🗖 Read 🧮 Write Exceptions				
🗖 Read 🧮 Write Forecast				
🗖 Read 🧮 Write Maintenance				
🗖 Read 🧮 Write Reports				
🥅 Read 🧮 Write 🛛 CMS System Setup				
🥅 Read 🥅 Write Timetable				
🥅 Read 🧮 Write 🛛 User Permissions				
🔽 Write 🛛 UNIX (r) System				

5. From the menu bar, select **Actions > List all**.

*Supervisor* displays a secondary window listing all users and their associated feature permissions.

# **Modifying Feature Access user permissions**

This section provides the procedure for modifying **Feature Access** permissions for a *CMS* user on an ACD or ACD Group.

### Steps

To modify Feature Access permissions for a CMS user:

1. On the Controller window, select **Tools > User Permissions**.

Supervisor displays the User Permissions window.

User Permissions			?
Operations	Reports	)	
Operations:	ŕ		
ACD Access			
Feature Access Main Menu Addition A	-C8%		
Split/Skill Access	00000		
Trunk Group Access			
User Data Vector Access			
VDNAccess			
100			
ACD:			
Bison36vpe			<b>~</b>
Script			Help
		ОК	Cancel
		3	

- 2. In the **Operations:** list, highlight **Feature Access**.
- 3. In the **ACD:** field, select the ACD or ACD Group on which the user permissions for its feature set will be modified.

#### 4. Select OK.

Supervisor displays the User Permissions Feature Access window.

Actions Ec		eature Acce	222
	2 <b>4 7</b>		
User IDs:			
	Read	Write	Feature
	🕅 Read	🔲 Write	Agent Administration
	🕅 Read	🗌 Write	Call Center Administration
	🕅 Read	🔲 Write	Custom Reports
	🕅 Read	🕅 Write	Dictionary
	🕅 Read	🕅 Write	Exceptions
	🕅 Read	🕅 Write	Forecast
	🕅 Read	🕅 Write	Maintenance
	🕅 Read	🕅 Write	Reports
	🥅 Read	🕅 Write	CMS System Setup
	🥅 Read	🕅 Write	Timetable
	🕅 Read	🗌 Write	User Permissions
		∏ Write	UNIX (r) System

- 5. In the **User IDs:** field, enter the ID of an existing *CMS* user.
- 6. From the menu bar, select **Actions > Find one**.

Supervisor will display the permissions for the user.

A check mark in a check box signifies that the associated feature permission is enabled for the user.

- 7. Change the **Read** and **Write** permissions as necessary by placing or removing check marks in the check boxes for each feature.
- 8. When the necessary changes have been made to the user feature permissions, select **Actions > Modify** from the menu bar.

The feature access permissions for this user ID are updated and the status bar displays a **Successful** message.

# **Main Menu Addition Access**

The **Main Menu Addition Access** feature is used to control which custom menu items appear on the *CMS* Main Menu for a user. Custom menu items are created through the **Main Menu Addition** feature which is located in the **System Setup** screen from the *CMS* ASCII interface.

These menu items cannot be created through Supervisor.

The custom menu items display on the *CMS* Main Menu which is seen through either *Terminal Emulator*, a telnet session to the *CMS* server, or the *CMS* console. The custom menu items do not display in the *Supervisor* Controller Window.

### Contents

This section contains the following topics:

- Before you begin on page 410
- Permissions on page 411
- <u>Viewing Main Menu Addition Access</u> on page 411
- Listing all Main Menu Addition Access on page 412
- <u>Assigning or modifying Main Menu Addition Access</u> on page 414

### Before you begin

The following items should be read and understood before working with **Main Menu Addition Access**:

- If the assigned **Main Menu Addition Access** permission for a user is disabled, the custom menu item will not be displayed on the *CMS* Main Menu for that user.
- If a the **Main Menu Addition Access** permission is changed for a user, those changes will not take effect until the user logs out and back in again.
- A user ID must be created through the **User Data** feature before assignments or changes can be made to that user ID through the **Main Menu Addition Access** feature.
- Main Menu additions must be created through **System Setup** before these custom menu items can be assigned to users.

### Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view **Main Menu Addition Access** user configurations, the user ID used to log in to *CMS* requires *read* permission for the **User Permissions** subsystem.
- To add, delete, or modify **Main Menu Addition Access** user configurations, the user ID used to log in to *CMS* requires *write* permission for the **User Permissions** subsystem.

# **Viewing Main Menu Addition Access**

This section provides the procedure for viewing *CMS* user configurations for **Main Menu Addition Access**.

### Steps

To view the Main Menu Addition Access configuration for a user:

1. On the Controller window, select **Tools > User Permissions**.

Supervisor displays the User Permissions window.

🖗 User Permissions			? ×
Operations Re	eports	Ì	
Operations:			
ACD Access			
Feature Access Main Menu Addition Access			
Split/Skill Access			
Trunk Group Access			
User Data Vector Access			
VDNAccess			
ACD:			_
Bison36vpe			• I
Script			Help
			Tob
	[	OK I	Cancel
	L		Cancer

2. In the Operations: list, highlight Main Menu Addition Access.

3. Select OK.

Supervisor displays the User Permissions Main Menu Addition Access window.

🥀 User Permissions Main Menu Addition Access 📃 🗖 🗖 🔀
<u>Actions</u> <u>E</u> dit <u>H</u> elp
Available Additions:
User IDs: cmssvc
Addition: Services
Access: 🔽
1 matches found

4. In the **User IDs:** field, enter a *CMS* user ID that has been previously defined through the **User Data** feature.

This field can accept the entry of multiple users at one time. Multiple entries must be separated by a semicolon (;).

5. From the menu bar, select **Actions > Find one**.

*Supervisor* retrieves the **Main Menu Addition Access** information for the specified *CMS* user ID and displays this information in the remaining fields.

If multiple users were specified in the **User IDs:** field, the other users and their configurations can be seen by using **Actions** > **Next** from the menu bar.

# **Listing all Main Menu Addition Access**

This section provides the procedure for listing all **Main Menu Addition Access** configurations that have been assigned to *CMS* users.

To list all Main Menu Addition Access configurations for CMS users:

1. On the Controller window, select **Tools > User Permissions**.

Supervisor displays the User Permissions window.

User Permissions		? ×	I
Operations Reports	)		
Operations:			
ACD Access Feature Access			l
Main Menu Addition Access			l
Split/Skill Access			l
Trunk Group Access User Data			l
Vector Access			l
VDNAccess			l
,			l
			l
			l
ACD:			l
Bison36vpe		<b>-</b>	l
Script		Help	
		<u></u>	l
	OK	Cancel	

- 2. In the **Operations:** list, highlight **Main Menu Addition Access**.
- 3. Select OK.

Supervisor displays the User Permissions Main Menu Addition Access window.

🤹 User Permissions Main Menu Addition Access	_ 🗆 X
Actions Edit Help	
Available Additions:	
User IDs: cmssvc	
Addition: Services	
Access:	
1 matches found	

4. From the menu bar, select **Actions** > **List all**.

*Supervisor* displays a secondary window listing all *CMS* users that have custom menu items assigned and the permissions for those custom menu items.

🏚 User	Permissi	ons ACD Access - List All		×
Actions	<u>E</u> dit <u>H</u> el	p		
User ID	Access	Addition		
CMSSVC	у	Services		
JohnDoe	у	Date		
MaryS	у	CustomItem1		
3 matche	es found; p	ermitted ones displayed	21	1

# **Assigning or modifying Main Menu Addition Access**

This section provides the procedure for assigning or modifying a custom Main Menu item for a *CMS* user.

#### Steps

To assign or modify a custom Main Menu item for a CMS users:

1. On the Controller window, select **Tools > User Permissions**.

Supervisor displays the User Permissions window.

💱 User Permissions		? ×
Operations Reports	)	
Operations:		
ACD Access		
Feature Access Main Menu Addition Access		
Split/Skill Access		
Trunk Group Access User Data		
Vector Access		
VDNAccess		
1		
ACD:		
Bison36vpe		•
Script		Help
	OK	Cancel

2. In the Operations: list, highlight Main Menu Addition Access.

#### 3. Select OK.

Supervisor displays the User Permissions Main Menu Addition Access window.

∉ User Permissions Main Menu Addition Access 📃 🗖	
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
Available Additions:	
User IDs: cmssvc	
Addition: Services	
Access: 🔽	
1 matches found	
I matches round	

4. In the **User IDs:** field, enter a *CMS* user ID that has been previously defined through the **User Data** feature.

This field can accept the entry of multiple users at one time. Multiple entries must be separated by a semicolon (;).

5. From the menu bar, select **Actions > Find one**.

*Supervisor* retrieves the Main Menu Addition Access information for the specified *CMS* user ID and displays this information in the remaining fields.

If multiple users were specified in the **User IDs:** field, the other users and their configurations can be seen by using **Actions** > **Next** from the menu bar.

- 6. In the **Addition:** field, enter the custom menu item to be assigned or modified for the specified *CMS* user.
- 7. In the **Access:** check box, place a check mark to enable this custom menu item or remove the check mark to disable this menu item for the specified *CMS* user.
- 8. From the menu bar, select **Actions > Modify**.

The user configuration is updated and the status bar displays a Successful message.

Only the current *CMS* displayed in the **User IDs:** field is modified. If other user IDs are available through using the **Next** command, each one will require the **Modify** action for assignments to be applied.

# Split/Skill access

This section provides the procedures for working with user permissions regarding splits/ skills.

For users providing administration for splits/skills or running split/skill reports, it is necessary for them to have the proper split/skill permissions to perform their job functions.

Split/skill exceptions notification is also configured through this interface. Users who are given the *Exceptions* permission will be notified of split/skill exceptions when they occur.

This section contains the following topics:

- Before you begin on page 416
- Permissions on page 417
- Adding split/skill user permissions on page 417
- <u>Viewing split/skill user permissions</u> on page 419
- Listing all split/skill user permissions on page 421
- Modifying split/skill user permissions on page 422
- <u>Deleting split/skill user permissions</u> on page 424

### Before you begin

The following items should be read and understood before working with split/skill permissions:

- A CMS user ID must be created through the **User Data** feature before split/skill permissions can be assigned.
- When a new user ID is created through the **User Data** feature, split/skill permission definitions for that user are not created. This is done to conserve disk space. When a split/skill permissions definition does not exist for a user ID, *CMS* will deny *read* and *write* access to splits/skills.
- A user ID must first have permissions for the ACD on which the split/skill resides before split/skill permissions can be assigned. If a user ID is assigned split/skill permissions and does not have the appropriate ACD permissions, *Supervisor* displays an error message.
- A user ID cannot be assigned the *write* permission without first having the *read* permission.
- Assigning only those permissions that are necessary for each user ID ensures the best system performance.

### Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view split/skill user permissions, the user ID used to log in to this *Supervisor* session requires *read* permission for the **User Permissions** subsystem.
- To add, delete, or modify split/skill user permissions, the user ID used to log in to this *Supervisor* session requires *write* permission for the **User Permissions** subsystem.

# Adding split/skill user permissions

This section provides the procedure for adding a split/skill permissions definition for a *CMS* user.

### Before you begin

The following items should be read and understood before adding a split/skill permissions definition for a *CMS* user:

- If a user does not have corresponding ACD permissions for the permissions set for them on the split/skill, *Supervisor* displays an error message.
- When the permissions definition for a user is created, the split/skill permissions do not take effect until the user logs off and back on again.

To add a split/skill permissions definition for a CMS user:

1. On the Controller window, select **Tools > User Permissions**.

Supervisor displays the User Permissions window.

🚱 User Permissions		? ×
Operations Reports		
Operations:		
ACD Access Feature Access		
Main Menu Addition Access		
Split/Skill Access		
Trunk Group Access User Data		
Vector Access		
VDNAccess		
4.00		
ACD:		
Bison36vpe		<u> </u>
<u>S</u> cript		<u>H</u> elp
<u></u>	·····	
	OK	Cancel

- 2. In the **Operations:** list, highlight **Split/Skill Access**.
- 3. In the **ACD**: field, select the ACD or ACD Group containing the split/skill for which the user will be given permissions.
- 4. Select OK.

Supervisor displays the User Permissions Split/Skill Access window.

A User Permissions Split/Skill Access	x
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
User ID:	
Splits/Skills:	-
Read: 🗖	
Write:	
Exceptions:	
	acd6G3v3loop

- 5. In the **User ID:** field, enter the name of the user who will be assigned split/skill permissions.
- 6. In the **Splits/Skills:** field, enter the name or number of the split/skill for which the user will have permissions assigned.

This field can accept multiple splits/skills. Multiple entries must be separated by a semicolon (;).

Multiple splits/skills can be entered by using a range, for example, 1-256.

- 7. Place a check mark in the permissions that will be assigned to this user:
  - **Read:** User can view but not modify information for the specified splits/skills including reports.
  - Write: User can modify information on the specified splits/skills. This permission requires that the user also have the *read* permission.
  - Exceptions: User will receive notification of exceptions occurring on the specified splits/skills.

Only the split/skill exceptions made active through the **Exceptions** feature will provide notification to the user. See <u>Chapter 8: Administering exceptions</u> on page 305 for more information.

8. After assigning the necessary permissions, select **Actions > Add** from the menu bar.

The split/skill permissions for this user are saved.

It is possible to add permission definitions for multiple splits/skills at one time. To do so, enter multiple splits/skills in the **Splits/Skills:** field and separate them with semicolons (;).

### Viewing split/skill user permissions

This section provides the procedure for viewing the split/skill permissions definition for a *CMS* user.

#### Before you begin

The following items should be read and understood before viewing split/skill permission definitions for *CMS* users:

• The wildcard characters \* and ? cannot be used in the User Permissions Split/Skill Access window.

To view the split/skill permissions definition for a CMS user:

1. On the Controller window, select **Tools > User Permissions**.

Supervisor displays the User Permissions window.

👰 User Permissions		? ×
Operations Reports		
Operations:		
ACD Access		
Feature Access Main Menu Addition Access		
Split/Skill Access		
Trunk Group Access User Data		
Vector Access		
VDNAccess		
1		
ACD:		
Bison36vpe		<b>_</b>
Ibisonsovpe		
<u>S</u> cript		Help
	2	
	OK I	Cancel

- 2. In the **Operations:** list, highlight **Split/Skill Access**.
- 3. In the **ACD:** field, select the ACD or ACD Group containing the split/skill for which the user has a permissions definition.
- 4. Select OK.

Supervisor displays the User Permissions Split/Skill Access window.

😢 User Permissions Split/Skill Access	×
<u>Actions</u> <u>Edit</u> <u>H</u> elp	
User ID:	
Splits/Skills:	•
Read: 🔽	
Write:	
Exceptions:	
	acd6G3v3loop

- 5. In the **User ID:** field, enter the name of the user for which the split/skill permissions definition is to be viewed.
- 6. If the specific split/skill to view for this user is known, enter the name or number of the split/skill in the **Splits/Skills:** field. To have all splits/skills returned for this user ID, leave this field blank.

This field can accept multiple splits/skills. Multiple entries must be separated by a semicolon (;).

7. From the menu bar, select **Actions > Find one**.

*Supervisor* queries the database and displays the number of matches found for this user ID in the status bar.

### Listing all split/skill user permissions

This section provides the procedure for listing all of the user permission definitions for a split/skill.

#### Before you begin

The following items should be read and understood before listing all split/skill permission definitions for *CMS* users:

• The wildcard characters \* and ? cannot be used in the User Permissions Split/Skill Access window.

#### Steps

To list all user permission definitions for a split/skill:

1. On the Controller window, select **Tools** > **User Permissions**.

Supervisor displays the User Permissions window.

🚭 User Permissions		? ×
Operations Reports	Ì	
Operations:		
ACD Access		
Feature Access Main Menu Addition Access		
Split/Skill Access		
Trunk Group Access		
User Data		
Vector Access VDN Access		
ACD:		
Bison36vpe		•
Script		Help
	OK	Cancel

- 2. In the **Operations:** list, highlight **Split/Skill Access**.
- 3. In the **ACD:** field, select the ACD or ACD Group containing the split/skill for which all permission definitions will be shown.

4. Select OK.

Supervisor displays the User Permissions Split/Skill Access window.

🕸 User Permissions Split/Skill Access	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
User ID:	
Splits/Skills:	•
Read:	
Write:	
Exceptions:	
	acd6G3v3loop

5. From the menu bar, select Actions > List all.

*Supervisor* displays a secondary window listing all user permissions for splits/skills on the specified ACD.

A filter can be created when listing all user split/skill permission definitions. This filter is based on any information contained in the **User ID:** and **Splits/Skills:** fields on this dialog box when the **List all** action is performed.

For example, to view all of the user permission definitions for skill 26, enter **26** in the **Splits/Skills:** field before performing the **List all** action. This will cause only the user permission definitions for skill 26 to display. If more information is entered into the other fields of this dialog box, the results will be more restricted. If information for the user ID, splits/skills, and permissions are entered, the **List all** command will only return those permission definitions which match all of the information.

### Modifying split/skill user permissions

This section provides the procedure for modifying the split/skill permissions definition for a *CMS* user.

### Before you begin

The following items should be read and understood before modifying split/skill permissions:

- When the permissions definition for a user is modified, the change does not take effect until the user logs off and back on again.
- If a user does not have corresponding ACD permissions for the permissions set for them on the split/skill, *Supervisor* displays an error message.
- The wildcard characters \* and ? cannot be used in the User Permissions Split/Skill Access window.

To modify the split/skill permissions definition for a CMS user:

1. On the Controller window, select **Tools** > **User Permissions**.

Supervisor displays the User Permissions window.

User Permissions		? ×
Operations Reports	)	
Operations:		
ACD Access		
Feature Access Main Menu Addition Access		
Split/Skill Access		
Trunk Group Access		
User Data Vector Access		
VDN Access		
ACD:		
		— II
Bison36vpe		<u> </u>
Script		Help
	OK	Cancel

- 2. In the **Operations:** list, highlight **Split/Skill Access**.
- 3. In the **ACD:** field, select the ACD or ACD Group containing the split/skill for which the user has a permissions definition.
- 4. Select OK.

Supervisor displays the User Permissions Split/Skill Access window.

& User Permissions Split/Skill Access	×
Actions Edit Help	
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User ID:	
Splits/Skills:	- 🛃
Read:	
Write:	
Exceptions:	
	acd6G3v3loop

- 5. In the **User ID:** field, enter the name of the user for which the split/skill permissions definition is to be modified.
- 6. If the specific split/skill to view for this user is known, enter the name or number of the split/skill in the Splits/Skills: field. For all splits/skills to be returned for this user ID, leave this field blank.

This field can accept multiple splits/skills. Multiple entries must be separated by a semicolon (;).

7. From the menu bar, select **Actions > Find one**.

*Supervisor* queries the database and displays the number of matches found for this user ID in the status bar.

If multiple matches are found, use the **Next** and **Previous** items found under the **Action** menu to navigate to the correct split/skill.

- 8. Change the permissions for the user on this split/skill as needed:
  - Read: User can view but not modify information for the specified splits/skills including reports.
  - Write: User can modify information on the specified splits/skills. This permission requires that the user also have the *read* permission.
  - Exceptions: User will receive notification of exceptions occurring on the specified splits/skills.

### **A** Important:

If all permissions are to be removed for this user ID, it saves more server disk space to delete this permission definition rather than disabling all permissions. See <u>Deleting split/skill user permissions</u> on page 424 for more information.

Only the split/skill exceptions made active through the **Exceptions** feature will provide notification to the user. See <u>Chapter 8: Administering exceptions</u> on page 305 for more information.

 After the necessary permission changes have been completed, select Actions > Modify from the menu bar.

The permissions definition for this user ID and split/skill is updated. The status bar displays a **Successful** message.

### **Deleting split/skill user permissions**

This section provides the procedure for deleting the split/skill permissions definition for a *CMS* user.

To delete the split/skill permissions definition for a CMS user:

1. On the Controller window, select **Tools** > **User Permissions**.

Supervisor displays the User Permissions window.

User Permissions	、 、	?	×
Operations Reports	1		
Operations:			Ľ
ACD Access			L
Feature Access Main Menu Addition Access			L
Split/Skill Access			L
Trunk Group Access			L
User Data Vector Access			L
VDNAccess			L
			L
			L
			L
			L
ACD:			L
Bison36vpe		<b>•</b>	L
Script		Help	L
<u>o</u> onpe		<u> </u>	
	ОК	Cancel	

- 2. In the **Operations:** list, highlight **Split/Skill Access**.
- 3. In the **ACD**: field, select the ACD or ACD Group containing the split/skill for which the user has a permissions definition.
- 4. Select OK.

Supervisor displays the User Permissions Split/Skill Access window.

& User Permissions Split/Skill Access	×
Actions Edit Help	
User ID:	
Splits/Skills:	- 🛃
Read:	
Write:	
Exceptions:	
	acd6G3v3loop

- 5. In the **User ID:** field, enter the name of the user for which the split/skill permissions definition is to be deleted.
- 6. If the specific split/skill to view for this user is known, enter the name or number of the split/skill in the **Splits/Skills:** field. To return all split/skills for this user ID, leave this field blank.

7. From the menu bar, select **Actions > Find one**.

*Supervisor* queries the database and displays the number of matches found for this user ID in the status bar.

If multiple matches are found, use the **Next** and **Previous** items found under the **Action** menu to navigate to the correct split/skill.

8. From the menu bar, select **Actions > Delete**.

*Supervisor* deletes the permissions definition for this user ID and the associated split/ skill. The status bar displays a **Successful** message upon completion of the action.

This action does not delete the permission definitions for all splits/skills for this user, only the one displayed in the **Splits/Skills:** field.

# Trunk group access

Trunk group permissions allow users to view data for trunk group reports, view trunk group configuration information, and change trunk group configurations. The **User Permissions Trunk Group Access** window is also used to configure which users receive exception notifications.

This section contains the following topics:

- Before you begin on page 427
- Permissions on page 428
- Adding trunk group user permissions on page 428
- <u>Viewing trunk group user permissions</u> on page 430
- Listing all trunk group user permissions on page 432
- Modifying trunk group user permissions on page 433
- <u>Deleting trunk group user permissions</u> on page 435

### Before you begin

The following items should be read and understood before working with trunk group permissions:

- A CMS user ID must be created through the User Data feature before it can be assigned trunk group permissions.
- When a new user ID is created through the **User Data** feature, trunk group permission definitions for that user are not created. This is done to conserve disk space. When a trunk group permissions definition does not exist for a user ID, *CMS* will deny *read* and *write* access to trunk groups.
- A user ID must first have permissions for the ACD on which the trunk group resides before trunk group permissions can be assigned. If a user ID is assigned trunk group permissions and does not have the appropriate ACD permissions, *Supervisor* displays an error message.
- A user ID cannot be assigned the *write* permission without first having the *read* permission.
- Assigning only those permissions that are necessary for each user ID ensures the best system performance.

## Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view trunk group user permissions, the user ID used to log in to this *Supervisor* session requires *read* permission for the **User Permissions** subsystem.
- To add, delete, or modify trunk group user permissions, the user ID used to log in to this *Supervisor* session requires *write* permission for the **User Permissions** subsystem.

## Adding trunk group user permissions

This section provides the procedure for adding a trunk group permissions definition for a *CMS* user.

### Before you begin

The following items should be read and understood before adding a trunk group permissions definition for a *CMS* user:

- If a user does not have corresponding ACD permissions for the permissions set for them on the trunk group, *Supervisor* displays an error message.
- When the permissions definition for a user is created, the trunk group permissions do not take effect until the user logs off and back on again.

To add a trunk group permissions definition for a CMS user:

1. On the Controller window, select **Tools > User Permissions**.

Supervisor displays the User Permissions window.

🕸 User Permissions		? ×
Operations Reports	Ì	
Operations:		
ACD Access Feature Access		
Main Menu Addition Access		
Split/Skill Access		
Trunk Group Access User Data		
Vector Access		
VDNAccess		
1		
ACD:		
Bison36vpe		•
<u>S</u> cript		Help
	OK	Cancel

- 2. In the **Operations:** list, highlight **Trunk Group Access**.
- In the ACD: field, select the ACD containing the trunk group for which the user will be given permissions.
- 4. Select OK.

Supervisor displays the User Permissions Trunk Group Access window.

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<u>Actions</u> <u>E</u> dit <u>H</u> elp		
+ 2 9 /		
User ID:		
Trunk Groups:		▼ 🛃
Read	:	
Write	с <b>Г</b>	
Exce	ptions: 🗖	
		Bison36vpe

- 5. In the **User ID:** field, enter the name of the user who will be assigned trunk group permissions.
- 6. In the **Trunk Groups:** field, enter the name or number of the trunk group for which the user will have permissions assigned.

This field can accept multiple trunk groups. Multiple entries must be separated by a semicolon (;).

7. Place a check mark in the permissions that will be assigned to this user:

- **Read:** User can view but not modify information for the specified trunk groups including reports.
- Write: User can modify information on the specified trunk groups. This permission requires that the user also have the *read* permission.
- Exceptions: User will receive notification of exceptions occurring on the specified trunk groups.

Only the trunk group exceptions made active through the **Exceptions** feature will provide notification to the user. See <u>Chapter 8: Administering exceptions</u> on page 305 for more information.

8. After assigning the necessary permissions, select **Actions > Add** from the menu bar.

The trunk group permissions for this user are saved.

It is possible to add permission definitions for multiple trunk groups at one time. To do so, enter multiple trunk groups in the **Trunk Groups:** field and separate them with semicolons (;).

## Viewing trunk group user permissions

This section provides the procedure for viewing the trunk group permissions definition for a *CMS* user.

### Before you begin

The following items should be read and understood before viewing trunk group permission definitions for *CMS* users:

• The wildcard characters \* and ? cannot be used in the User Permissions Trunk Group Access window.

To view the trunk group permissions definition for a CMS user:

1. On the Controller window, select **Tools > User Permissions**.

Supervisor displays the User Permissions window.

User Permissions				? ×
Operations F	eports	)		
Operations:				
ACD Access Feature Access				
Main Menu Addition Access				
Split/Skill Access				
Trunk Group Access User Data				
Vector Access				
VDNAccess				
1				_
ACD:				
Bison36vpe			-	
Тризонзолье				
<u>S</u> cript			H	elp
		OK	Car	ncel

- 2. In the **Operations:** list, highlight **Trunk Group Access**.
- 3. In the **ACD**: field, select the ACD containing the trunk group for which the user has a permissions definition.
- 4. Select OK.

Supervisor displays the User Permissions Trunk Group Access window.

🙀 User Permissio	ns Trunk Group Access	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	0	
<b>₽</b> 🖉 🦉		
User ID:		
Trunk Groups:		•
	Read:	
	Write:	
	Exceptions:	
		Bison36vpe

- 5. In the **User ID:** field, enter the name of the user for which the trunk group permissions definition is to be viewed.
- 6. If the specific trunk group to view for this user is known, enter the name or number of the trunk group in the **Trunk Groups:** field. To have all trunk groups returned for this user ID, leave this field blank.

This field can accept multiple trunk groups. Multiple entries must be separated by a semicolon (;).

7. From the menu bar, select **Actions > Find one**.

The database is queried and the number of matches found for this user ID displays in the status bar.

# Listing all trunk group user permissions

This section provides the procedure for listing all of the user permission definitions for a trunk group.

#### Before you begin

The following items should be read and understood before listing all trunk group permission definitions for *CMS* users:

• The wildcard characters \* and ? cannot be used in the User Permissions Trunk Group Access window.

#### Steps

To list all user permission definitions for a trunk group:

1. On the Controller window, select **Tools > User Permissions**.

Supervisor displays the User Permissions window.

🚭 User Permissions		? ×
Operations Reports	Ì	
Operations:		
ACD Access		
Feature Access Main Menu Addition Access		
Split/Skill Access		
Trunk Group Access User Data		
Vector Access		
VDNAccess		
1		
ACD:		
Bison36vpe		•
Script		Help
	OK	Cancel

- 2. In the Operations: list, highlight Trunk Group Access.
- 3. In the **ACD:** field, select the ACD containing the trunk group for which all permission definitions will be shown.

#### 4. Select OK.

Supervisor displays the User Permissions Trunk Group Access window.

A User Permissions Trunk Group Access	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
User ID:	
Trunk Groups:	
Read:	
Write:	
Exceptions:	
	Bison36vpe

5. From the menu bar, select **Actions > List all**.

*Supervisor* displays a secondary window listing all user permissions for trunk groups on the specified ACD.

A filter can be created when listing all user trunk group permission definitions. This filter is based on any information contained in the **User ID:** and **Trunk Groups:** fields on this dialog box when the **List all** action is performed.

For example, to view all of the user permission definitions for trunk group 4, enter 4 in the **Trunk Groups:** field before performing the List all action. This will cause only the user permission definitions for trunk group 4 to display. If more information is entered into the other fields of this dialog box, the results will be more restricted. If information for the user ID, trunk groups, and permissions are entered, the **List all** command will only return those permission definitions which match all of the information.

# Modifying trunk group user permissions

This section provides the procedure for modifying the trunk group permissions definition for a *CMS* user.

#### Before you begin

The following items should be read and understood before modifying trunk group permissions:

- When the permissions definition for a user is modified, the change does not take effect until the user logs off and back on again.
- If a user does not have corresponding ACD permissions for the permissions set for them on the trunk group, *Supervisor* displays an error message.
- The wildcard characters \* and ? cannot be used in the User Permissions Trunk Group Access window.

To modify the trunk group permissions definition for a CMS user:

1. On the Controller window, select **Tools > User Permissions**.

Supervisor displays the User Permissions window.

🖗 User Permissions		? ×
Operations Reports		
Operations:		
ACD Access		
Feature Access Main Menu Addition Access		
Split/Skill Access		
Trunk Group Access		
User Data Vector Access		
VDNAccess		
1.00		
ACD:		
Bison36vpe		<u> </u>
Script		Help
	OK	Cancel
	<u></u>	

- 2. In the Operations: list, highlight Trunk Group Access.
- 3. In the **ACD:** field, select the ACD containing the trunk group for which the user has a permissions definition.
- 4. Select OK.

Supervisor displays the User Permissions Trunk Group Access window.

Arroup Access	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
User ID:	
Trunk Groups:	•
Read:	
Write:	
Exceptions:	
	Bison36vpe

- 5. In the **User ID:** field, enter the name of the user for which the trunk group permissions definition is to be modified.
- 6. If the specific trunk group to view for this user is known, enter the name or number of the trunk group in the **Trunk Groups:** field. To have all trunk groups returned for this user ID, leave this field blank.

This field can accept multiple trunk groups. Multiple entries must be separated by a semicolon (;).

7. From the menu bar, select **Actions > Find one**.

The database is queried and the number of matches found for this user ID displays in the status bar. The first match found populates the fields of this dialog box.

If multiple matches are found, use the **Next** and **Previous** items found under the **Action** menu to navigate to the correct trunk group.

- 8. Change the permissions for the user on this trunk group as needed:
  - **Read:** User can view but not modify information for the specified trunk groups including reports.
  - Write: User can modify information on the specified trunk groups. This permission requires that the user also have the *read* permission.
  - Exceptions: User will receive notification of exceptions occurring on the specified trunk groups.

#### Important:

If all permissions are to be removed for this user ID, it saves more server disk space to delete this permission definition rather than disabling all permissions.

Only the trunk group exceptions made active through the **Exceptions** feature will provide notification to the user. See <u>Chapter 8: Administering exceptions</u> on page 305 for more information.

 After the necessary permission changes have been completed, select Actions > Modify from the menu bar.

The permissions definition for this user ID and trunk group is updated. The status bar displays a **Successful** message upon completion.

### Deleting trunk group user permissions

This section provides the procedure for deleting the trunk group permissions definition for a *CMS* user.

To delete the trunk group permissions definition for a CMS user:

1. On the Controller window, select **Tools > User Permissions**.

Supervisor displays the User Permissions window.

🚱 User Permissions		? X
Operations Reports	)	,
Operations:		
ACD Access		
Feature Access Main Menu Addition Access		
Split/Skill Access		
Trunk Group Access User Data		
Vector Access		
VDNAccess		
1		
ACD:		
- Bison36vpe		<b>-</b>
<u>S</u> cript		<u>H</u> elp
	OK	Cancel

- 2. In the Operations: list, highlight Trunk Group Access.
- 3. In the **ACD:** field, select the ACD containing the trunk group for which the user has a permissions definition.
- 4. Select OK.

Supervisor displays the User Permissions Trunk Group Access window.

🖉 User Permissions Trunk Group Access	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
User ID:	
Trunk Groups:	- 🖪
Read:	
Write:	
Exceptions:	
	Bison36vpe

- 5. In the **User ID:** field, enter the name of the user for which the trunk group permissions definition is to be deleted.
- 6. If the specific trunk group to view for this user is known, enter the name or number of the trunk group in the **Trunk Groups:** field. To return all trunk groups for this user ID, leave this field blank.

7. From the menu bar, select **Actions > Find one**.

The database is queried and the number of matches found for this user ID displays in the status bar. The first match found populates the fields of this dialog box.

If multiple matches are found, use the **Next** and **Previous** items found under the **Action** menu to navigate to the correct trunk group.

8. From the menu bar, select **Actions > Delete**.

The permissions definition for this user ID and the associated trunk group is deleted. The status bar displays a **Successful** message upon completion of the action.

This action does not delete the permission definitions for all trunk groups for this user, only the one displayed in the **Trunk Groups:** field.

# **Vector access**

Vector permissions allow users to view data for vector reports, view vector configuration information, and change vector configurations. The **User Permissions Vector Access** window is also used to configure which users receive exception notifications.

This feature is not available if the *Vectoring* product has not been purchased and installed.

This section contains the following topics:

- Before you begin on page 438
- Permissions on page 439
- <u>Adding vector user permissions</u> on page 439
- <u>Viewing vector user permissions</u> on page 441
- Listing all vector user permissions on page 443
- Modifying vector user permissions on page 444
- <u>Deleting vector user permissions</u> on page 446

### Before you begin

The following items should be read and understood before working with vector permissions:

- A CMS user ID must be created through the User Data feature before it can be assigned vector permissions.
- When a new user ID is created through the **User Data** feature, vector permission definitions for that user are not created. This is done to conserve disk space. When a vector permissions definition does not exist for a user ID, *CMS* will deny *read* and *write* access to vectors.
- A user ID must first have permissions for the ACD on which the vector resides before vector permissions can be assigned. If a user ID is assigned vector permissions and does not have the appropriate ACD permissions, *Supervisor* displays an error message.
- A user ID cannot be assigned the *write* permission without first having the *read* permission.
- Assigning only those permissions that are necessary for each user ID ensures the best system performance.
- A user must be given the *exceptions* permission in order to be notified of vector exceptions that occur.

## Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view vector user permissions, the user ID used to log in to this *Supervisor* session requires *read* permission for the **User Permissions** subsystem.
- To add, delete, or modify vector user permissions, the user ID used to log in to this *Supervisor* session requires *write* permission for the **User Permissions** subsystem.

## Adding vector user permissions

This section provides the procedure for adding a vector permissions definition for a *CMS* user.

### Before you begin

The following items should be read and understood before adding a vector permissions definition for a *CMS* user:

- If a user does not have corresponding ACD permissions for the permissions set for them on the vector, *Supervisor* displays an error message.
- When the permissions definition for a user is created, the vector permissions do not take effect until the user logs off and back on again.

To add a vector permissions definition for a CMS user:

1. On the Controller window, select **Tools > User Permissions**.

Supervisor displays the User Permissions window.

👰 User Permissions		? ×
Operations Reports	)	
Operations:		
ACD Access Feature Access		
Main Menu Addition Access		
Split/Skill Access		
Trunk Group Access User Data		
Vector Access		
VDNAccess		
,		
ACD:		
Bison36vpe		<u> </u>
<u>S</u> cript		Help
	······	
	OK I	Cancel

- 2. In the **Operations:** list, highlight **Vector Access**.
- 3. In the **ACD:** field, select the ACD containing the vector for which the user will be given permissions.
- 4. Select OK.

Supervisor displays the User Permissions Vector Access window.

🖉 User Permissions Vector Access	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
User ID:	
Vectors:	- 1
Read:	
Write:	
Exceptions:	
	Bison36vpe

- 5. In the **User ID:** field, enter the name of the user who will be assigned vector permissions.
- 6. In the **Vectors:** field, enter the name or number of the vector for which the user will have permissions assigned.

This field can accept multiple vectors. Multiple entries must be separated by a semicolon (;).

7. Place a check mark in the permissions that will be assigned to this user:

- **Read:** User can view but not modify information for the specified vectors including reports.
- Write: User can modify information on the specified vectors. This permission requires that the user also have the *read* permission.
- Exceptions: User will receive notification of exceptions occurring on the specified vectors.

Only the vector exceptions made active through the **Exceptions** feature will provide notification to the user. See <u>Chapter 8: Administering exceptions</u> on page 305 for more information.

8. After assigning the necessary permissions, select **Actions > Add** from the menu bar.

The vector permissions for this user are saved.

It is possible to add permission definitions for multiple vectors at one time. To do so, enter multiple vectors in the **Vectors:** field and separate them with semicolons (r).

### Viewing vector user permissions

This section provides the procedure for viewing the vector permissions definition for a *CMS* user.

#### Before you begin

The following items should be read and understood before viewing vector permission definitions for *CMS* users:

• The wildcard characters \* and ? cannot be used in the User Permissions Vector Access window.

To view the vector permissions definition for a CMS user:

1. On the Controller window, select **Tools > User Permissions**.

Supervisor displays the User Permissions window.

🖗 User Permissions		? ×
Operations Reports	)	
Operations:		
ACD Access		
Feature Access Main Menu Addition Access		
Split/Skill Access		
Trunk Group Access User Data		
Vector Access		
VDNAccess		
1		
ACD:		
Bison36vpe		•
<u>S</u> cript		Help
	OK	Cancel

- 2. In the Operations: list, highlight Trunk Group Access.
- 3. In the **ACD:** field, select the ACD containing the vector for which the user has a permissions definition.
- 4. Select OK.

Supervisor displays the User Permissions Vector Access window.

& User Permissions Vector Access	X
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◆ Z \$ <b>/ \ /</b> E <b>1</b>	
User ID:	
Vectors:	•
Read:	
Write:	
Exceptions:	
	Bison36vpe

- 5. In the **User ID:** field, enter the name of the user for which the vector permissions definition is to be viewed.
- 6. If the specific vector to view for this user is known, enter the name or number of the vector in the **Vectors:** field. To have all vectors returned for this user ID, leave this field blank.

This field can accept multiple vectors. Multiple entries must be separated by a semicolon (;).

7. From the menu bar, select **Actions** > **Find one**.

The database is queried and the number of matches found for this user ID displays in the status bar.

### Listing all vector user permissions

This section provides the procedure for listing all of the user permission definitions for a vector.

#### Before you begin

The following items should be read and understood before listing all vector permission definitions for *CMS* users:

• The wildcard characters \* and ? cannot be used in the User Permissions Vector Access window.

#### Steps

To list all user permission definitions for a vector:

1. On the Controller window, select **Tools > User Permissions**.

Supervisor displays the User Permissions window.

🚭 User Permissions			? ×
Operations Re	ports		
Operations:			
ACD Access			
Feature Access Main Menu Addition Access			
Split/Skill Access			
Trunk Group Access			
User Data Vector Access			
VDNAccess			
ACD:			
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<u>S</u> cript			Help
<u>v</u> onp			Toth
	[	ĸ	Cancel
	š		

- 2. In the **Operations:** list, highlight **Vector Access**.
- In the ACD: field, select the ACD containing the vector for which all permission definitions will be shown.

4. Select OK.

Supervisor displays the User Permissions Vector Access window.

🖉 User Permissions Vector Access	×
Actions Edit Help	
User ID:	
Vectors:	- E
Read:	
Write:	
Exceptions:	
	Bison36vpe

5. From the menu bar, select Actions > List all.

*Supervisor* displays a secondary window listing all user permissions for vectors on the specified ACD.

A filter can be created when listing all user vector permission definitions. This filter is based on any information contained in the fields on this dialog box when the **List all** action is performed.

For example, to view all of the user permission definitions for vector 1, enter 1 in the **Vectors:** field before performing the **List all** action. This will cause only the user permission definitions for vector 1 to display. If more information is entered into the other fields of this dialog box, the results will be more restricted. If information for the user ID, vectors, and permissions are entered, the **List all** command will only return those permission definitions which match all of the information.

### Modifying vector user permissions

This section provides the procedure for modifying the vector permissions definition for a *CMS* user.

#### Before you begin

The following items should be read and understood before modifying vector permissions:

- When the permissions definition for a user is modified, the change does not take effect until the user logs off and back on again.
- If a user does not have corresponding ACD permissions for the permissions set for them on the vector, *Supervisor* displays an error message.
- The wildcard characters \* and ? cannot be used in the User Permissions Vector Access window.

To modify the vector permissions definition for a CMS user:

1. On the Controller window, select **Tools > User Permissions**.

Supervisor displays the User Permissions window.

User Permissions		? ×
Operations Reports	Ì	
Operations:		
ACD Access Feature Access		
Main Menu Addition Access		
Split/Skill Access		
Trunk Group Access User Data		
Vector Access		
VDNAccess		
1		_
ACD:		
Bison36vpe		•
<u>S</u> cript		Help
	OK	Cancel

- 2. In the **Operations:** list, highlight **Vector Access**.
- In the ACD: field, select the ACD containing the vector for which the user has a permissions definition.
- 4. Select OK.

Supervisor displays the User Permissions Vector Access window.

🖋 User Permissions Vector Access	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
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User ID:	
Vectors:	
Read: 🔽	
Write:	
Exceptions:	
	Bison36vpe

- 5. In the **User ID:** field, enter the name of the user for which the vector permissions definition is to be modified.
- If the specific vector to view for this user is known, enter the name or number of the vector in the Vectors: field. To have all vectors returned for this user ID, leave this field blank.

This field can accept multiple vectors. Multiple entries must be separated by a semicolon (;).

7. From the menu bar, select **Actions > Find one**.

The database is queried and the number of matches found for this user ID displays in the status bar. The first match found populates the fields of this dialog box.

If multiple matches are found, use the **Next** and **Previous** items found under the **Action** menu to navigate to the correct vector.

- 8. Change the permissions for the user on this vector as needed:
  - **Read:** User can view but not modify information for the specified vectors including reports.
  - Write: User can modify information on the specified vectors. This permission requires that the user also have the *read* permission.
  - Exceptions: User will receive notification of exceptions occurring on the specified vectors.

#### **A** Important:

If all permissions are to be removed for this user ID, it saves more server disk space to delete this permission definition rather than disabling all permissions.

Only the vector exceptions made active through the **Exceptions** feature will provide notification to the user. See <u>Chapter 8: Administering exceptions</u> on page 305 for more information.

 After the necessary permission changes have been completed, select Actions > Modify from the menu bar.

The permissions definition for this user ID and vector is updated. The status bar displays a **Successful** message upon completion.

### **Deleting vector user permissions**

This section provides the procedure for deleting the vector permissions definition for a *CMS* user.

To delete the vector permissions definition for a CMS user:

1. On the Controller window, select **Tools** > **User Permissions**.

Supervisor displays the User Permissions window.

User Permissions		? ×
Operations Reports	)	
Operations:		
ACD Access Feature Access		
Main Menu Addition Access		
Split/Skill Access		
Trunk Group Access User Data		
Vector Access		
VDN Access		
1		
ACD:		
Bison36vpe		•
<u>S</u> cript		Help
	ОК	Cancel

- 2. In the **Operations:** list, highlight **Vector Access**.
- 3. In the **ACD:** field, select the ACD containing the vector for which the user has a permissions definition.
- 4. Select OK.

Supervisor displays the User Permissions Vector Access window.

😢 User Permissions Vector Access	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
User ID:	
Vectors:	
Read: 🗖	
Write:	
Exceptions:	
	Bison36vpe

- 5. In the **User ID:** field, enter the name of the user for which the vector permissions definition is to be deleted.
- 6. If the specific vector to view for this user is known, enter the name or number of the vector in the **Vectors:** field. To return all vectors for this user ID, leave this field blank.

7. From the menu bar, select **Actions > Find one**.

The database is queried and the number of matches found for this user ID displays in the status bar. The first match found populates the fields of this dialog box.

If multiple matches are found, use the **Next** and **Previous** items found under the **Action** menu to navigate to the correct vector.

8. From the menu bar, select **Actions > Delete**.

The permissions definition for this user ID and the associated vector is deleted. The status bar displays a successful message upon completion of the action.

This action does not delete the permission definitions for all vectors for this user, only the one displayed in the **Vectors:** field.

# VDN access

Vector Directory Number (VDN) permissions allow users to view data for VDN reports, view VDN configuration information, and change VDN configurations. The **User Permissions VDN Access** window is also used to configure which users receive exception notifications.

This feature is not available if the Vectoring product has not been purchased, installed, and enabled on the corresponding ACD.

This section contains the following topics:

- Before you begin on page 449
- Permissions on page 450
- Adding VDN user permissions on page 450
- <u>Viewing VDN user permissions</u> on page 452
- Listing all vector user permissions on page 443
- Modifying vector user permissions on page 444
- <u>Deleting VDN user permissions</u> on page 457

### Before you begin

The following items should be read and understood before working with VDN permissions:

- A CMS user ID must be created through the User Data feature before it can be assigned VDN permissions.
- When a new user ID is created through the User Data feature, VDN permission definitions for that user are not created. This is done to conserve disk space. When a VDN permissions definition does not exist for a user ID, CMS denies read and write access to VDNs.
- A user ID must first have permissions for the ACD on which the VDN resides before VDN permissions can be assigned. If a user ID is assigned VDN permissions and does not have the appropriate ACD permissions, *Supervisor* an error message.
- A user ID cannot be assigned the *write* permission without first having the *read* permission.
- Assigning only those permissions that are necessary for each user ID ensures the best system performance.
- A user must be given the *exceptions* permission in order to be notified of VDN exceptions that occur.

## Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view VDN user permissions, the user ID used to log in to this *Supervisor* session requires *read* permission for the **User Permissions** subsystem.
- To add, delete, or modify VDN user permissions, the user ID used to log in to this *Supervisor* session requires *write* permission for the **User Permissions** subsystem.

# Adding VDN user permissions

This section provides the procedure for adding a VDN permissions definition for a *CMS* user.

### Before you begin

The following items should be read and understood before adding a VDN permissions definition for a *CMS* user:

- If a user does not have corresponding ACD permissions for the permissions set for them on the VDN, *Supervisor* displays an error message.
- When the permissions definition for a user is created, the VDN permissions do not take effect until the user logs off and back on again.

To add a VDN permissions definition for a CMS user:

1. On the Controller window, select **Tools > User Permissions**.

Supervisor displays the User Permissions window.

🖗 User Permissions		? ×
Operations Reports	)	
Operations:		
ACD Access Feature Access		
Main Menu Addition Access		
Split/Skill Access Trunk Group Access		
User Data		
Vector Access VDN Access		
VENACCESS		
ACD:		
Bison36vpe		<b>T</b>
		- II
<u>S</u> cript		Help
	OK	Cancel

- 2. In the Operations: list, highlight VDN Access.
- 3. In the **ACD:** field, select the ACD containing the VDN for which the user will be given permissions.
- 4. Select OK.

Supervisor displays the User Permissions VDN Access window.

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<u>Actions Edit Help</u>	
tes Made 1	
User ID: VDNS: Read:	
Head: I Write: T Exceptions: T	
	Los Angeles

- 5. In the **User ID:** field, enter the name of the user who will be assigned VDN permissions.
- 6. In the **VDNs:** field, enter the name or number of the VDN for which the user will have permissions assigned.

This field can accept multiple VDNs. Multiple entries must be separated by a semicolon (;).

7. Place a check mark in the permissions that will be assigned to this user:

- **Read:** User can view but not modify information for the specified VDNs including reports.
- Write: User can modify information on the specified VDNs. This permission requires that the user also have the *read* permission.
- Exceptions: User will receive notification of exceptions occurring on the specified VDNs.

Only the VDN exceptions made active through the **Exceptions** feature will provide notification to the user. See <u>Chapter 8: Administering exceptions</u> on page 305 for more information.

8. After assigning the necessary permissions, select **Actions > Add** from the menu bar.

The VDN permissions for this user are saved.

It is possible to add permission definitions for multiple VDNs at one time. To do so, enter multiple VDNs in the **VDNs**: field and separate them with semicolons (r).

## Viewing VDN user permissions

This section provides the procedure for viewing the VDN permissions definition for a *CMS* user.

#### Before you begin

The following items should be read and understood before viewing VDN permission definitions for *CMS* users:

• The wildcard characters \* and ? cannot be used in the User Permissions VDN Access window.

To view the VDN permissions definition for a CMS user:

1. On the Controller window, select **Tools** > **User Permissions**.

Supervisor displays the User Permissions window.

🖗 User Permissions		? ×
Operations Reports	Ì	
Operations:		
ACD Access Feature Access Main Menu Addition Access Split/Skill Access		
Trunk Group Access User Data Vector Access VDNAccess		
1		
ACD:		
Bison36vpe		<u> </u>
<u>S</u> cript		<u>H</u> elp
	OK	Cancel

- 2. In the **Operations:** list, highlight **Trunk Group Access**.
- 3. In the **ACD**: field, select the ACD containing the VDN for which the user has a permissions definition.
- 4. Select OK.

Supervisor displays the User Permissions VDN Access window.

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<u>Actions</u> <u>E</u> dit	<u>H</u> elp		
4Z§	<b>Made</b>	<b>A</b>	
User ID: VDNS:			
	Read: 🗌		
	Write: 🗌		
	Exceptions: 🗖		
			Los Angeles

- 5. In the **User ID:** field, enter the name of the user for which the VDN permissions definition is to be viewed.
- 6. If the specific VDN to view for this user is known, enter the name or number of the VDN in the **VDNs:** field. To have all VDNs returned for this user ID, leave this field blank.

This field can accept multiple VDNs. Multiple entries must be separated by a semicolon (;).

7. From the menu bar, select **Actions > Find one**.

The database is queried and the number of matches found for this user ID is displayed in the status bar.

# Listing all VDN user permissions

This section provides the procedure for listing all of the user permission definitions for a VDN.

#### Before you begin

The following items should be read and understood before listing all VDN permission definitions for *CMS* users:

• The wildcard characters \* and ? cannot be used in the User Permissions VDN Access window.

#### Steps

To list all user permission definitions for a VDN:

1. On the Controller window, select **Tools > User Permissions**.

Supervisor displays the User Permissions window.

🚱 User Permissions		? ×
Operations Reports	)	
Operations:		
ACD Access		
Feature Access Main Menu Addition Access		
Split/Skill Access		
Trunk Group Access		
User Data		
Vector Access VDN Access		
ACD:		
Bison36vpe		•
Script		Help
	OK	Cancel

- 2. In the **Operations:** list, highlight **VDN Access**.
- 3. In the **ACD:** field, select the ACD containing the VDN for which all permission definitions will be shown.

#### 4. Select OK.

Supervisor displays the User Permissions VDN Access window.

🕅 User Permissions VDN Access	
<u>Actions Edit H</u> elp	
tes some 1	
User ID:	
VDNS:	
Read:	
Write:	
Exceptions:	
	Los Angeles

5. From the menu bar, select Actions > List all.

*Supervisor* displays a secondary window listing all user permissions for VDNs on the specified ACD.

A filter can be created when listing all user VDN permission definitions. This filter is based on any information contained in the **User ID:** and **VDNs:** fields on this dialog box when the **List all** action is performed.

For example, to view all of the user permission definitions for VDN 10, enter **10** in the **VDNs:** field before performing the **List all** action. This will cause only the user permission definitions for VDN 10 to display. If more information is entered into the other fields of this dialog box, the results will be more restricted. If information for the user ID, VDNs, and permissions are entered, the **List all** command will only return those permission definitions which match all of the information.

### Modifying VDN user permissions

This section provides the procedure for modifying the VDN permissions definition for a *CMS* user.

This feature is available if the following items are true:

- The Vectoring feature has been purchased and installed.
- VDN permission checking is enabled.

#### Before you begin

The following items should be read and understood before modifying VDN permissions:

- When the permissions definition for a user is modified, the change does not take effect until the user logs off and back on again.
- If a user does not have corresponding ACD permissions for the permissions set for them on the VDN, Supervisor displays an error message.

• The wildcard characters \* and ? cannot be used in the User Permissions VDN Access window.

#### **Steps**

To modify the VDN permissions definition for a CMS user:

1. On the Controller window, select **Tools > User Permissions**.

Supervisor displays the User Permissions window.

🚱 User Permissions	? ×
Operations Reports	) .
Operations:	
ACD Access Feature Access	
Main Menu Addition Access	
Split/Skill Access Trunk Group Access	
User Data Vector Access	
VDNAccess	
1	
ACD:	
Bison36vpe	<u> </u>
<u>S</u> cript	Help
OK	Cancel

- 2. In the **Operations:** list, highlight **VDN Access**.
- 3. In the **ACD:** field, select the ACD containing the VDN for which the user has a permissions definition.
- 4. Select OK.

Supervisor displays the User Permissions VDN Access window.

User Permissions VDN Access	
<u>Actions Edit H</u> elp	
4ZS Mare 1	
User ID: VDNS: Read: Write: Exceptions:	¥ []4
	Los Angeles

5. In the **User ID:** field, enter the name of the user for which the VDN permissions definition is to be modified.

6. If the specific VDN to view for this user is known, enter the name or number of the VDN in the **VDNs:** field. To have all VDNs returned for this user ID, leave this field blank.

This field can accept multiple VDNs. Multiple entries must be separated by a semicolon (;).

7. From the menu bar, select **Actions > Find one**.

The database is queried and the number of matches found for this user ID displays in the status bar. The first match found populates the fields of this dialog box.

If multiple matches are found, use the **Next** and **Previous** items found under the **Action** menu to navigate to the correct VDN.

- 8. Change the permissions for the user on this VDN as needed:
  - Read: User can view but not modify information for the specified VDNs including reports.
  - Write: User can modify information on the specified VDNs. This permission requires that the user also have the *read* permission.
  - Exceptions: User will receive notification of exceptions occurring on the specified VDNs.

### Important:

If all permissions are to be removed for this user ID, it saves more server disk space to delete this permission definition rather than disabling all permissions.

Only the VDN exceptions made active through the **Exceptions** feature will provide notification to the user. See <u>Chapter 8: Administering exceptions</u> on page 305 for more information.

 After the necessary permission changes have been completed, select Actions > Modify from the menu bar.

The permissions definition for this user ID and VDN is updated. The status bar displays a **Successful** message upon completion.

### **Deleting VDN user permissions**

This section provides the procedure for deleting the VDN permissions definition for a *CMS* user.

To delete the VDN permissions definition for a CMS user:

1. On the Controller window, select **Tools > User Permissions**.

Supervisor displays the User Permissions window.

🚱 User Permissions		? ×
Operations Reports		
Operations:		
ACD Access		
Feature Access Main Menu Addition Access		
Split/Skill Access		
Trunk Group Access User Data		
Vector Access		
VDNAccess		
ACD:		
Bison36vpe		<u> </u>
<u>S</u> cript		<u>H</u> elp
	· · · · · · · · · · · · · · · · · · ·	
	OK	Cancel

- 2. In the **Operations:** list, highlight **VDN Access**.
- 3. In the **ACD:** field, select the ACD containing the VDN for which the user has a permissions definition.
- 4. Select OK.

Supervisor displays the User Permissions VDN Access window.

User Permissions VDN Access	_ 🗆 ×
<u>Actions E</u> dit <u>H</u> elp	
tes Made 1	
User ID:	
Read:  Write:  Exceptions:	
	Los Angeles

- 5. In the **User ID:** field, enter the name of the user for which the VDN permissions definition is to be deleted.
- 6. If the specific VDN to view for this user is known, enter the name or number of the VDN in the **VDNs:** field. To return all VDNs for this user ID, leave this field blank.

7. From the menu bar, select **Actions > Find one**.

The database is queried and the number of matches found for this user ID displays in the status bar. The first match found populates the fields of this dialog box.

If multiple matches are found, use the **Next** and **Previous** items found under the **Action** menu to navigate to the correct VDN.

8. From the menu bar, select **Actions > Delete**.

The permissions definition for this user ID and the associated VDN is deleted. The status bar displays a **Successful** message upon completion of the action.

This action does not delete the permission definitions for all VDN for this user, only the one displayed in the **VDNs:** field.

Administering user permissions

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# Chapter 10: Configuring CMS system settings

This section provides procedures on viewing and changing the setup of the *CMS* system configured during the initial installation. These configuration values are used in adjusting the state of the system and the collection, storage, and retrieval of data. Making changes to these configuration settings can affect system performance, disk space usage, and data collection.

This section contains the following topics:

- Before you begin on page 461
- <u>CMS state</u> on page 462
- <u>Data collection</u> on page 466
- Data Storage Allocation on page 469
- <u>Data summarizing</u> on page 478
- External Application Status on page 481
- Free Space Allocation on page 487
- Migrating CMS data on page 495
- <u>Pseudo-ACDs</u> on page 500
- <u>Storage intervals</u> on page 508
- <u>Switch setup</u> on page 518

# Before you begin

If an ACD Group is selected as the current ACD in the **System Setup** window, only those operations that are valid for the ACD Group will appear in the **Operations:** list.

# **CMS** state

CMS can run in two operational states:

- Multi-user mode Any defined user can log on to CMS.
- Single-user mode Only one user can be logged on to the CMS server at a time.

The single-user mode is necessary when changes must be made to the following systems and procedures:

- Change Master ACD
- Data storage allocation
- Storage intervals
- Restore specific types of data
- Migrate specific types of data

The **CMS State** window can be used to select which ACD serves as the master for time synchronization. The time displayed on the Controller window originates from the master ACD.

This section contains the following topics:

- Before you begin on page 462
- Permissions on page 463
- Changing the CMS state on page 463
- Changing the master ACD on page 464

### Before you begin

The following items should be read and understood before changing the CMS state:

- *Viewing* data in the **Data Storage Allocation**, **Storage Intervals**, and **Restore Data** windows can be done through both the multi-user and single-user modes.
- To add to or modify configuration settings for the **Data Storage Allocation**, **Storage Intervals**, or **Restore Data** windows requires that the *CMS* state is set to single-user mode.
- If a log out is performed while *CMS* is still in the single-user state, at least ten seconds must pass before a logon can be performed.
- When in single-user mode, *CMS* continues to collect data for all ACDs with the data collection feature enabled.

## Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view the CMS state or the master ACD, the user ID used to log on to this Supervisor session requires read permission for the CMS System Setup feature.
- To modify the *CMS* state or the master ACD, the user ID used to log on to this *Supervisor* session requires *write* permission for the **CMS System Setup** feature.

## Changing the CMS state

This section provides the procedure for changing the state of the *CMS* system to single-user or multi-user mode.

#### Steps

To change the current CMS state:

1. From the Controller window, select Tools > System Setup....

Supervisor displays the CMS System Setup window.

CMS System Setup				? ×
Operations Repo	orts	Ì		
Operations:				
CMS State				▲
Data Collection Data Storage Allocation				
Data Summarizing				
External Application Status				
Free Space Allocation				
Load Pseudo-ACD Data Pseudo-ACD Setup				-1
JEseudo-ACD Setup				
ACD:				
test			-	
Tiest				
Script			<u>H</u> elp	
	[	OK	Cancel	
	š			

2. In the Operations: list, highlight CMS State.

3. Select OK.

Supervisor displays the CMS State window.

🕅 CMS State	
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
CMS user mode:	
O Single-user mode	
Multi-user mode	
Master ACD for clock synchronization: 2	•

- 4. Under CMS user mode:, select one of the following options:
  - **Single-user mode** Specifies that the CMS state is being set to single-user mode. When *CMS* is set to single-user mode, a message box displays to all users indicating that *CMS* will be brought down in one minute. Users are automatically logged off after one minute.
  - Multi-user mode Specifies that the CMS state is being set to allow multiple users to log on to CMS
- 5. After selecting the CMS user mode, select Actions > Modify from the menu bar.

If the *CMS* user mode is set to single-user, all *CMS* users are notified to log off. If the *CMS* user mode is set to multi-user, *CMS* users can again log on to the system.

## Changing the master ACD

This section provides the procedure for selecting the master ACD which will be used for time synchronization.

#### Steps



Changing the master ACD requires that you turn data collection off.

To select the ACD which will serve as the master for time synchronization:

1. From the Controller window, select **Tools > System Setup...**.

Supervisor displays the CMS System Setup window.

CMS System Setup		? >
Operations Reports	Ì	
Operations:		
CMS State		▲ I
Data Collection		
Data Storage Allocation Data Summarizing		
External Application Status		
Free Space Allocation		
Load Pseudo-ACD Data		
Pseudo-ACD Setup		<b>_</b>
ACD:		
test		-
,		
<u>S</u> cript		Help

- 2. In the **Operations:** list, highlight **CMS State**.
- 3. Select OK.

Supervisor displays the CMS State window.

🕅 CMS State	
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
<b>1</b>	
CMS user mode:	
<ul> <li>Single-user mode</li> <li>Multi-user mode</li> </ul>	
Master ACD for clock synchronization:	2

- 4. In the **Master ACD for clock synchronization:** field, select the ACD that will serve as the master for the synchronization of time for *CMS*.
- 5. After selecting the master ACD, select **Actions > Modify** from the menu bar.

The selected ACD is set as the master for time synchronization and the status bar displays a **Successful** message.

# **Data collection**

The **Data Collection** window is used to enable and disable the storing of data for real ACDs. When data collection is disabled, no contact center data is recorded during the current interval. Also, reports run to include this time period will not accurately reflect the activities in the contact center.

This section contains the following topic:

- Before you begin on page 466
- Permissions on page 467
- Changing the data collection state on page 467

## Before you begin

The following items should be read and understood before working with the data collection feature:

- When data collection is enabled, the connection status of the link should be monitored to ensure data is being transferred. Use the **Connection Status** feature in the **Maintenance** subsystem to view this information.
- The data collection feature does not apply for pseudo-ACDs as they do not collect data.
- When changing the data collection status, each ACD must be administered separately.
- Data collection must be disabled when making changes to the following features:
  - Data Storage Allocation
  - Storage Intervals
  - Change Master ACD
  - Restore specific types of data
  - Migrate specific types of data

Viewing data through the features listed above can be done with data collection enabled.

- Data collection must be enabled for the current ACD in order to activate an agent trace or do any switch administration from *CMS*.
- When data collection is disabled, no new data is collected. If calls are in the system, the data they generate is not recorded in *CMS*. If data collection is to be disabled, it is best to wait for the current interval to be archived so that data loss is minimized.

## Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view **Data Collection** settings, the user ID used to log on to this *Supervisor* session requires *read* permission for the **CMS System Setup** feature.
- To modify the **Data Collection** settings, the user ID used to log on to this *Supervisor* session requires *write* permission for the **CMS System Setup** feature.

# Changing the data collection state

This section provides the procedure for enabling or disabling data collection for an ACD.

### Steps

1. On the Controller window, select **Tools > System Setup...**.

Supervisor displays the CMS System Setup window.

🕼 CMS System Setup		? ×
Operations Reports	Ì	
Operations:		
CMS State		<b>_</b>
Data Collection Data Storage Allocation		
Data Summarizing		
External Application Status		
Free Space Allocation Load Pseudo-ACD Data		
Pseudo-ACD Setup		<b>-</b>
,		
ACD:		
test		<u>-</u>
Script		Help
<u></u>		
	OK I	Cancel
		Cancer

2. In the **Operations:** list, highlight **Data Collection**.

3. Select OK.

Supervisor displays the Data Collection window.

Data Collection	×
Actions <u>E</u> dit <u>H</u> elp	
ACD: Bison36vpe	
Data collection:	
🖲 On	
O Off	

- 4. In the ACD: field, select the ACD which will have data collection turned on or off.
- 5. Under Data collection:, select one of the following options:
  - On: Enables data collection for the selected ACD.
  - Off: Disables data collection for the selected ACD.

# **Data Storage Allocation**

The **Data Storage Allocation** window is used to specify the amount of historical data saved by *CMS* and the duration for which it is saved. The amount of data saved and the duration for which it is saved affects disk space on the server and is limited by the configuration of the system. Data storage parameters are initially set during installation.

This section contains the following topics:

- Before you begin on page 469
- Permissions on page 470
- Viewing Data Storage Allocation on page 470
- Modifying Data Storage Allocation on page 472

## Before you begin

The following items should be read and understood before working with **Data Storage Allocation**:

- A full maintenance backup should be performed before changing the **Data Storage Allocation** configuration.
- If changes to the Communication Manager system are made through the swsetup command on the CMS console, the settings for Data Storage Allocation should be checked to ensure that storage is set for any new or modified entities. For example, enable the Call Vectoring feature requires data storage space for VDNs and vectors. Changing the release of the Communication Manager system may change the number of measured entities allowed and affect the storage allocation for each entity.
- Disable data collection for all real ACDs before making modifications through **Data Storage Allocation**.
- Set the *CMS* state to single-user mode before making modifications through **Data Storage Allocation**.
- When determining the amount of storage space needed, remember that future growth of items, such as trunk groups or splits/skills, need to be taken into account.
- For reference, print out the **Data Storage Allocation** window before modifications are made.
- If a Data Storage Allocation window is modifying data, do not open a second Data Storage Allocation window. Wait for the first window to finish the modifications as performing simultaneous modifications through two Data Storage Allocation windows can result in damage to data tables.

- Activating a feature such as vectoring requires not only changing switch parameters but also requires the allocation of space for VDNs and vectors which did not have space previously allocated.
- The amount of free space available on the server limits the maximum amount of storage space usable through **Data Storage Allocation**. Use the **Free Space Allocation** window to view the utilization of disk space before making changes to **Data Storage Allocation**. If changes are made to the **Data Storage Allocation** settings, you must run **Free Space Allocation** so that the disk space is properly adjusted.
- The length of the intrahour interval affects the amount of disk space required to store intrahour data. For example, an intrahour interval of 30 minutes requires twice the amount of disk space than an intrahour interval of 60 minutes.
- If the Call Vectoring feature has not been purchased and installed, the fields corresponding to call work codes, vectors, and VDNs are not displayed.
- The data storage values determine how much data is available for running historical reports. For example, if weekly and monthly data is not saved, weekly or monthly reports display no data.
- Disk space affects the amount of historical data that can be stored. The following list provides the maximum durations possible when storing historical data:
  - Intrahour 62 days
  - Daily 1825 days (5 years)
  - Weekly 520 weeks (10 years)
  - Monthly 120 months (10 years)

## **Permissions**

Depending on the procedure that you want to perform, you need the following permissions:

- To view **Data Storage Allocation** settings, the user ID used to log on to this *Supervisor* session requires *read* permission for the **CMS System Setup** feature.
- To modify **Data Storage Allocation** settings, the user ID used to log on to this *Supervisor* session requires *write* permission for the **CMS System Setup** feature.

# Viewing Data Storage Allocation

This section provides the procedure for viewing the **Data Storage Allocation** parameters.

#### Steps

From the Controller window, select Tools > System Setup....
 Supervisor displays the CMS System Setup window.

CMS System Setup				Y D
Operations Report	8	1		
Operations:				
CMS State				•
Data Collection Data Storage Allocation				
Data Summarizing				
External Application Status				
Free Space Allocation				
Load Pseudo-ACD Data				-1
Pseudo-ACD Setup				
ACD:				
-			_	
test			<b>-</b>	
Script			Help	
	· · · · · · · · · · · · · · · · · · ·	<u> </u>	Cancel	- 1
		пк 🎚		

- 2. In the **Operations:** list, highlight **Data Storage Allocation**.
- 3. In the **ACD:** field, select the ACD for which the data storage settings will be viewed.

#### 4. Select OK.

Supervisor displays the Data Storage Allocation window.

🕅 Data Storage Allocation						
<u>Actions</u> <u>E</u> dit <u>H</u> elp						
Warning: Print a copy of this w	vindow prior	to modifying				
Data Item:	# of Items	Days of Intrahour	Days of Daily	Weeks of Weekly	Months of Monthly	
Splits/Skills (0-100)	100	31	387	53	13	
Agents		31	387	53	13	
Trunk groups (0-395)	100	31	387	53	13	
Trunks (0-17050)	400	31	387	53	13	
Call work codes (1-1689)	150	0	0	0	0	
Vectors (0-999)	50	31	387	53	13	
VDNs (0-600)	50	31	387	53	13	
Shift 1 Times: 8:00 AM /	5:00 PM	Maximum ager	nts logged in:	600		
Shift 2 Times: /		Maximum ager	nts logged in:			
Shift 3 Times: /		Maximum ager	nts logged in:			
Shift 4 Times: /		Maximum ager	nts logged in:			
Total split/skill members, sumr	ned over all	splits/skills(0-5	700): 600			
Number of agent login/logout	records (0-9	<b>69999):</b> 10	0000			
Number of agent trace records	(0- <b>47000</b> 0)	): 10000	_			
Number of unmeasured trunk facilities: 150						
Number of exception records (	0-1250):	250				
Number of call records (0-500	<b>0):</b> 0					
					ST10	

## **Modifying Data Storage Allocation**

This section provides the definitions of the fields displayed in the **Data Storage Allocation** window and suggestions for determining the necessary values. The data storage configuration is performed on a per-ACD basis. In a multi-ACD environment, data storage allocation should not be set too high as it can exceed disk capacity for storing information for the other ACDs.

#### Before you begin

Before modifying the configuration of the **Data Storage Allocation** window, the following must occur:

- Data collection for all real ACDs must be disabled.
- The CMS state must be set to single-user mode.

• A full maintenance backup should be performed before changing the **Data Storage Allocation** configuration.

Data storage allocation needs vary among installations. Base your *CMS* data storage needs on these criteria:

- The available disk space on your CMS system
- The number of real and pseudo-ACDs on the CMS system
- The size of the real ACDs and all pseudo-ACDs, such as number of agents, trunks, and so forth.
- The length of time for data to be stored. For example, 30 days versus 100 days versus two years.

#### Fields

The following table lists the fields found on the **Data Storage Allocation** window.

🔯 Data Storage Allocation								
<u>Actions</u> <u>E</u> dit <u>H</u> elp								
<b>Z A</b>								
Warning: Print a copy of this window prior to modifying								
Data Item: Splits/Skills (0-100)	# of Items	Days of Intrahour 31	Days of Daily 387	Weeks of Weekly 53	Months of Monthly			
Agents	,	31	387	53	13			
Trunk groups (0-395)	100	31	387	53	13			
Trunks (0-17050)	400	31	387	53	13			
Call work codes (1-1689)	150	0	0	0	0			
Vectors (0-999)	50	31	387	53	13			
VDNs (0-600)	50	31	387	53	13			
Shift 1 Times: 8:00 AM /	5:00 PM	Maximum ager	nts logged in:	600				
Shift 2 Times: /		Maximum ager	nts logged in:					
Shift 3 Times: /		Maximum agei	nts logged in:					
Shift 4 Times: /		Maximum ager	nts logged in:					
Total split/skill members, sum	ned over all	splits/skills(0-5	5 <b>700):</b> [600					
Number of agent login/logout	records (0-9	69999): 1	0000					
Number of agent trace records (0-470000): 10000								
Number of unmeasured trunk facilities: 150								
Number of exception records (0-1250): 250								
Number of call records (0-500	<b>0):</b> 0							
					ST10			

Field	Description
Data Item	Lists the maximum number of splits/skills, trunk groups, trunks, call work codes, vectors, and VDNs allowed for the system.
# of Items	The number of splits/skills, trunk groups, trunks, call work codes, vectors, and VDNs for which data storage space should be allocated. When this window is initially displayed, these fields display the number of currently administered data items. These numbers should include expected growth. For example, a 30 in this field for <b>Splits/Skills</b> indicates that storage space is allocated for 30 splits/skills. The system may have only 25 splits/skills in existence, but this number allows for future growth.
Days of Intrahour	The number of days where the system stores intrahour data for splits/ skills, agents, trunk groups, trunks, call work codes, vectors, and VDNs. Each entity can have a different number of days associated with it. A 0 (zero) in this field causes the system to discard intrahour data which also means that no daily, weekly, or monthly data can be collected. When data collection reaches the end of the length of time specified, the data is combined, archived, and appended into daily information.

Field	Description
Days of Daily	The number of days for which the system stores daily data for splits/ skills, agents, trunk groups, trunks, call work codes, vectors, and VDNs. Each entity can have a different number of days associated with it. A 0 (zero) in this field causes the system to discard daily data which also means that no daily or weekly data can be collected. When data collection reaches the end of the length of time specified, the data is combined, archived, and appended into weekly information.
Weeks of Weekly	The number of weeks for which the system stores weekly data for splits/ skills, agents, trunk groups, trunks, call work codes, vectors, and VDNs. Each entity can have a different number of weeks associated with it. A 0 (zero) in this field causes the system to discard weekly data. When data collection reaches the end of the length of time specified, the data is combined, archived, and appended into monthly information.
Months of Monthly	The number of months for which the system stores monthly data for splits/skills, agents, trunk groups, trunks, call work codes, vectors, and VDNs. Each entity can have a different number of months associated with it. A 0 (zero) in this field causes the system to discard monthly data. When data collection reaches the end of the length of time specified, the data is deleted.
Shift <i>n</i> times (1, 2, 3, or 4)	The shift start and stop times for each shift of agents (up to four shifts) for the specified ACD. This information is used to calculate the amount of space to be reserved for this historical agent table. Shifts may overlap. If you specify a shift that starts before the data collection start time or ends after the data collection stop time, you receive an error message. The data collection start and stop times are found in the <b>Storage Intervals</b> window in <b>System Setup</b> . <i>CMS</i> rounds shift times to the nearest interval. For example, if you use 30-minute intervals and specify a shift from 8:15 to 5:15, <i>CMS</i> assumes that this shift is from 8:00 to 5:30. Shift must be at least one minute in length. Specify 24-hour shifts according to the following example: 8:00AM to 7:59AM This information is used throughout <i>CMS</i> .
Maximum agents logged in	The maximum number of agents logged in during the shift

Field	Description
Total split/skill members, summed over all splits/skills	The maximum number of agents or extensions across all splits/skills that are measured or logged in at any one time. This number should include those agents or extensions that are members of multiple splits/skills. For this field, each split/skill the agent belongs to counts as a split/skill member. Using this method of determining members results in a higher number than the number of agents. For Communication Manager systems without Expert Agent Selection (EAS), this value represents the maximum number of administered split members. For Communication Manager systems with EAS, this value represents the maximum agent/skill pairs (skill members) that are logged in.
Number of agent login/ logout records	The number of agent login/logout records stored by the system. Each time an agent logs in, the system creates a login/logout record. The subsequent logout of the agent also uses this same record. If, at a later time, the agent logs in again, another login/logout record is created. The following equation demonstrates how this number is calculated: (Number of agents) x (Number of times each agent logs in each day) = Number of agent login/logout records If there are 200 agents and each agent logs in three times per day, using the equation above would result in 600 agent login/logout records for this field. When skills for an agent are changed, a new login/logout record is generated if the agent is currently logged in to the system.
Number of agent trace records	The number of agent trace records for the currently specified ACD. This number is not representative of all ACDs.
Number of unmeasured trunk facilities	<ul> <li>The number of trunks not measured by the <i>CMS</i> system.</li> <li>An unmeasured trunk facilities are used for: <ul> <li>Internal calls (intraswitch) to a measured split or agent</li> <li>Internal calls to VDNs</li> <li>Calls made by agents to internal destinations or using a trunk group that is not measured</li> <li>Transfers and conferences until the transfer/conference is complete This number should be set high enough to handle the traffic expected over these unmeasured trunks, but cannot exceed the maximum number of trunks minus the number of measured trunks. The default value for this field is 300.</li> </ul> </li> </ul>

Field	Description
Number of exception records	The total number of exceptions stored for <i>CMS</i> . This total is for each type of exception, such as agents, splits/skills, VDNs, and so forth.
Number of call records	The number of call records the system stores for a selected ACD. Using the <i>CMS</i> server for storage and analysis allows a maximum of <b>5000</b> records. If the Avaya CMS External Call History product has been purchased and installed, another computer can be used for storage and analysis of the call records. This field then represents the amount of buffer space set aside on the <i>CMS</i> server that is used to collect the call records prior to transmission to the other system. The maximum value for this field using this configuration is <b>999999</b> across all ACDs.

# Data summarizing

Data is automatically archived based on the entries in the **Storage Intervals** window. The **Data Summarizing** window is used to manually archive data in the daily, weekly, and monthly tables of the historical database.

This section contains the following topic:

- Before you begin on page 478
- Permissions on page 479
- Archiving data on page 479

# Before you begin

The following items should be read and understood before working with the **Data Summarizing** window:

### **A** Important:

Since data is automatically archived based on the entries in the **Storage Intervals** window, this tool *must not* be used unless an archive failed or did not occur.

- Using the Data Summarizing window causes the archiving to happen immediately.
- Multiple data summarizing requests are queued and are run in the order requested.
- Automatic daily, weekly, and monthly data summaries are queued along with manual requests so that just one type of data summarizing occurs at a time.
- Adequate storage space must be made available through the **Data Storage Allocation** window before archiving can occur.
- A manual archive cannot be performed unless data exists in the daily, weekly, or monthly tables. If a day of data is missing within the period you are attempting to manually archive, the archive will fail.
- Results of daily, weekly, and monthly archives can be viewed through the Error Log Report or the **Archiving Status** window.
- If *CMS* is not operational when an automatic archive should occur, an error message is logged which indicates that a manual archive should be performed using the **Data Summarizing** window.
- If an incomplete week or month is specified as a date, data summarizing will not occur. Partial weekly or monthly data cannot be summarized.

• For example, if a week is configured in the **Storage Intervals** window as being Monday through Friday, entering a date which falls on Saturday in the **Data Summarizing** window results in the week previous to the date specified being archived.

## Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view the **Data Summarizing** window, the user ID used to log in to this *Supervisor* session requires *read* permission for the **CMS System Setup** feature.
- To use the **Data Summarizing** window to perform an archive of the system, the user ID used to log in to this *Supervisor* session requires *write* permission for the **CMS System Setup** feature.

## **Archiving data**

This section provides the procedure for manually archiving data using the **Data Summarizing** window.

#### Steps

To archive data with the Data Summarizing window:

- 1. From the Controller window, select Tools > System Setup....
  - Supervisor displays the CMS System Setup window.

CMS System Setup		?
Operations Report:	]	
Operations:		
CMS State		<b>▲</b>
Data Collection Data Storage Allocation		
Data Summarizing		
External Application Status		
Free Space Allocation Load Pseudo-ACD Data		
Pseudo-ACD Setup		<b>_</b>
ACD:		
test	•	
Script		Help
<u>S</u> cript		<u>H</u> elp

2. In the **Operations:** list, highlight **Data Summarizing**.

3. Select OK.

Supervisor displays the Data Summarizing window.

🕅 Data Summarizing 🛛 🕅
Actions Edit Help
₩ <u></u>
ACD: Bison36vpe
Data type:
Daily
O Weekly
C Monthly
Date:

- 4. In the ACD: field, select the ACD for which data will be archived.
- 5. In the **Data type:** field, select the appropriate option:
  - **Daily** Archives data for one day. A daily summary archives a partial day. Daily summaries must be complete for each day of the week or month before *CMS* archives the data for that week or month
  - Weekly Archives data for one week. A weekly summary must be requested by entering a date that falls within a completed predefined week. See the weekly configuration in the Storage Intervals window.
  - **Monthly** Archives data for one month. Set any day during the month in a completed month for which monthly data should be summarized.
- 6. From the menu bar, select **Actions** > **Run**.

*Supervisor* displays a warning message stating that data archiving is a lengthy process and cannot be cancelled. Through this window, it is possible to cancel the data archive, otherwise the process continues when the message box is dismissed.

Archiver started displays on the status line for the first request and Archiver request submitted displays if a data summary is currently in progress.

# **External Application Status**

The **External Application Status** feature, a separately purchased option for *CMS*, sends real-time data to an external device or to an external program.

The types of external devices or programs used with the **External Application Status** feature can consist of the following:

- A wallboard This is a large display placed in a contact center where all agents can view data. This data can consist of the number of calls in the queue, calls being handled by different splits/skills, and other information.
- An employee scheduler program This third-party software is used to compare the start and end times for agents with schedules created by management.
- A contact center data consolidation program This third-party software is used to collect data from all contact centers for reporting purposes.

This section contains the following topics:

- Before you begin on page 481
- Permissions on page 481
- Enabling or disabling the External Application Status feature on page 482
- Viewing the states of external applications on page 483
- <u>Starting or stopping external applications</u> on page 484

## Before you begin

The following items should be read and understood before working with the **External Application Status** feature:

 In the United States, external applications are designed and administered by the Avaya Professional Services Organization. For more information about external applications, call Avaya Contact Center CRM Solutions at 1-877-927-6662. For assistance outside the United States, contact your local Avaya distributor or representative.

## Permissions

Depending on the procedure that you want to perform, you need the following permissions:

 To view External Application Status data, the user ID used to log in to this Supervisor session requires read permission for the CMS System Setup feature. • To enable or disable the **External Application Status** feature, and start or stop external applications, the user ID used to log in to this *Supervisor* session requires *write* permission for the **CMS System Setup** feature.

# **Enabling or disabling the External Application Status feature**

This section provides the procedure for enabling or disabling the **External Application Status** feature. This feature must be enabled before external applications can be started. Disabling this feature will cause *CMS* to stop sending data and the external applications cannot be viewed.

#### Steps

1. From the Controller window, select **Tools > System Setup...**.

Supervisor displays the CMS System Setup window.

CMS System Setup	<u>```</u>	? >
Operations Report	s ]	
Operations:		
CMS State		▲ I
Data Collection		
Data Storage Allocation Data Summarizing		
External Application Status		
Free Space Allocation		
Load Pseudo-ACD Data		
Pseudo-ACD Setup		•
ACD:		
-		-
test		<u> </u>
Script		Help
	ПК П	Cancel
		Cancel

- 2. In the **Operations:** list, highlight **External Application Status**.
- 3. Select OK.

Supervisor displays the External Application Status window.

🕅 External Application Status	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
External Applications (Select one):	
Application name:	
O External application feature (turns on/off all applications)	
Application status (Select one):	
Start	
O Stop	

- 4. In the External Application (Select one): group, select the External application feature (turns on/off all applications) option.
- 5. Select the appropriate option from the **Application status (Select one):** group:
  - Start This option will enable the External Application Status feature.
  - Stop This option will disable the External Application Status feature.
- 6. From the menu bar, select Actions > Modify.

The status bar displays a message indicating if the action succeeded or failed.

## Viewing the states of external applications

This section provides the procedure for viewing the state of one or more external applications through the **External Application Status** window.

#### Steps

To view the states of any external applications:

1. From the Controller window, select **Tools > System Setup...**.

Supervisor displays the CMS System Setup window.

🚭 CMS System Setup				? ×
Operations	Reports	Ì		
Operations:				
CMS State				
Data Collection Data Storage Allocation				
Data Summarizing				
External Application Status				
Free Space Allocation Load Pseudo-ACD Data				
Pseudo-ACD Setup				-
ACD:				
test			-	
			_	- L
<u>S</u> cript			<u>H</u> elp	
		ОК	Cancel	

2. In the **Operations:** list, highlight **External Application Status**.

3. Select OK.

Supervisor displays the External Application Status window.

🕵 External Application Status	×
Actions Edit Help	
External Applications (Select one):	
Application name:	
O External application feature (turns on/off all applications)	
Application status (Select one):	
Start	
O Stop	

- 4. In the External Applications (Select one): group, select External application feature (turns on/off all applications).
- 5. From the menu bar, select **Actions > List all**.

*Supervisor* displays a secondary window displaying one or more applications, their names, and the associated states depending on which option was selected in the step above.

The status of an external application can be one of the following:

- **Starting** A request to start the external application has been made.
- **Running** The external application has started and is still running after ten seconds.
- Stopping A request to stop the external application has been made.
- Stopped All processes associated with the external application have stopped.
- **Failed** The external application has failed repeatedly and is no longer being restarted.

## Starting or stopping external applications

This section provides the procedure for starting and stopping external applications through the **External Application Status** window.

#### Steps

To start or stop an external application:

1. From the Controller window, select Tools > System Setup....

Supervisor displays the CMS System Setup window.

CMS System Setup	<u>`</u>	? X
Operations Reports	s ]	
Operations:		
CMS State		<b>_</b>
Data Collection Data Storage Allocation		
Data Summarizing		
External Application Status		
Free Space Allocation Load Pseudo-ACD Data		
Pseudo-ACD Setup		<b>_</b>
100		
ACD:		
test		<u> </u>
Script		Help
	OK	Cancel
	S	

- 2. In the **Operations:** list, highlight **External Application Status**.
- 3. Select OK.

Supervisor displays the External Application Status window.

🕅 External Application Status	×
Actions Edit Help	
External Applications (Select one):	
Application name:	
O External application feature (turns on/off all applications)	
Application status (Select one):	
Start	
O Stop	

- 4. Select the **Application name:** option and enter the name of the application to start or stop in the adjacent field.
- 5. In the Application status (Select one): group, select the appropriate option:
  - Start Supervisor will attempt to start the specified external application.
  - Stop Supervisor will attempt to stop the specified external application.

6. From the menu bar, select **Actions > Modify**.

*Supervisor* attempts to carry out the specified action. The status bar displays the results of the action.

The information that displays in the status bar after this step can consist of the following.

- Starting A request to start the external application has been made.
- **Running** The external application has started and is still running after ten seconds.
- **Stopping** A request to stop the external application has been made.
- Stopped All processes associated with the external application have stopped.
- **Failed** The external application has failed repeatedly and is no longer being restarted.

# **Free Space Allocation**

The **Free Space Allocation** window is used to view the current storage statistics and disk usage for the contact center data collected through *CMS*. This window also allows administrators to modify the ACD dbspaces (database spaces) so that more *chunks* can be added or dropped to accommodate the amount of data being stored.

Storage on the *CMS* server is managed by Informix Dynamic Server (IDS). This feature allows information to be stored in *chunks* where each one is equivalent to 256 megabytes. Each contact center entity, such as splits/skills, trunk groups, VDNs and so forth, is given an amount of data storage space on the *CMS* server through the **Data Storage Allocation** window.

If, at any time, you modify the **Data Storage Allocation** configuration, the **Free Space Allocation** window *must* be used to ensure that the appropriate number of *chunks* are allocated for use within the affected ACD dbspace. Failure to do so can result in serious data storage problems.

This section contains the following topics:

- Before you begin on page 487
- Permissions on page 488
- Viewing Free Space Allocation on page 488
- <u>Viewing Free Space Allocation contents</u> on page 490
- Modifying Free Space Allocation on page 492
- <u>Verifying chunk allocation</u> on page 493

## Before you begin

The following items should be read and understood before working with the **Free Space Allocation** feature:

- When any of the CMS data storage parameters are altered, the change is reflected (for information purposes only) in the Free Space Allocation window. For example, if the number of splits/skills on your system is increased in the Data Storage Allocation window, the Free Space Allocation window will then display the new number as well as the approximate amount of disk space required to handle the data storage for splits/ skills.
- The IDS dbspaces used in the **Free Space Allocation** window are created during installation.
- It is not necessary to disable the **Data Collection** feature in order to modify the **Free Space Allocation** window.

- If more data storage space is allocated on a file system than is available, the **Allocated Space** field in the **Free Space Allocation** window will display its value in parentheses.
- Be sure to check the **Available Space** field of an ACD dbspace before increasing any data storage parameters through the **Data Storage Allocation** feature. Doing this can ensure that there will be enough disk space available.
- Be aware that creating custom tables causes *CMS* to use more disk space. If dbspace that is used to store custom tables nears capacity, you are presented with a warning message during login.
- Values entered in the CMS System Setup features of Data Storage Allocation, Storage Intervals, and Call Work Codes directly affect usage of disk space. Check Free Space Allocation when any of these features are modified.
- Values entered in the **Data Storage Allocation** window of **Forecast Administration** also affect storage space and cause the need for **Free Space Allocation** to be run.
- If a new ACD is added, a new ACD dbspace will be created. Information on adding a new ACD to the *CMS* server can be found in the chapter, Maintaining the CMS software, in the Avaya Call Management System Software Installation, Maintenance, and Troubleshooting document.

# Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view the Free Space Allocation window, the user ID used to log in to this Supervisor session requires *read* permission for the CMS System Setup feature.
- To modify ACD dbspaces through the **Free Space Allocation** window, the user ID used to log in to this *Supervisor* session requires *write* permission for the **CMS System Setup** feature.

# Viewing Free Space Allocation

This section provides the procedure for viewing the Informix Dynamic Server (IDS) storage information and allocations through the **Free Space Allocation** window.

#### Steps

To view the usage of data storage for ACD dbspaces:

1. From the Controller window, select Tools > System Setup....

Supervisor displays the CMS System Setup window.

CMS System Setup		? ×
Operations Reports	)	
Operations:		
CMS State		<b>▲</b>
Data Collection		
Data Storage Allocation Data Summarizing		
External Application Status		
Free Space Allocation		
Load Pseudo-ACD Data		- 1
Pseudo-ACD Setup		
ACD:		
ACD:		
test		<u> </u>
Script		Help
<u>s</u> cripc		
	OK OK	Cancel
		Cancel

- 2. In the **Operations:** list, highlight **Free Space Allocation**.
- 3. Select OK.

Supervisor displays the Free Space Allocation input window.

Actions Edit He				
Enter Dbspac	e name:	_		
Data timestamp	: 2/16/01	10:09 AM		
(NOTE: All size Total Free Spa	-	:s]		
Dbspace Name	Current Size	Allocated Size	Available Space	Space used to Date
acd1	2048000	757263	1290737	394122
	0004000	010700	1691274	680496
acd2	2304000	612726	1631274	680436
acd2 acd3			136335	123272
		13687665		
acd3	13824000	13687665	136335	123272
acd3 acd4	13824000 2304000	13687665 824281	136335 1479719	123272 29438

This window displays the following information for each ACD dbspace:

- Dbspace Name The name assigned to this ACD dbspace
- **Current Size** The total amount of disk space used for this dbspace. Since IDS uses 256 MB *chunks*, this number will always be in increments of 256,000 kilobytes.
- Allocated Size The amount of space needed to store data based on the settings in the Data Storage Allocation window

- Available Space The space that will be available after all data has been collected for the time periods specified in the Data Storage Allocation window. This number is calculated by subtracting Allocated Size from Current Size.
- Space used to Date The amount of data actually stored at this time

The window may take a few minutes to open as *CMS* is calculating the current free space and other values on the system before the window can be displayed.

# **Viewing Free Space Allocation contents**

This section provides the procedure for viewing the allocations for each contact center entity within an ACD dbspace.

#### Steps

To view the amount of storage used by contact center entities within an ACD dbspace:

1. From the Controller window, select **Tools > System Setup...**.

Supervisor displays the CMS System Setup window.

CMS System Setup				?>
Operations Repo	rts			
Operations:				
CMS State				<b>A</b>
Data Collection				
Data Storage Allocation Data Summarizing				
External Application Status				
Free Space Allocation				
Load Pseudo-ACD Data				-1
Pseudo-ACD Setup				
ACD:				
test			-	
Ticat				
Script			<u>H</u> elp	
	(	OK	Cancel	
	š			

2. In the **Operations:** list, highlight **Free Space Allocation**.

#### 3. Select OK.

Supervisor displays the Free Space Allocation input window.

Free Space Allocation       Actions Edit Help       Image: State				
Enter Dbspac	e name:			
Data timestamp	: 2/16/01	10:09 AM		
(NOTE: All size	s are in Kbyte	(2:		
Total Free Spa	ce: 8447802			
<b>N N</b>	C 1.C	4.0	A 311 C	c 1. p.
Dbspace Name	Lurrent Size	Allocated Size	Available Space	Space used to Date
Ubspace Name acd1	2048000		Available Space 1290737	394122
· ·	2048000	757263	1290737	
acd1	2048000 2304000	757263 612726	1290737 1691274	394122
acd1 acd2	2048000 2304000 13824000	757263 612726 13687665	1290737 1691274	394122 680496
acd1 acd2 acd3	2048000 2304000 13824000 2304000	757263 612726 13687665 824281	1290737 1691274 136335	394122 680496 123272
acd1 acd2 acd3 acd4	2048000 2304000 13824000 2304000	757263 612726 13687665 824281 4079	1290737 1691274 136335 1479719 251921	394122 680496 123272 29438

#### Note:

The window make take a few minutes to open as *CMS* is calculating the current free space before the window can be displayed.

- 4. In the Enter Dbspace name:, enter the name of the ACD dbspace to view.
- 5. From the menu bar, select **Actions > Get contents**.

*Supervisor* displays a secondary window showing the amount of data currently in use by each contact center entity.

System Setup: Free Space	e Allocation: Get Contents	
Allocated Size in Kbytes (inc	cluding permissions) for acd1	
Agents:	456940	
Agent Trace:	1775	
Call work codes:	1650	
Agent Login/logout:	2234	
Splits/Skills:	89333	
Trunk groups:	2795	
Trunks:	133372	
VDNs:	62689	
Vectors:	6475	
Total:	757263	

# **Modifying Free Space Allocation**

This section provides the procedure for modifying the number of chunks utilized for data storage by Informix Dynamic Server (IDS).

#### Steps

To modify the number of IDS chunks assigned to ACD dbspaces:

1. From the Controller window, select **Tools > System Setup...**.

Supervisor displays the CMS System Setup window.

CMS System Setup					?
Operations	Reports	Ì			
Operations:					
CMS State					•
Data Collection					
Data Storage Allocation					
Data Summarizing					
External Application Statu Free Space Allocation	s				
Load Pseudo-ACD Data					
Pseudo-ACD Setup					<b>-</b> 1
ACD:				_	
test				•	
·			_	_	- 1
Script				<u>H</u> elp	
		-			_
		02		Cancel	

- 2. In the **Operations:** list, highlight **Free Space Allocation**.
- 3. Select OK.

Supervisor displays the Free Space Allocation input window.

Free Space Allocation       Actions Edit Help       Image: State				
(NOTE: All size Total Free Spa	-	(2		
		Allocated Size	Available Space	Space used to Date
acd1	2048000	757263	1290737	394122
acd2	2304000	612726	1691274	680496
acd3	13824000	13687665	136335	123272
acd3 acd4		13687665 824281	136335 1479719	123272 29438
	2304000			
acd4	2304000	824281	1479719	29438

#### Note:

The window make take a few minutes to open as *CMS* is calculating the current free space before the window can be displayed.

- 4. In the Enter Dbspace name:, enter the name of the ACD dbspace to adjust.
- 5. From the menu bar, select **Actions > Modify**.

*CMS* calculates if more, fewer, or the same number of chunks is required for the specified ACD dbspace and displays a dialog box asking if the process should continue.

If less than 256000 KB of disk space is available when the **Modify** command is executed, an error message will appear that states that no more ACD dbspace chunks can be created.



# It is important that you ensure that the **Current Size** is greater than the **Allocated Size**. It is possible for you to create the undesired situation where the **Allocated Size** is larger than the **Current Size** by setting large values in the **Data Storage Allocation** window and then not using the **Free Space Allocation** window to modify the ACD dbspace appropriately. While the **Free Space Allocation** window may display a positive value in the **Total Free Space** field, it is important to remember that the **Allocated Size** field is a projection of how much space will be used in the future when all the data has been collected for the time periods you have specified. If the number in the **Available Space** field is in parentheses, this indicates that there will not be enough room to store all the data.

6. If *CMS* requires a change in the number of chunks used by the ACD dbspace, select **Yes** from the dialog box.

The number of chunks for the specified ACD dbspace is modified and the status bar displays a **Successful** message.

#### A Important:

Do not reboot the system until all chunks have been moved. For more information about verifying when you can reboot the CMS system, see <u>Verifying chunk allocation</u> on page 493.

## Verifying chunk allocation

To verify that all chunks have been moved:

- 1. Open a terminal window. For more information see, Logging in to CMS on page 612.
- 2. Enter:
  - . /opt/informix/bin/setenv

#### 3. Enter:

#### onstat -d |egrep -c 'MR|MD'

4. Repeat Step 3 until only the command prompt is displayed by the system. There must be no MR or MD messages. You can reboot the system when only the command prompt is displayed by the system.

# **Migrating CMS data**

This section provides the procedures and information involved in migrating data from a backup tape that was created using a previous version of *CMS* and into the database of the new *CMS*.

This section contains the following topic:

- Before you begin on page 495
- Permissions on page 495
- Migrating R3 data on page 495

## Before you begin

The following items should be read and understood before working with the **R3 Migrate Data** window:

- Attempting to migrate Agent and Call Center Administration data more once may cause serious errors from which recovery is difficult. A re-migration of ACD administration data requires a second setup of the CMS software must be performed.
- To migrate Agent and Call Center Administration data, CMS must be in single-user mode.
- Migrations of system administration data cannot be done in phases. Migrating some user IDs at one time and others at a later time results in two separate sets of data. Only one set of data can be used and cannot be migrated into another set.

## **Permissions**

Depending on the procedure that you want to perform, you need the following permissions:

• To run the **R3 Migrate Data** process, the user ID used to log in to this *Supervisor* session requires *write* permission for **CMS System Setup**.

## **Migrating R3 data**

This section provides the procedure for using the **R3 Migrate Data** to merge data created using a previous version of *CMS* to the database of the current version.

#### Steps

To migrate R3 data into the current database:

1. From the Controller window, select **Tools > System Setup...**.

Supervisor displays the CMS System Setup window.

🚱 CMS System Setup		? ×
Operations Reports	Ì	
Operations:		
CMS State		
Data Collection Data Storage Allocation		
Data Summarizing		
External Application Status Free Space Allocation		
Load Pseudo-ACD Data		
Pseudo-ACD Setup		▼
ACD:		
test		<b>–</b>
<u>S</u> cript		Help
	OK	Cancel
	ši	

- 2. In the **Operations:** list, highlight **R3 Migrate Data**.
- 3. Select OK.

Supervisor displays the R3 Migrate Data window.

🐼 R3 Migrate Data	_ 🗆 X
Actions Edit Help	
Device name: default	
Data type:	
<ul> <li>System Administration data (single-user required)</li> <li>Agent/Call Center Admin data (single-user required)</li> <li>Historical data</li> </ul>	
Stop time: 11:59 PM	
Specify ACD(s) to migrate:	
All ACDs	
🔿 Single ACD	
from: to:	
Status:	

4. In the **Device name:** field, enter the device that will read the backup tape containing the data.

To list all devices on the system, select **Actions** > **List devices**.



If you choose the **System Administration data** option in this step, note that this migration can only be performed once. Performing the migration of this data a second time can result in corruption of the password tables.

Data type	Migrated data
System Administration data (single user required)	Report GEM files (historical) Report GEM files (real-time) Shortcut settings for <i>CMS</i> <i>CMS</i> users Timetable settings Database items Hypothetical data for the Forecast product Feature access settings, timetables, schedules, and associated tasks from the User Permissions subsystem Historical and real-time custom reports Menu and interface settings for the <i>CMS</i> terminal interface Printer parameters for the <i>CMS</i> printer

Data type	Migrated data
Agent/Call Center Admin data (single user required)	ACD profiles - VDN profiles Agent trace - agents being traced, trace data Agents - shifts, groups Dictionary - synonyms Exceptions - agent admin, link data, malicious call trace, split admin, splits, split profile, trunk group admin, VDN admin, vector admin User permissions - ACD access, split/skill access, trunk groups access, VDN access, vector access Forecast - current day report, current day configuration, call handling profiles, costs profiles, data storage allocation, special day admin, manager status, trunk group profiles
Historical data	Exceptions - agent data, split access, trunk groups, trunk group access, VDN data, vector data Historical reports - agent activity, agent login/logout, daily agent data, daily call work codes data, daily splits data, daily trunk groups data, daily trunk groups data, daily trunks data, daily VDN data, daily vector data, intrahour agent data, intrahour agent login-logout data, intrahour call work code data, intrahour split data, intrahour trunk group data, intrahour trunk data, intrahour VDN data, intrahour vector data, monthly agent data, monthly call work code data, monthly split data, monthly trunk group data, monthly trunk data, monthly VDN data, monthly vector data, weekly agent data, weekly call work code data, weekly split data, weekly trunk group data, weekly trunk data, weekly VDN data, weekly vector data Forecast - daily split data, daily trunk group data, special day split data, interval split data, interval trunk group data

6. In the **Stop date:** field, enter the date through which you wish to record data for migration to the new *CMS*. The migration process does not migrate data collected after the date specified.

Leaving this field blank will cause the program to migrate data up to the data written on the tape by the *CMS* Maintenance Backup procedure.

7. In the **Stop time:** field, enter the time through which you wish to record data for migration to the new *CMS*. The migration process does not migrate data collected after the stop date and time specified.

If this field is left blank, the stop time defaults to 23:59.

- 8. In the **Specify ACD(s) to migrate:** group, select one of the following options:
  - All ACDs Data is migrated from the backup tape to the hard disk on an ACD-by-ACD basis. Data for ACD1 on the tape backup will be used for ACD1 on the new CMS.

• **Single ACD** - Historical data is migrated from the backup tape to the hard disk for the ACDs specified in the **from:** and **to:** fields.

For example, to migrate data from ACD1 on the backup tape to ACD4 on the new *CMS*, place 1 in the **from:** field and 4 in the **to:** field.

 From the menu bar, select Actions > Run. The Run menu item appears only if the settings for Data Collection and CMS State are appropriate for the type of migration selected.

*CMS* begins the migration process. The **Status:** field will report the progress of the migration.

# **Pseudo-ACDs**

A pseudo-ACD is an area created on the CMS server to store previously backed-up ACD data. A pseudo-ACD is not a real ACD and does not communicate with any Communication Manager system.

Pseudo-ACDs are used to store data which can then be viewed in reports. This could be useful in the following scenarios:

- Storing data from an off-site contact center for the purposes of reporting in conjunction with an on-site *CMS*.
- Storing data for archival purposes. This data can no longer be deleted by the Data Storage Allocation feature and can be used to generate reports on older data for comparison with more recent ACD data.

This section contains the following topics:

- <u>Before you begin</u> on page 500
- Permissions on page 502
- Creating a pseudo-ACD on page 502
- Viewing pseudo-ACDs on page 503
- Deleting a pseudo-ACD on page 504
- Loading pseudo-ACD data on page 505

## Before you begin

The following items should be read and understood before working with pseudo-ACDs:

- Each pseudo-ACD is given a number from 9 through 26. Numbers 1 through 8 are reserved for eight real ACDs connected to the *CMS* server.
- In order to load the pseudo-ACD data, the *CMS* server must have enough free space available. Use the **Free Space Allocation** window to see how much space is required for the existing ACDs and how much is available for the pseudo-ACD data.
- Use the **Data Storage Allocation** window to define how much historical data will be stored for the pseudo-ACD. Enter storage values equal to or greater than those used from the ACD which originally held the data.
- Use the **Storage Intervals** window to set storage intervals for the pseudo-ACD data to match the interval size and data collection times of the ACD from which the data was taken.

- The Data Collection feature can be running when modifications are made in the **Data Storage Allocation** or **Storage Intervals** windows for a pseudo-ACD, but *CMS* must be in single-user mode.
- If the pseudo-ACD has the separately purchased Forecast feature on it, **Forecast Data Storage Allocation** parameters may require changes in order to match those of the pseudo-ACD. This is not the same as the **Data Storage Allocation** window normally used in *CMS*.
- In order for users to access the pseudo-ACD, permissions must be given through the **ACD Access** window in the **User Permissions** subsystem.
- A pseudo-ACD can have a name assigned to it in the Dictionary even before the pseudo-ACD is created.
- Creation of a pseudo-ACD using *Supervisor* while users are logged in requires that the users log out and back in before they can see the new pseudo-ACD.
- Before deleting a pseudo-ACD, turn off permissions to it so that users will not be working in the pseudo-ACD when it is deleted.
- CMS does not automatically summarize pseudo-ACD data.
- The following menu items are available when a pseudo-ACD is selected and the appropriate user permissions are assigned:

Reports	CMS System Setup	Maintenance	
Historical	CMS State	ACD Status	
Dictionary	Data Collection	Archiving Status	
all submenu items	Data Storage	Backup Data	
Forecast	Allocations	Backup/Restore	
all submenu items	Data Summarizing	Devices	
Custom Reports	Free Space Allocation	Connection Status	
all submenu items	Load Pseudo-ACD	Printer Administration	
User Permissions	Pseudo-ACD Setup	Restore Data	
all submenu items	R3 Migrate Data		
	Storage Intervals		
	Switch Setup		

# Permissions

Depending on the procedure that you want to perform, you need the following permissions:

- To view the **Pseudo-ACD Setup** window, the user ID used to log in to this *Supervisor* session requires *read* permission for the **CMS System Setup** feature.
- To add or delete pseudo-ACDs, the user ID used to log in to this *Supervisor* session requires *write* permission for the **CMS System Setup** feature.

# Creating a pseudo-ACD

This section provides the procedure for creating a pseudo-ACD on a CMS server.

#### Steps

To create a pseudo-ACD on a CMS server:

1. From the Controller window, select **Tools > System Setup...**.

Supervisor displays the CMS System Setup window.

CMS System Setup				?>
Operations R	eports			
Operations:				
CMS State				<b>A</b>
Data Collection				
Data Storage Allocation				
Data Summarizing				
External Application Status				
Free Space Allocation Load Pseudo-ACD Data				
Pseudo-ACD Setup				<b>_</b> 1
Il seddo Aeb Selap				_
ACD:				
test			-	
Tiest				
Script			<u>H</u> elp	
<u>s</u> onp				
	[r	ПК	Cancel	1
		UN	Caricer	

2. In the **Operations:** list, highlight **Pseudo-ACD Setup**.

3. Select OK.

Supervisor displays the Pseudo ACD Setup window.

🕅 Pseudo ACD Setup 🛛 🗶
Actions Edit Help
ACD:

- 4. In the **ACD**: field, enter the number or the name of the pseudo-ACD. The number can range from 9 to 26. This field requires a number to be entered if a name for this pseudo-ACD has not been defined in the Dictionary.
- 5. From the menu bar, select **Actions > Add**.

CMS creates the pseudo-ACD.

# Viewing pseudo-ACDs

This section provides the procedure for listing the pseudo-ACDs on a CMS server.

#### Steps

To list pseudo-ACDs on a CMS server:

1. From the Controller window, select **Tools > System Setup...**.

Supervisor displays the CMS System Setup window.

0	Reports	)		
Operations	reports			
Operations:				
CMS State				<b>A</b>
Data Collection				
Data Storage Allocation				
Data Summarizing External Application Status				
Free Space Allocation				
Load Pseudo-ACD Data				
Pseudo-ACD Setup				-
ACD.				
ACD:				
ACD: test			•	
test			Help	1
			▼ <u>H</u> elp	

2. In the Operations: list, highlight Pseudo-ACD Setup.

3. Select OK.

Supervisor displays the Pseudo ACD Setup window.

🕅 Pseudo ACD Setup 🛛 🛛
Actions Edit Help
\$ \$ <b>∕ ∖ ∕ ≡ 1</b>
ACD:

4. From the menu bar, select **Actions > List all**.

*Supervisor* displays a secondary window listing all ACDs. The status bar displays the total number of pseudo-ACDs on the *CMS* server. Only those ACDs for which this user ID has *read* permission are displayed.

# **Deleting a pseudo-ACD**

This section provides the procedure for deleting a pseudo-ACD on a CMS server.

#### Steps

To delete a pseudo-ACD on a CMS server:

1. From the Controller window, select **Tools > System Setup...**.

Supervisor displays the CMS System Setup window.

	Ϋ́ X
Operations Reports	
Operations:	
CMS State	▲
Data Collection	
Data Storage Allocation	- 10
Data Summarizing External Application Status	- 10
Free Space Allocation	
Load Pseudo-ACD Data	
Pseudo-ACD Setup	<b>_</b>
ACD:	
test 💌	
Script	elp
OK Ca	ncel

2. In the **Operations:** list, highlight **Pseudo-ACD Setup**.

3. Select OK.

Supervisor displays the Pseudo ACD Setup window.

🕅 Pseudo ACD Setup 🛛 🕅
Actions Edit Help
◆§ <b>/ ≒ </b> / <b>≣ A</b>
ACD:

- 4. In the **ACD:** field, enter the name or number of a pseudo-ACD to delete.
- 5. From the menu bar, select **Actions > Find one**.

The status bar displays whether a match was found for the specified pseudo-ACD.

6. From the menu bar, select Actions > Delete.

*CMS* deletes the pseudo-ACD, the associated data, and any associated disk space. When the operation completes, *Supervisor* displays a **Successful** message in the status bar.

## Loading pseudo-ACD data

This section provides the procedure for loading historical data archived from an existing ACD into a pseudo-ACD. After the pseudo-ACD receives the data, historical reports can be run with this information.

#### Before you begin

The following items should be read and understood before loading data into a pseudo-ACD:

- A pseudo-ACD must have been created in order for data to be loaded into it.
- Loading data into a pseudo-ACD requires data archived from an existing ACD on a *CMS* server.
- Set the pseudo-ACD as the current ACD before attempting to load data into it.
- Since the pseudo-ACD accepts any data on a backup volume, the data from a full backup may be more than needed. Loading a pseudo-ACD with a full backup creates the possibility of disk space problems. To eliminate this problem, perform a **Specific Tables** backup when creating the ACD data to load on a pseudo-ACD.
- Loading a pseudo-ACD with data automatically overwrites any existing data currently used by the pseudo-ACD.

- The number of splits/skills, agents, and other contact center entities are set to 0 (zero) for the pseudo-ACD when it is created. Set these entities to match the ACD supplying the data. Change these settings through the **Call Center Administration** feature.
- When created, a new pseudo-ACD has historical data storage parameters set to 0 (zero). To load data into the pseudo-ACD, the historical data storage parameters must be set to those of the ACD from which the data was archived, if not greater. Change these settings through the **Data Storage Allocation** window.
- The **Storage Intervals** and **Data Collection** settings for the pseudo-ACD require configuration in order to match those of the ACD supplying the data. If these settings are incorrect, loading the data into the pseudo-ACD fails.

### Permissions

To load data into a pseudo-ACD, the user ID used to log in to this *Supervisor* session requires *write* permission for the **CMS System Setup** feature.

### Steps

To load a data backup into a pseudo-ACD:

1. From the Controller window, select **Tools > System Setup...**.

Supervisor displays the CMS System Setup window.

🖗 CMS System Setup		? ×
Operations Report	rts	
Operations:		
CMS State		<b>▲</b>
Data Collection		
Data Storage Allocation Data Summarizing		
External Application Status		
Free Space Allocation		
Load Pseudo-ACD Data		-1
Pseudo-ACD Setup		
ACD:		
test		
liest		
Script		Help
	OK	Cancel
	<u></u>	

- 2. In the **ACD:** field, select the pseudo-ACD that will receive the data.
- 3. In the **Operations:** list, highlight **Load Pseudo-ACD Data**.

#### 4. Select OK.

Supervisor displays the Load Pseudo-ACD Data window.

🕵 Load Pseudo-ACD Data	×
<u>A</u> ctions <u>E</u> dit <u>H</u> elp	
Status:	
Errors:	
From ACD:	
Device name:	
Start date:	
Start time: 12:00 AM	
Stop date :	
Stop time : 12:00 AM	
	Bison36vpe

- 5. In the **From ACD:** field, enter the number of the ACD used to make the data backup.
- 6. In the **Device name:** field, enter the name of the device that has the backup volume loaded.

To list all the devices on the *CMS* server, select **Actions** > **List devices** from the menu bar.

- 7. In the **Start date:** field, enter the date representing the first day of historical data to load on the pseudo-ACD. *CMS* searches the data backup for this date which serves as the starting point for loading data.
- 8. In the **Start time:** field, enter the time of the **Start date:** for which *CMS* will start loading data. The default is **12:00**AM.
- 9. In the **Stop date:** field, enter the last date of historical data that *CMS* will load on the pseudo-ACD.
- 10. In the **Stop time:** field, enter the time of the **Stop date:** for which *CMS* will stop loading data from the data backup. The default is **12:00**AM.
- 11. From the menu bar, select **Actions > Run**.

*CMS* begins loading data from the backup into the pseudo-ACD. The **Status:** field at the top of the window displays events in the loading process. The **Errors:** field displays any problems encountered during the loading process.

Cancelling the load process before it is finished will cause the pseudo-ACD to have partial data.

# **Storage intervals**

The **Storage Intervals** window allows changes to be made to *CMS* which affect how and when data for the contact center is stored.

It is recommended that these settings are configured during installation and not changed because subsequent changes will affect data storage and report data coverage.

This section contains the following topics:

- Before you begin on page 508
- Permissions on page 508
- <u>Viewing storage interval settings</u> on page 509
- <u>Changing the intrahour interval</u> on page 510
- Changing switch time zone on page 512
- Modifying data summarizing settings on page 514

## Before you begin

The following items should be read and understood before working with the **Storage Intervals** window:

- *CMS* must be in single-user mode and the data collection must be off before modifications to these settings can be made.
- Do not open another **Storage Intervals** window if one is already being used to alter these settings. The loss of data tables can result if multiple **Storage Intervals** windows are used.
- Free space allocation, data storage allocation, and storage intervals closely tied. A change in storage intervals may require adjustment of data storage or storage times in the **Data Storage Allocation** and **Free Space Allocation** windows. The more frequently *CMS* archives data, the more storage space is required.

## Permissions

Depending on the procedure that you want to perform, you need the following permissions:

 To view settings in the Storage Intervals window, the user ID used to log in to this Supervisor session requires read permission for the CMS System Setup feature. • To modify settings in the **Storage Intervals** window, the user ID used to log in to this *Supervisor* session requires *write* permission for the **CMS System Setup** feature.

## Viewing storage interval settings

This section provides the procedure for viewing the **Storage Interval** settings for contact center data.

#### Steps

To view settings in the Storage Intervals window:

1. From the Controller window, select **Tools > System Setup...**.

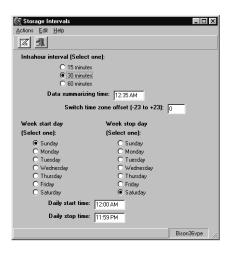
Supervisor displays the CMS System Setup window.

CMS System Setup	? ×
Operations Reports	
Operations:	
CMS State	
Data Collection	
Data Storage Allocation Data Summarizing	
External Application Status	
Free Space Allocation	
Load Pseudo-ACD Data	_
Pseudo-ACD Setup	<u> </u>
ACD:	
test	•
<u>S</u> cript	<u>H</u> elp
	OK Cancel

- 2. In the **Operations:** list, highlight **Storage Intervals**.
- 3. In the **ACD:** field, select the ACD for which settings will be viewed.

4. Select OK.

Supervisor displays the Storage Intervals window.



## Changing the intrahour interval

This section provides the procedure for changing the rate at which *CMS* archives data within a one-hour time period.

### Before you begin

The following items should be read and understood before changing the intrahour interval setting:

- Changing the intrahour interval can result in a lengthy process as *CMS* must make modifications to all previously collected data.
- Increasing the frequency of the intrahour interval results in the contact center data taking more storage space. This can require changes to the length of time for which *CMS* stores contact center data. To change the length of time which data is stored, use the **Data Storage Allocation** window.
- Perform a full backup of historical data before making changes to the intrahour interval or data collection times or dates. After the changes are made, perform another full backup of historical data.
- Real-time reports use the intrahour interval when displaying data. Cumulative data is reset to zero at the beginning of each intrahour interval.

### Steps

To change the setting for the intrahour interval:

1. From the Controller window, select **Tools > System Setup...**.

Supervisor displays the CMS System Setup window.

🖗 CMS System Setup		? ×
Operations Reports	)	
Operations:		
CMS State		A
Data Collection		
Data Storage Allocation Data Summarizing		
External Application Status		
Free Space Allocation		
Load Pseudo-ACD Data		- 1
Pseudo-ACD Setup		
ACD:		
-		
test		<u> </u>
Script		Help
	OK	Cancel
	<u>.</u>	

- 2. In the **Operations:** list, highlight **Storage Intervals**.
- 3. In the **ACD:** field, select the ACD for which the intrahour interval will be changed.
- 4. Select OK.

Supervisor displays the Storage Intervals window.

👧 Storage Intervals		_ 🗆 ×
Actions Edit Help		
<b>Z 1</b>		
Intrahour interval (Sele	ct one):	
<ul> <li>15 minu</li> <li>30 minu</li> <li>60 minu</li> </ul>	utes	
Data summari	zing time: 12:35 AM	
Switch	time zone offset (-23 to +23)	0
Week start day	Week stop day	
(Select one):	(Select one):	
Sunday	🔿 Sunday	
O Monday	🔿 Monday	
Tuesday	🔿 Tuesday	
🔿 Wednesday	🔿 Wednesday	
O Thursday	O Thursday	
O Friday	O Friday	
🔿 Saturday	Saturday	
Daily start tin	12:00 AM	
Daily stop tin	ne: 11:59 PM	
		Bison36vpe //

5. In the **Intrahour interval (Select one):** group, select the option for the rate at which *CMS* archives contact center data.

### **A** CAUTION:

Do not open another **Storage Intervals** window and attempt to change other settings during the following step. Doing so can result in the loss of database tables.

6. From the menu bar, select Actions > Modify.

*CMS* records the setting change and alters all previously recorded data to match this setting. This update process is lengthy and must not be interrupted. The status bar will display a **Successful** message when the operation completes.

- 7. Restart data collection. See <u>Changing the data collection state</u> on page 467 for information on this procedure.
- 8. Return *CMS* to multi-user mode. See the <u>Changing the CMS state</u> on page 463 for information on this procedure.

## Changing switch time zone

This section provides the procedure on changing the time zone settings for an ACD so that it matches the time zone of the *CMS* server. Use this feature if you want the CMS title bar to show the time where the CMS is located instead of the master ACD time. If you do not use this feature, the CMS title bar will automatically display the master ACD time.

This procedure is only necessary for those configurations where an ACD resides in a different time zone than that of the *CMS* server, but you want the title bar to display the *CMS* time.

### Before you begin

The following items should be read and understood before changing the time zone for an ACD:

- *CMS* must be in single-user mode and the data collection must be off before modifications to these settings can be made.
- If an ACD is connected to a *CMS* server in the same time zone, the **Switch time zone** offset: field should be set to **0**.
- This procedure does *not* effect the time stamps on the *CMS* reports, real time or historical.
- This procedure does *not* effect the timetable schedule for timetables set to run at local times for a specific ACD.

### Steps

To change the time zone offset for an ACD:

1. From the Controller window, select **Tools > System Setup...**.

Supervisor displays the CMS System Setup window.

CMS System Setup		? ×
Operations Reports		
Operations:		
CMS State		<b>▲</b>
Data Collection		
Data Storage Allocation Data Summarizing		
External Application Status		
Free Space Allocation		
Load Pseudo-ACD Data		
Pseudo-ACD Setup		▼
ACD: test		<b>_</b>
· · · · · · · · · · · · · · · · · · ·		
<u>S</u> cript		
	OK	Cancel

- 2. In the **Operations:** list, highlight **Storage Intervals**.
- 3. In the **ACD:** field, select the ACD which will have its time zone offset changed.
- 4. Select OK.

Supervisor displays the Storage Intervals window.

🕵 Storage Intervals	
Actions Edit Help	
<b>Z A</b>	
Intrahour interval (Sele	ect one):
<ul> <li>15 min</li> <li>30 min</li> <li>60 min</li> </ul>	utes
Data summar	izing time: 12:35 AM
Switch	time zone offset (-23 to +23):
Week start day	Week stop day
(Select one):	(Select one):
Sunday	○ Sunday
🔿 Monday	O Monday
O Tuesday	O Tuesday
O Wednesday	🔿 Wednesday
O Thursday	O Thursday
O Friday	O Friday
🔿 Saturday	<ul> <li>Saturday</li> </ul>
Daily start ti	ne: 12:00 AM
Daily stop ti	ne: 11:59 PM
	Bison36vpe

5. In the **Switch time zone offset (-23 to +23):** field, enter the number of hours that will convert the time zone of the ACD so that it matches the time zone of the *CMS* server.

If the ACD time is ahead of the *CMS* time, you must enter a plus sign (+) followed by the number of hours the ACD is ahead. If the ACD time is behind the *CMS* time, you must enter a minus sign (-) followed by the number of hours the ACD is behind.

For example, if the master ACD is in New York City and the *CMS* server is in Los Angeles, you would enter +3 because the ACD is 3 hours ahead of the *CMS* time. The time zone offset does not affect the time stamps that are used with historical data.

6. From the menu bar, select Actions > Modify.

*CMS* adjust the time setting of the ACD by the value specified. The status bar will display a **Successful** message when the operation is complete.

#### Note:

The CMS time reverts to the Unix clock if the link to the ACD that is designated as the master clock stops functioning. Even if the link begins to function normally, the only way CMS will reset back to the master clock is to either:

- Turn CMS off and then on
- Reboot the server
- 7. Restart data collection. See <u>Changing the data collection state</u> on page 467 for information on this procedure.
- 8. Return *CMS* to multi-user mode. See <u>Changing the CMS state</u> on page 463 for information on this procedure.

## Modifying data summarizing settings

This section provides the procedure for modifying the times and days for which contact center data is recorded and summarized.

#### Before you begin

The following items should be read and understood before modifying data summarizing settings:

- *CMS* must be in single-user mode and the data collection must be off before modifications to these settings can be made.
- Perform a full backup of historical data before making changes to the data collection times or dates. After the changes are made, perform another full backup of historical data.
- When a weekly report is requested, the date entered must correspond to the day of the week specified in the **Week start day** field.



Do not open another **Storage Intervals** window and attempt to change other settings while modifying these settings. Doing so can result in the loss of database tables.

### Steps

To modify the CMS date and time settings for data summarizing:

1. From the Controller window, select **Tools > System Setup...**.

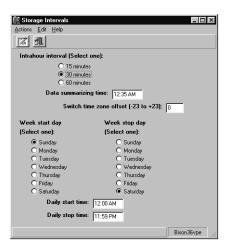
Supervisor displays the CMS System Setup window.

CMS System Setup		_	?)
Operations Repor	ts		
Operations:			
CMS State			<b>▲</b>
Data Collection			
Data Storage Allocation			
Data Summarizing External Application Status			
Free Space Allocation			
Load Pseudo-ACD Data			
Pseudo-ACD Setup			<b>•</b>
ACD:			
test		-	
1			
Script			<u>H</u> elp
	<u>П ПК</u>		Cancel
	L		

- 2. In the **Operations:** list, highlight **Storage Intervals**.
- 3. In the **ACD:** field, select the ACD which will have its data summarizing settings changed.

4. Select OK.

Supervisor displays the Storage Intervals window.



- 5. In the **Data summarizing time:** field, enter the time when *CMS* should summarize data for the previous day, week, and month. The time must be entered in one of the following formats:
  - HH:MM PM For example, 12:35 AM
  - 24-hour format For example, 00:35

If you do not wish to change this field, skip this step and proceed to the next.

The time entered in this field must be equal to or greater to intrahour interval in order to allow *CMS* to finish archiving data. The default time for this field is **12:35 AM**.

Weekly summaries are started on the day following the day specified in the **Week stop day** field. Monthly summaries are started on the first day of the next month. For example, the monthly summary for January is done on the first day of February.

To run data summarizing on the day for which data was collected, the **Data** summarizing time: field must be set for 15 minutes after the **Daily stop time** and prior to midnight. For example, the **Data summarizing time:** field can be set to 11:59 PM or 23:59. This would require that the **Daily stop time:** field be set to 11:44 PM or 23:44.

6. In the **Week start day (Select one):** group, select the day that represents the start of the work week for the contact center.

If you do not wish to change this field, skip this step and proceed to the next.

The default value for this field is **Sunday**.

7. In the **Week stop day (Select one):** group, select the day that represents the end of the work week for the contact center.

If you do not wish to change this field, skip this step and proceed to the next.

The default value for this field is **Saturday**. Data through the end of the stop day is collected and included in the weekly summary.

When the start or stop day is changed for the week, the data from the old start day through the new stop day for the week is archived.

If possible, make any changes to the **Week start day** and **Week stop day** after *CMS* performs the weekly archive. This change is not possible for a seven-day week. When the start and stop day for the week are changed, the current week will contain the data item, **INCOMPLETE**, to indicate that the data for this week is peculiar since the definition of that week was changed.

If the **Week start day** and **Week stop day** are identical, data for only one day will be collected for that week.

- 8. In the **Daily start time:** field, enter the time at which data collection should start. Enter the time in one of the following formats:
  - HH:MM PM For example, 12:00 AM
  - 24-hour format For example, 00:00

If you do not wish to change this field, skip this step and proceed to the next.

The default value for this field is **12:00** AM (midnight).

9. In the **Daily stop time:** field, enter the time at which data collection should stop. Enter the time in one of the formats specified in the previous step.

If you do not wish to change this field, skip this step and proceed to the next.

The default value for this field is **11:59 PM**. Data is collected through the end of the minute specified.

Do not enter the same time in this field as in the **Daily start time:** field. Doing so will result in data being collected for only one minute per day.

10. From the menu bar, select **Actions > Modify**.

*CMS* updates the data summarizing parameters as specified. A **Successful** message appears in the status bar when *CMS* completes the operation.

- 11. Restart data collection. See <u>Changing the data collection state</u> on page 467 for information on this procedure.
- 12. Return *CMS* to multi-user mode. See <u>Changing the CMS state</u> on page 463 for information on this procedure.

# Switch setup

Use the **Switch Setup** window to view the following information:

- Communication Manager setup information ACD name, release, and activated features, such as Call Vectoring, Call Prompting, and Expert Agent Selection (EAS)
- CMS software information release, version, and load
- Phantom abandon call timer values

This section contains the following topics:

- Before you begin on page 518
- Permissions on page 519
- Viewing switch setup data on page 519
- Listing all switch setup data on page 520

## Before you begin

The following items should be read and understood before working with the **Switch Setup** window:

- The **Switch Setup** window can only display real ACDs. Pseudo-ACDs are not supported.
- This window can only be used to view information. No modifications to the ACD can be made through *Supervisor*.
- The phantom abandon call timer is used to determine which calls to count as abandoned calls rather than ACD call. If the call lasts less than the number of seconds specified, the Communication Manager system considers it an abandoned call. The feature is useful in areas where the central office does not provide disconnect supervision on trunks.
- To display an ACD name in the **Switch Setup** window, it must first have the name assigned in the Dictionary. See <u>Adding an ACD name</u> on page 62 for more information on this procedure.

## Permissions

Depending on the procedure that you want to perform, you need the following permissions:

• To view ACDs in the **Switch Setup** window, the user ID used to log in to this *Supervisor* session requires *read* permission for the **CMS System Setup** feature.

## Viewing switch setup data

This section provides the procedure for viewing setup information for an ACD.

### Steps

To view the setup settings for an ACD:

1. From the Controller window, select **Tools > System Setup...**.

Supervisor displays the CMS System Setup window.

Operations	Reports	)		
Operations:	,			
CMS State				<b></b>
Data Collection Data Storage Alloca	ation			
Data Summarizing	adon			
External Application	Status			
Free Space Allocati Load Pseudo-ACD I				
Pseudo-ACD Setup				-
,				
ACD:				
ACD:			•	
-			<b>_</b>	elp
test			<b>▼</b>	elp

2. In the **Operations:** list, highlight **Switch Setup**.

3. Select OK.

Supervisor displays the Switch Setup window.

Switch Setup       Actions       Edit       Help	×
ACDs:	
Switch type: Switch release: Purchased CMS release and version: CentreVu CMS load:	
Phantom abandon call timer (seconds):	
Switch features:	
	Bison36vpe

4. In the ACD: field, enter the name or number of the ACD to display.

To have all ACDs returned from the query so that you can cycle through them in this dialog, leave this field blank and proceed to the next step.

5. From the menu bar, select **Actions > Find one**.

*Supervisor* displays the setup information for the specified ACD. If more than one match was found, use the **Next** and **Previous** items under **Actions** menu to cycle through them.

## Listing all switch setup data

This section provides the procedure for viewing setup information for all ACDs.

### Steps

To view the setup settings for all ACDs:

1. From the Controller window, select **Tools > System Setup...**.

Supervisor displays the CMS System Setup window.

CMS System Setup		?
Operations Report	s Ì	
Operations:		
CMS State		<b>▲</b>
Data Collection Data Storage Allocation		
Data Summarizing		
External Application Status		
Free Space Allocation		
Load Pseudo-ACD Data		-
Pseudo-ACD Setup		
ACD:		
-		
test		<b>•</b>
Script		Help
<u>S</u> cipt		<u> </u>
	П. ПК	
	UK	Cancel

- 2. In the **Operations:** list, highlight **Switch Setup**.
- 3. Select OK.

Supervisor displays the Switch Setup window.

🕅 Switch Setup	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
ACDs:	
Switch type:	
Switch release:	
Purchased CMS release and version:	
CentreVu CMS load:	
Phantom abandon call timer (seconds):	
Switch features:	
	Bison36vpe

4. From the menu bar, select **Actions > List all**.

Supervisor displays a secondary window listing all ACDs and their associated settings.

Pu	Purchased CMS release and version: R3V9						
Ce	ntreVu CMS	load: r3v9ac.	g				
ACD	ACD Name	Switch Type	Switch Release	Phantom Abandon Call Timer	Switc	h Featu	ires
1	East	Definity	R8	off	vector	prompt	EAS
2	South	Definity	R9/R10	off	vector	prompt	EAS
3	North	Definity	R9/R10	off	vector	prompt	EAS
4	West	Definity	R8	off	vector	prompt	

. . . . .

# **Chapter 11: Maintaining CMS**

Maintaining a *CMS* server consists of routine tasks such as backing up data, checking the status of the *CMS* connection to the switch, and viewing the maintenance error log.

The Maintenance menu allows you to perform the following tasks:

- Initiate CMS backups and restores
- Assign a name and description to the full path name for a device used for data backups
- Assign printer names and options
- Monitor the data link between the CMS server and the switch
- View the measurement status of a particular ACD
- View the Maintenance Error Log
- View the archiving status

This section contains the following topics:

- Before you begin on page 524
- ACD status on page 524
- Archiving status on page 532
- <u>Backup/restore devices</u> on page 537
- Data Backup on page 546
- Restoring data on page 560
- Connection status on page 566
- Administering a printer on page 572
- <u>Maintenance Error Log</u> on page 579
- <u>ACD Administration Log</u> on page 606

# Before you begin

If an ACD Group is selected as the current ACD in the **Maintenance** window, only those operations that are valid for the ACD Group will appear in the **Operations:** list.

# ACD status

The **ACD Status** window displays information about the current selected ACD, including the number of splits or skills, agents logged in, trunk groups, trunks, VDNs, vectors (if your company has purchased Call Vectoring), and measured splits. You can also use the ACD status window to request a complete set of translations from a specific ACD. The ACD status window will look different if your switch has Expert Agent Selection (EAS).

This section contains the following topics:

- Before you begin on page 524
- Permissions on page 525
- Viewing ACD status on page 525
- Listing ACD status on page 528
- <u>Description of the ACD Status window with EAS</u> on page 529
- <u>Description of the ACD Status window without EAS</u> on page 530
- Requesting ACD translations on page 531

### Before you begin

The following items should be read and understood before viewing the status of an ACD through the Maintenance subsystem:

- The link must be up between the Communication Manager system and the CMS, if you want to view the status or request translations from a specific ACD.
- Data collection must be on for the specific ACD for the translations you request.
- The data will be lost during a translations pump-up. An acknowledgement window will ask if you want to proceed.

## Permissions

Depending on the procedure you wish to perform, you will need the following permissions:

- To view the ACD Status window, you need to have *read* permission for the Maintenance subsystem.
- To request translations, you need to have *write* permission for the **Maintenance** subsystem.

## **Viewing ACD status**

1. From the Controller window, select **Tools > Maintenance**.

Supervisor displays the **Maintenance** window.

Operations	Reports	Ì		
Operations:				
ACD Status				
Archiving Status Back Up Data				
Backup/Restore Devic	ces			
Connection Status				
Printer Administration Restore Data				
nestore Data				
ACD:				
ACD: Bison36vpe				
Bison36vpe				
-				зlp
Bison36vpe		ΟΚ	<u>H</u> e Car	

- 2. Select the **Operations** tab.
- 3. Highlight ACD Status in the Operations: list.

4. Select OK.

Supervisor displays the ACD Status window.

If your Communication Manager system does not have EAS, *Supervisor* displays the following window:

ACD Status			×
Actions Edit Help			
	1		
ACD(s):			
CMS is measuring:			
Splits:			
	Total split members:		
Split members in use:			
Trunk groups:		Splits	
Trunks:			
VDNs:			
Vectors:			
Errors:			
			acd6G3

If your Communication Manager has EAS, Supervisor displays the following window:

ACD Status		×
<u>A</u> ctions <u>E</u> dit <u>H</u> elp		
ACD(s):	- 1	
CMS is measuring:		
Skills:		
Skill members in use:		
Trunk groups:		
Trunks:		
VDNs:		
Vectors:		
_		
Errors:		
		Bison36vpe

For additional information on the fields in the **ACD Status** window, see <u>Description of</u> the ACD Status window - with EAS on page 529 and <u>Description of the ACD Status</u> window - without EAS on page 530.

5. Perform one of the following steps to enter information in the ACD(s): field:

- Enter the name or number of the ACD directly into the field.
- Use the history list to select an ACD.
- Use the Browse button to select an ACD.

#### Note:

You can also select an ACD Group which will return all the members of that group.

6. From the **Actions** menu, select **Find one**.

Supervisor displays the ACD Status window for the selected ACD.

CD Status	x
Actions Edit Help	
ACD(s): acd663	
CMS is measuring:	
Splits: 40	
Total split members:	
Split members in use: 201	
Trunk groups: 3	
Trunks: 288	
VDNs: 40	
Vectors: 512	
Errors:	
	acd6G3

If you selected an ACD Group, the first member of the group is displayed. View any other member ACDs by using the **Next** and **Previous** buttons.

## Listing ACD status

To list the status of all ACDs:

1. From the Controller window, select **Tools > Maintenance**.

Supervisor displays the Maintenance window.

🖗 Maintenance					? ×
Operations	Reports		)		
Operations: ACD Status Archiving Status Back Up Data Back up/Restore Devic Connection Status Printer Administration Restore Data	es				
ACD: Bison36vpe Script				∎ <b>_</b> <u>H</u> elp	
		OK		Cancel	

- 2. Select the **Operations** tab.
- 3. Highlight ACD Status in the Operations: list.
- 4. Select OK.

Supervisor displays the ACD Status window.

- 5. From the Edit menu, select Clear all.
- 6. From the Actions menu select List all.

Supervisor displays the ACD Status - List All window.

ACD Status - List All							
ACD	Splits/ Skills	Members	Members In Use	Trunk Grps	Trunks	VDNs	Vectors
cqadads22	40		201	3	288	40	512
cgadads21	20		480	3	288	16	512
Bull_R8vpe	213		190	8	212	16996	999
	ound; permitted o						RBype

# Description of the ACD Status window - with EAS

ACD Status	×
Actions Edit Help	
ACD(s):	
CMS is measuring:	
Skills:	
Skill members in use:	
Trunk groups:	
Trunks:	
VDNs:	
Vectors:	
Errors:	
	Bison36vpe

### **Field descriptions**

The following table provides the descriptions of the fields on the **ACD Status** window where Expert Agent Selection (EAS) is installed:

Field	Description
Skills	The skills measured by CMS.
Skill members in use	The agent/skill pairs logged in at the time the <b>ACD Status</b> window was opened.
Trunk groups	The trunk groups measured by CMS.
Trunks	The trunks measured by CMS. Unmeasured trunks are not included.
VDNs	The VDNs measured on the selected ACD.
Vectors	The vectors available for use in the selected ACD.
Errors	The errors encountered by the ACD.

# Description of the ACD Status window - without EAS

### **Field descriptions**

Actions Edit Help  ACD(s):  CMS is measuring:  Splits:  Total split members:  Split members in use:  Trunk groups:  Splits  Trunks:  VDNs: Vectors:  Errors:			
ACD(s): CMS is measuring: Splits: Total split members: Split members in use: Trunk groups: Splits Trunks: VDNs: Vectors: Errors:	🕿 ACD Status		×
ACD(s): CMS is measuring: Splits: Total split members: Split members in use: Trunk groups: Splits Trunks: VDNs: Vectors: Errors:	<u>Actions</u> <u>Edit</u> <u>H</u> elp		
CMS is measuring: Splits: Total split members: Split members in use: Trunk groups: Splits Trunks: VDNs: Vectors: Errors:			
Splits: Total split members: Split members in use: Trunk groups: Splits Trunks: VDNs: Vectors: Errors:	ACD(s):		
Total split members: Split members in use: Trunk groups: Splits Trunks: VDNs: Vectors: Errors:	CMS is measuring:		
Split members in use: Trunk groups: Splits Trunks: VDNs: Vectors: Errors:	Splits:		
Trunk groups: Splits Trunks: VDNs: Vectors: Errors:	Total split members:		
Trunks: VDNs: Vectors: Errors:	Split members in use:		
VDNs: Vectors: Errors:	Trunk groups:	Splits	
VDNs: Vectors: Errors:	Trunks:		
Vectors:			
Errors:			
	Vectors:		
	Errors:		
0201			
acdbu3			acd6G3

The following table provides the descriptions of the fields on the **ACD Status** window where Expert Agent Selection (EAS) is not installed:

Field	Description
CMS is measuring	The current value of each of the following items.
Splits	The splits measured by CMS.
Total split members	The agent/split pairs logged in at the time the <b>ACD Status</b> window was opened.
Trunk groups	The trunk groups measured by CMS.
Trunks	The trunks measured by CMS. Unmeasured trunks are not included.
VDNs	The VDNs measured on the ACD.
Vectors	The vectors available for use in the selected ACD.
Measured splits	The number of measured splits in a selected ACD.
Errors	Errors encountered by the ACD.

## **Requesting ACD translations**

The ACD translation request was used to manually synchronize the measure contact center entities from an ACD to the *CMS* server.

### Important:

This functionality was available for Generic 2 and System 85 switches and is no longer needed when your *CMS* server is connected to a Communication Manager system. ACD translations are downloaded automatically when changes are made to measured contact center entities.

Communication Manager system and can result in inaccurate reports.



If you request an ACD translation, contact center data is interrupted on the

# **Archiving status**

Use the **Archiving Status** window to display the status, date, and time of the last archive for interval, daily, weekly, and monthly data. This information can help you decide when to turn off data collection or change your archiving times to minimize data loss.

This information can help you decide when to turn off data collection or change your archiving times without losing data.

This section contains the following topics:

- Before you begin on page 532
- Permissions on page 532
- Viewing the archiving status of a single ACD on page 533
- Viewing the archiving status of all ACDs on page 534
- Description of the Archiving Status List All window on page 536

## Before you begin

The following items should be read and understood before working with the **Archiving Status** window:

- Archive indicates that CMS is storing interval, daily, weekly, and monthly data in the appropriate database tables.
- The three archive status indications are:
  - Finished The last archive has been completed
  - Running The archive is currently running
  - Not run The archive has never run

## **Permissions**

You need *read* permission for the **Maintenance** subsystem to view the **Archiving Status** window.

## Viewing the archiving status of a single ACD

### Steps

To view the archiving status of a single ACD:

1. From the Controller window, select **Tools > Maintenance**.

Supervisor displays the Maintenance window.

)perations	Reports	)		
Dperations:				
ACD Status				
Archiving Status Back Up Data				
Backup/Restore Devic	ces			
Connection Status				
Printer Administration Restore Data				
ACD:				
Bison36vpe			<u> </u>	
Script				lelp
<u>a</u> ciipt				īeih
		OK		incel

- 2. Select the **Operations** tab.
- 3. Select Archiving Status in the Operations: list.
- 4. Select OK.

Supervisor displays the Archiving Status window.

Archiving Status	×
Actions Edit Help	
ACD(s):	
Archiving type (Select any you wish):	
🔽 Interval	
🔽 Daily	
🔽 Weekly	
Monthly	
	Bison36vpe

- 5. Perform one of the following steps to enter information in the ACD(s): field:
  - Enter the name or number of the ACD directly into the field.
  - Use the history list to select an ACD.
  - Use the Browse button to select an ACD.

- 6. In the **Archiving type (Select any you wish):** check boxes, deselect the archives you do not want to view. If you want to view all archive types, leave the check boxes as check marked and proceed to the next step.
- 7. From the Actions menu, select List all.

Supervisor displays the Archiving Status - List All window.

ACD	Arch. type	Status	Date	Time	Next Sche	duled
ccgadads22	Interval	Finished	2000/09/21	3:41 PM		
ccqadads22	Daily	Finished	2000/09/21	12:42 AM	2000/09/22	12:35 AM
ccqadads22	Weekly	Finished	2000/09/17	2:35 AM	2000/09/24	2:35 AM
ccqadads22	Monthly	Finished	2000/08/01	4:36 AM	2000/10/01	4:35 AM

For more detailed information about the **Archiving Status - List All** window, see Description of the Archiving Status - List All window on page 536.

#### Note:

It is also possible to view the archiving status of all members of a single ACD Group using this procedure. Instead of the name or number of a single ACD, enter the name or number of the ACD Group in the **ACD**: field.

## Viewing the archiving status of all ACDs

#### Steps

To view the archiving status of all ACDs:

1. From the Controller window, select **Tools > Maintenance**.

Supervisor displays the Maintenance window.

🖗 Maintenance					? ×
Operations	Reports		Ì		
Operations:					
ACD Status					
Archiving Status Back Up Data					
Back up Data Backup/Restore Device:					
Connection Status	·				
Printer Administration					
Restore Data					
1					
<u>A</u> CD:					
Bison36vpe					
Script				Help	
<u></u> onpc					
		ОК	1	Cancel	
				Cancer	

- 2. Select the **Operations** tab.
- 3. Select Archiving Status in the Operations: list.
- 4. Select OK.

Supervisor displays the Archiving Status window.

Archiving Status	×
Actions Edit Help	
ACD(s):	
Archiving type (Select any you wish):	
🔽 Interval	
🔽 Daily	
🔽 Weekly	
Monthly	
	Bison36vpe

- 5. If the ACD(s): field is not clear; go to the Edit menu, and select Clear all.
- 6. Select the type of archives you want to view in the **Archiving type:** check boxes.
- 7. From the Actions menu, select List all.

Supervisor displays the Archiving Status - List All window.

ACD	Arch. type	Status	Date	Time	Next Sche	duled	٠
ccqadads22	Interval	Finished	2000/09/21	3:41 PM			
ccqadads22	Daily	Finished	2000/09/21	12:42 AM	2000/09/22	12:35 AM	
ccqadads22	Weekly	Finished	2000/09/17	2:35 AM	2000/09/24	2:35 AM	
ccqadads22	Monthly	Finished	2000/08/01	4:36 AM	2000/10/01	4:35 AM	
ccqadads21	Interval	Finished	2000/09/21	3:30 PM			
ccqadads21	Daily	Finished	2000/09/21	12:47 AM	2000/09/22	12:35 AM	
ccqadads21	Weekly	Finished	2000/09/17	2:35 AM	2000/09/24	2:35 AM	
ccqadads21	Monthly	Finished	2000/08/01	4:36 AM	2000/10/01	4:35 AM	
Bull_R8vpe	Interval	Finished	2000/09/21	3:30 PM			
Bull_R8vpe	Daily	Finished	2000/09/21	12:48 AM	2000/09/22	12:35 AM	
Bull_R8vpe	Weekly	Finished	2000/09/17	2:35 AM	2000/09/24	2:35 AM	
Bull_R8vpe	Monthly	Finished	2000/08/01	4:36 AM	2000/10/01	4:35 AM	
NonameR8vp	Interval	Finished	2000/07/27	1:28 PM			
NonameR8vp	Daily	Finished	2000/09/21	12:43 AM	2000/09/22	12:35 AM	
NonameR8vp	Weekly	Finished	2000/09/17	2:35 AM	2000/09/24	2:35 AM	-
NonameR8vp	Monthly	Finished	2000/08/01	4:36 AM	2000/10/01	4:35 AM	
jaeger5g3v5	Interval	Finished	2000/09/21	3:38 PM			
jaeger5g3v5	Daily	Finished	2000/09/19	12:46 AM	2000/09/22	12:35 AM	•

For more detailed information about the **Archiving Status - List All** window, see <u>Description of the Archiving Status - List All window</u> on page 536.

# **Description of the Archiving Status - List All window**

Jaeger1G32	Arch. type	Status	Date	Time	Next Sc	heduled
odogorrabz	Interval	Finished	2/21/98	2:27 PM		
Jaeger1G32	Daily	Finished	2/21/98	12:48 AM	2/22/98	12:35 AM
Jaeger1G32	Weekly	Finished	2/15/98	2:35 AM	2/22/98	2:35 AM
Jaeger1G32	Monthly	Finished	2/1/98	4:35 AM	3/1/98	4:35 AM
Jaguar4e34	Interval	Finished	2/21/98	2:24 PM		
Jaguar4e34	Daily	Finished	2/21/98	12:47 AM	2/22/98	12:35 AM
Jaguar4e34	Weekly	Finished	2/15/98	2:35 AM	2/22/98	2:35 AM
Jaguar4e34	Monthly	Finished	2/1/98	4:36 AM	3/1/98	4:35 AM
Bison36vpe	Interval	Finished	2/21/98	2:30 PM		
Bison36vpe	Daily	Finished	2/21/98	12:49 AM	2/22/98	12:35 AM
Bison36vpe	Weekly	Finished	2/15/98	2:35 AM	2/22/98	2:35 AM
Bison36vpe	Monthly	Finished	2/1/98	4:37 AM	3/1/98	4:35 AM
Trex35_vpe	Interval	Finished	2/21/98	2:28 PM		
Trex35_vpe	Daily	Finished	2/21/98	12:53 AM	2/22/98	12:35 AM
Trex35_vpe	Weekly	Finished	2/15/98	2:36 AM	2/22/98	2:35 AM
Trex35_vpe	Monthly	Finished	2/1/98	4:38 AM	3/1/98	4:35 AM
acd5	Interval	Finished	2/21/98	2:05 PM		
acd5	Daily	Finished	2/21/98	12:51 AM	2/22/98	12:35 AM
acd5	Weekly	Finished	2/15/98	2:36 AM	2/22/98	2:35 AM
acd5	Monthly	Finished	2/1/98	4:38 AM	3/1/98	4:35 AM
acd6	Interval	Finished	2/21/98	2:05 PM		

### **Field descriptions**

The following table lists the fields and the associated descriptions for the **Archiving Status - List All** window:

Field	Description
Status	The archiving status of the ACD.
Date	The date the last archive completed for the ACD.
Time	The time the last archive completed for the ACD.
Next scheduled	The date and time of the next-scheduled archive. Dates and times will not appear for the <b>Interval</b> archiving. <b>Interval</b> archives occur at the end of each interval: 15, 30, or 60 minutes.

# **Backup/restore devices**

Use the **Backup/Restore Devices** window 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.

The LAN Backup feature of CMS is not available through the Supervisor interface. For more information regarding this feature, see the Avaya Call Management System Release 12 LAN Backup User Guide, 585-215-721.

This section contains the following topics:

- Permissions on page 537
- Viewing a backup/restore device on page 538
- Listing all backup/restore devices on page 539
- <u>Adding a backup/restore device</u> on page 541
- Modifying a backup/restore device on page 542
- Deleting a backup/restore device on page 544

## **Permissions**

Depending on the procedure you wish to perform, you need the following permissions:

- You need *read* permission for the **Maintenance** subsystem to view the **Backup**/ **Restore Devices** window.
- You need *write* permission for the **Maintenance** subsystem to add, delete or modify any backup/restore devices.

## Viewing a backup/restore device

To view a backup/restore device:

1. From the Controller window, select **Tools > Maintenance**.

Supervisor displays the Maintenance window.

🖗 Maintenance				? >
Operations	Reports		)	
Operations: ACD Status Archiving Status Back Up Data Backup/Restore Devi Connection Status Printer Administration Restore Data	ces			
ACD: Bison36vpe Script				∎ <b>⊻</b> <u>H</u> elp
		OK		Cancel

- 2. Select the **Operations** tab.
- 3. Select Backup/Restore Devices in the Operations: list.
- 4. Select OK.

Supervisor displays the Backup/Restore Devices window.

Restore Devices	_ 🗆 🗙
Actions Edit Help	
Device name:	
Path:	
Description:	
Device type:	
SCSI cartridge tape - 4-8 GB	
O SCSI 8mm tape - 14 GB	
O SCSI 4mm or 8mm tape - 40 GB	
	ACD1

5. From the **Actions** menu, select **Find one**.

Supervisor displays the information for the first device.

Backup/Restore Devices	_ 🗆 🗙
Actions Edit Help	
Device name: default	
Path: /dev/mt/0c	
Description:	
Device type:	
SCSI cartridge tape - 4-8 GB	
🔿 SCSI 8mm tape - 14 GB	
🔿 SCSI 4mm or 8mm tape - 40 GB	
	ACD1

6. If more than one match is found, go to the **Actions** menu, and select **Next**. Repeat this step until all devices have been displayed.

## Listing all backup/restore devices

To list all backup/restore devices defined on the CMS server:

1. From the Controller window, select **Tools > Maintenance**.

Supervisor displays the Maintenance window.

Maintenance				?
Operations	Reports	Ì		
Dperations:				
ACD Status				
Archiving Status Back Up Data				
Backup/Restore Devic	es			
Connection Status				
Printer Administration Restore Data				
11000010 2 404				
ACD:				
Bison36vpe				
Script			<u>H</u> e	elp

- 2. Select the **Operations** tab.
- 3. Select Backup/Restore Devices in the Operations: list.

4. Select OK.

Supervisor displays the Backup/Restore Devices window.

_ 🗆 🗙
ACD1

5. From the Actions menu, select List all.

Supervisor displays a list of all devices.

on Device Type cartridge tape cartridge tape	Volume Capacity 14 GB 14 GB
cartridge tape	14 GB

## Adding a backup/restore device

To add a backup/restore device to the CMS server:

1. From the Controller window, select **Tools > Maintenance**.

Supervisor displays the Maintenance window.

Dperations	Rep	oorts	Ì		
Operations:					
ACD Status Archiving Status					
Back Up Data Backup/Restore [	Javicas				
Connection Status	:				
Printer Administrati Restore Data	on				
ACD:					
Bison36vpe				Ţ	
,	1				
Script				<u>H</u> el	P
			OK	Cano	-el

- 2. Select the **Operations** tab.
- 3. Select Backup/Restore Devices in the Operations: list.
- 4. Select OK.

Supervisor displays the Backup/Restore Devices window.

Restore Devices	_ 🗆 🗙
Actions Edit Help	
Device name:	
Path:	
Description:	
Device type:	
SCSI cartridge tape - 4-8 GB	
O SCSI 8mm tape - 14 GB	
🔿 SCSI 4mm or 8mm tape - 40 GB	
	ACD1

5. In the **Device name:** field, enter the name of the backup/restore device.

If you want to refer to your backup/restore device as ddrive1, enter **ddrive1** in the **Device name:** field.

6. In the **Path:** field, enter the full Solaris system path to access the device.

See the *Accessing devices* section in your *Solaris System Administrator's Guide* for more information about devices and paths.

- 7. In the **Description:** field, enter any additional information to help identify the device.
- 8. In the **Device type:** option list, select the correct tape capacity for your backup/restore device.

Selecting the correct capacity tape allows the system to estimate the number of tapes that will be needed to perform a full backup to the device.

9. From the Actions menu, select Add.

The device is defined through *CMS* and can be used for backup and restore operations.

## Modifying a backup/restore device

To modify the definition of a backup/restore device on the CMS server:

1. From the Controller window, select **Tools > Maintenance**.

Supervisor displays the Maintenance window.

🖗 Maintenance			?	>
Operations	Reports	)		
Operations:				
ACD Status Archiving Status Back Up Data Backup/Restore Devic	es			
Connection Status Printer Administration Restore Data				
400				
ACD: Bison36vpe			<b>-</b>	
<u>S</u> cript			Help	
		ОК	Cancel	

- 2. Select the **Operations** tab.
- 3. Select Backup/Restore Devices in the Operations: list.

#### 4. Select OK.

Supervisor displays the Backup/Restore Devices window.

Backup/Restore Devices	_ 🗆 ×
Actions Edit Help	
Device name:	
Path:	
Description:	
Device type:	
SCSI cartridge tape - 4-8 GB	
O SCSI 8mm tape - 14 GB	
C SCSI 4mm or 8mm tape - 40 GB	
	ACD1

- 5. Perform one of the following procedures to select the correct backup/restore device:
  - If you know the name of the device, enter the name of the device in the **Device name:** field and then press the **Enter** key.
  - If you do not know the name of the device, perform the following steps:
    - i. From the Actions menu, select Find one.
    - ii. If more than one match is found, select **Actions** > **Next**. Repeat this step until the device you want to modify is displayed in the dialog box.
- 6. Enter the new information in the fields that require modification.
- 7. From the Actions menu, select Modify.

The changes made to the device definition are saved.

## Deleting a backup/restore device

To delete the definition for a backup/restore device on the CMS server:

1. From the Controller window, select **Tools > Maintenance**.

Supervisor displays the Maintenance window.

Maintenance			? ×
Operations	Reports		
Operations: ACD Status Archiving Status Back Up Data Back up Data Connection Status Printer Administration Restore Data	es		
ACD: Bison36vpe Script			 ∐elp
		OK	Cancel

- 2. Select the **Operations** tab.
- 3. Select Backup/Restore Devices in the Operations: list.
- 4. Select OK.

Supervisor displays the Backup/Restore Devices window.

Reckup/Restore Devices	<u> </u>
Device name:	
Path:	
Description:	
Device type:	
SCSI cartridge tape - 4-8 GB	
O SCSI 8mm tape - 14 GB O SCSI 4mm or 8mm tape - 40 GB	
	ACD1

- 5. Perform one of the following procedures to select the correct backup/restore device:
  - If you know the name of the device, enter the name of the device in the Device name: field and then press the Enter key.
  - If you do not know the name of the device, perform the following steps:

- i. From the Actions menu, select Find one.
- ii. If more than one match is found, go to the **Actions** menu, and select **Next**. Repeat this step until the device you want to delete is displayed in the dialog box.
- 6. From the **Actions** menu, select **Delete**.

The specified backup/restore device definition is deleted from the CMS server.

# **Data Backup**

There are two types of data backup available through *CMS*, CMSADM and Maintenance. Avaya CMS can backup and restore while the data collection remains on. This ability helps minimize data loss. However, once a CMSADM backup is started, new logins through the ASCII interface, through Avaya CMS Supervisor, and through Avaya Visual Vectors are blocked. A maintenance restore of CMS System Administration data or ACD Administration data requires Avaya CMS to be in single-user mode.

The LAN Backup feature of CMS is not available through the Supervisor interface. For more information regarding this feature, see the Avaya Call Management System Release 12 LAN Backup User Guide, 585-215-721.

This section contains the following topics:

- CMSADM backup on page 546
- Maintenance backup on page 547
- Ordering tapes on page 547
- Things to consider when backing up or restoring data on page 547
- Performing a CMSADM backup on page 550
- Performing a maintenance backup on page 552
- Description of the Backup Data window on page 555
- <u>Common backup error messages</u> on page 557
- Labeling the backup volume on page 557
- Recovery kit on page 558

## **CMSADM** backup

The CMSADM backup saves all of the system data on the computer onto a tape.

The CMSADM backup includes the following data:

- Solaris system files and programs
- CMS programs
- Non-CMS customer data placed on the computer

The CMSADM backup will *not* save *CMS* database tables. For complete data recovery, both CMSADM and maintenance backups are required.

This type of backup is only performed through the *CMS* ASCII interface. A *Supervisor* interface for this type of backup is not available.

## Maintenance backup

Maintenance backups are used to archive and restore *CMS* data. If you do not have a backup, data is lost and cannot be recovered in the event of system or disk failure. The frequency of your backups is determined by how much data your contact center is willing to lose.

Through *Supervisor*, you can use the Backup Data operation on the **Maintenance** window to perform full and incremental backups of *CMS* historical and administration data.

## **Ordering tapes**

Avaya provides three blank tape cartridges with every new CMS system. You must obtain additional blank tapes and cleaning cartridges from a source other than Avaya such as a local office supply store or a mail-order computer supply store. Use the information in the following table to assist you in ordering replacement tapes.

Tape drive	Tape description	Generic name
DAT 72	36/72GB, 4mm, 170m	4mm DDS-5
	DDS cleaning cartridge	4mm cleaning cartridge
DDS-4	DDS4, 20/40GB, 4mm, 150m	4mm DDS-150
	DDS cleaning cartridge	4mm cleaning cartridge
Mammoth	20/40GB, 8mm, 170m	170m AME Mammoth
	8mm cleaning cartridge	Mammoth cleaning cartridge

## Things to consider when backing up or restoring data

Avaya recommends that you back up your CMS system data on a monthly basis and you back up your CMS ACD data on a daily basis. The backup tapes should be stored in a safe location, easily retrievable, correctly labeled, and replaced when worn out. Running system backups is no longer service affecting, but the backups will impact the performance of the CMS system. It is recommended that backups be run when CMS system activity is low.

This section presents several factors that will impact the amount of time it takes to backup or restore your data and presents options to reduce backup and restore times.

This section includes the following topics:

- Factors that impact backup and restore times on page 548
- Reducing tape backup and restore times on page 549
- Alternate methods for backing up and restoring data on page 549

### Factors that impact backup and restore times

The amount of time it takes to back up or restore data depends on the:

- Amount of data An increase in the amount of data will cause an increase in the amount of time it takes to back up or restore the data. Some factors that will increase the amount of data being stored are:
  - Number of items being measured CMS R3V9 and later have increased capacities. More data is generated if you measure 100,000 agent skill pairs instead of 10,000.
  - Number of days information is stored The greater the data storage time, the greater the amount of data that will have to be backed up or restored. When the CMS system reaches a predetermined threshold for data storage, the oldest record is deleted so that the newest record can be stored. Twice the amount of data is stored if you set your data storage for 62 days instead of 31 days.
  - Interval size Shorter intervals generate more data. A 15 minute interval will generate significantly more data than a 60 minute interval.
- System load Processes that require a large amount of system resources will slow down the CMS system. Backing up data requires a large amount of system resources. Additional processes that require a large amount of system resources are:
  - Running reports Running a single large report or multiple smaller reports will use a large amount of system resources.
  - Archiving data Archiving a large amount of data will use a large amount of system resources.
- Necessity for manually changing backup tapes If the amount of data exceeds the capacity of a single backup tape, someone must monitor the system and manually load additional tapes. A data backup or restore will not finish unless someone is able to load tapes into the tape device as needed.

The following table provides some examples of how the amount of data and the system load will impact the amount of time it takes to backup your data. You will see some variation in these values depending on your platform type and configuration.

Platform	System load (%)	Interval time (minutes)	Agent skill pairs	Data storage (GB)	Data backup time (hours)
Ultra 5	0	30	32,000	41.5	15.75
	30				19.87

Platform	System load (%)	Interval time (minutes)	Agent skill pairs	Data storage (GB)	Data backup time (hours)
Sun Blade 100	0	30	50,000	64.25	21.03
	30				30.76

### Reducing tape backup and restore times

If you do not take steps to optimize your CMS backup and restore times, you will begin to experience performance issues. Your CMS system performance will drop if the backup continues to run when contact center activity increases. With the increased CMS capacities that are now available, CMS backups and restores could take much longer to complete than they have in the past. To reduce the amount of time it takes to backup or restore data, you can:

- Select the maximum interval time that will meet your data collection needs.
- Select the minimum data storage times that will meet your data collection needs for all the historical database tables.
- Run reports when the CMS system is not actively backing up or restoring data.
- Schedule routine backups to occur at a time that is different from data archiving.
- Schedule routine backups to occur when CMS system activity is low.
- Reduce the amount of data being stored so only one backup tape is needed to store the data.
- Upgrade your CMS system to a more powerful hardware platform or add additional memory and CPUs.

### Alternate methods for backing up and restoring data

If you need a higher capacity process for backing up and restoring your data, you may want to use the Avaya CMS LAN Backup feature. The Avaya CMS LAN Backup feature provides an alternative to the traditional method of backing up and restoring data with a tape device. LAN Backup allows you to back up CMS data and system information over a local area network (LAN) to a storage manager.

Avaya Call Management System Release 12 LAN Backup User Guide, 585-215-721 provides information about using the CMS LAN backup feature, hardware requirements, software requirements, and support guidelines.

## Performing a CMSADM backup

The CMSADM backup should be done at the following times:

- Once a month (This is always the customer's responsibility.)
- After the CMS is provisioned (Never use the original tapes made during provisioning.)
- · Before and after the CMS software is upgraded
- After the system has been set up in the factory (performed by factory personnel).

This backup contains the default factory configuration. These tapes should be saved if the system must be reinstalled in the field.

### **A** Important:

Use a new set of backup tapes for the monthly CMSADM backup. Do NOT ever use the original sets of factory or provisioning backup tapes.

### Before you begin

The following items should be read and understood before beginning to work with tape drives and cartridges on your Sun Microsystems, Inc. *Solaris* system.

- Verify that you are using the correct tape for the tape drive on your system. Many of the tape cartridges look alike, and using the wrong tape can damage the tape drive mechanism and tape heads.
- Backup tapes can wear out. Be sure to refresh your supply of backup tapes at appropriate intervals.

### Permissions

In order to perform a CMSADM backup you need *write* permission for the **Unix (r)** subsystem. Only employees with administrative responsibilities should be given the permissions and passwords.

### Steps

1. Log into the *Solaris* system as *root* and open a terminal window.

See Logging in to CMS from the server console on page 612 for additional information.

2. Verify that the computer is in a *Solaris* multi-user state (2 or 3). To check if you are in the multi-user state, enter:

who -r

3. Enter the following command and press the Enter key:

#### lp /etc/vfstab

The system prints out the /etc/vfstab file.

The printed output is required if the backup is restored.

4. Enter the following command and press the **Enter** key:

#### cmsadm

#### The CMS Administration menu is displayed:

```
Avaya (R) Call Management System Administration Menu
Select a command from the list below.
1) acd_create Define a new ACD
2) acd_remove Remove all administration and data for an ACD
3) backup Filesystem backup
4) pkg_install Install a feature package
5) pkg_remove Remove a feature package
6) run_pkg Turn a feature package on or off
7) run_ids Turn Informix Database on or off
8) run_cms Trun CMS on or off
9) port_admin Administer Modems, Terminals, and Printers
10) passwd_age Set password aging options
Enter choice (1-10) or q to quit:
```

#### 5. Enter **3** to select the backup option.

Depending on the configuration of your system, one of the following outputs occurs.

a. If only one tape drive is available on the system, the program responds:

```
Please insert the first cartridge tape into <device name>
Press ENTER when ready or Del to guit:^?
```

b. If more than one tape drive is available for use by the system, the program will display output similar to the following example:

```
Select the tape drive:
1) <Exabyte EXB-8500 8mm Helical Scan>
2) <Archive QIC-150>
Enter choice (1-2):
```

6. Enter the appropriate selection from the displayed list.

#### The program responds:

```
Please insert the first cartridge tape into <device name>
Press ENTER when ready or Del to quit:^?
```

#### 7. Press the Enter key.

The backup process begins.

If more than one tape is required, the program displays the following message:

```
End of medium on "output".
```

```
Please remove the current tape, number it, insert tape number {\tt x}, and press Enter
```

If you receive the message displayed above, insert the next tape and allow it to rewind. When it is properly positioned, press the **Enter** key.

- 8. When the backup is completed, the program response varies according to the number of tapes used for the backup:
  - a. If the number of tapes required is one, the system responds:

```
xxxxxx blocks
Tape Verification
xxxxxx blocks
WARNING: A CMS Full Maintenance Backup in addition to this cmsadm backup
must be done to have a complete backup of the system. . . .
Please label the backup tape(s) with the date and the current CMS version
(rxxx.x)
```

b. If the number of tapes required is more than one, the system responds:

```
xxxxxx blocks
Tape Verification
Insert the first tape
Press Return to proceed :
```

If you receive the message displayed above, insert the first tape used in the backup and press the **Enter** key. Wait for the tape drive light-emitting diode (LED) to stop blinking before you remove the tape. When prompted, repeat this process for any additional tapes generated by the backup process.

The program verifies the backup, and then displays the output shown above.

9. Save the tapes and the vfstab printout until a backup restore is performed.

### Important:

Label all tapes with the tape number and the date of the backup. Set the tape write-protect switch to read-only.

## Performing a maintenance backup

Since new data is written each day, you should frequently back up this data. Both the full and incremental backups can be scheduled to run automatically on a timetable.

#### Before you begin

The following items should be read and understood before performing a Maintenance backup:

• A sufficient supply of tapes should be available so that tapes can be rotated. One common plan is to keep seven tapes in stock and recycle them daily. A new tape is used each day of the week, and each week the sequence is repeated.

- Backups run in the background. You can exit the **Backup Data** window without affecting the backup.
- Running backups during archiving may cause performance problems. For best performance, run backups either before or after the archiving process.
- Most systems come equipped with tape drives that can accommodate a full backup on one tape. Incremental backups may not need to be done. Full backups can be scheduled to run every day.

### **A** Important:

The maintenance backup does *not* back up the *CMS* software, *Solaris* system files or non-*CMS* customer data on the system. For complete data recovery, both CMSADM and maintenance backups are required. See <u>Performing a CMSADM backup</u> on page 550 for instructions on how to run a CMSADM backup.

### Permissions

To run a Maintenance backup you need write permission to the Maintenance subsystem.

#### Steps

1. From the Controller window, select **Tools > Maintenance**.

Supervisor displays the Maintenance window.

·	Reports				
			)		
Operations:					
ACD Status					- 1
Archiving Status Back Up Data					- 1
Backup/Restore Devices					- 1
Connection Status					- 1
Printer Administration Restore Data					- 1
					- 1
ACD:					
Bison36vpe					
<u>S</u> cript				<u>H</u> elp	
		01		Cancel	

- 2. Select the **Operations** tab.
- 3. Depending on if you want to back up a single ACD or all ACDs, choose one of the following steps:
  - To back up a single ACD, enter the ACD identification in the ACD: field.
  - To back up all ACDs, make sure no ACDs are selected in the ACD: field.
- 4. Select Backup data in the Operations: list.

5. Select OK.

Supervisor displays the Backup Data window.

🖉 Backup Data
Actions Edit Help
Backups completed today: 0
Status:
Errors:
Device name: deetil
Verify tape can be read after backup? : 🔽
ACD(s) to back up:
All ACDs     O Current ACD
Data to back up:
Local system administration data
CMS system administration data
ACD-specific administration data
Historical data,
Full     O Incremental
☑ Non-CMS data
Specific tables
ST10 //

- 6. In the **Device name:** field, verify that the correct backup device is displayed. If you need to select another device, select **List devices** from the **Actions** menu.
- 7. Ensure that the Verify tape can be read after backup?: check box is selected.

It is recommended that the tape backup be checked for readability. When the tape is being verified, a message displays in the **Status:** field. If the tape cannot be read a message displays in the **Errors:** field. See <u>Common backup error messages</u> on page 557 for information on additional error messages you may receive.

- 8. In the ACD(s) to back up: field, select one of the following options:
  - The All ACD(s) option will back up data from all real ACDs (not pseudo-ACDs).
  - The Current ACD option will back up data from the ACD that is displayed in the bottom right corner of the Backup Data window.
- The Data to back up: check boxes, by default, are all selected. If you do not want to back up the maximum amount of data, deselect the types of data you do not want backed up.

For an explanation of the **Data to back up:** check box options, see <u>Description of the</u> <u>Backup Data window</u> on page 555.

10. From the Actions menu, select Run.

The backup process begins. When the backup process is complete, *Supervisor* displays an acknowledgement window.

If your backup requires more than one tape, you will receive a message telling you to mount another volume to complete the backup.

11. When the backup completes, remove and label the tape(s).

## **Description of the Backup Data window**

This section includes the following topics:

- The Backup Data window on page 555
- Field descriptions on page 555
- Data to back up descriptions on page 556

### The Backup Data window

🖗 Backup Data	_ 🗆	×
Actions Edit Help		
Backups completed today: 0		
Status:		
Errors:		
Device name: cercuit		
Verify tape can be read after backup? : 🔽		
ACD(s) to back up:		
All ACDs     Current ACD		
Data to back up:		
Local system administration data		
CMS system administration data		
ACD-specific administration data		
Historical data,		
Full     O Incremental		
☑ Non-CMS data		
Specific tables		
	ST10	1.

### **Field descriptions**

Fields in the Backup Data window are described as follows:

Field	Description
Backups completed today	Shows the number of backups completed for the current day.
Status	Shows the status of the current or most recent backup and what is currently being backed up.
Errors	Shows any errors found in the backup.

Field	Description
Device name	Displays the name of the backup device.
Verify tape can be read after backup?	Check box to request that the data be reread to ensure that the data has been backed up properly.
ACD(s) to back up.	Options to perform a backup of all ACDs or a single ACD.
Data to back up.	Series of check boxes where you can select the types of data you want to back up. See <u>Data to</u> back up descriptions on page 556 for additional information.

### Data to back up descriptions

Descriptions of the types of data that may be backed up are described as follows:

Check Box	Description
Local System administration data	Includes IP addresses, port numbers, and other data configured at installation.
CMS System administration data	Includes user permissions, feature access permissions, <b>Main Menu</b> additional data, timetable, printer administration, default values, color choices, and custom report definitions (not the data associated with custom reports).
ACD-specific administration data	Includes Forecast data (if the feature is active), call work code administration data, VDN administration data, data storage allocation data, exception administration data, agent trace data (historical list of agents traced), and ACD-specific Dictionary names.
Historical data	Includes the historical data stored in the <i>CMS</i> database. There are two options for backing up historical data, Full and Incremental Full: includes data for all the time periods in the historical database. You must do a full backup before the first incremental backup. It is recommended that you periodically (for example, once a week) do a full backup of your system. Incremental: includes the <i>CMS</i> data recorded since the last backup (incremental or full) was completed. Only the historical data can be stored incrementally; administration data is stored in full.

Check Box	Description
Non-CMS data	Includes all data from <i>Informix</i> tables with names that start with c The table definitions for non- <i>CMS Informix</i> tables are not backed up, these would be captured by a CMSADM backup.
Specific tables	Allows you to back up data from specific data tables. To backup specific tables, select <b>Actions</b> > <b>Select tables</b> . <i>Supervisor</i> then displays the <b>Backup Data - Select Tables</b> window. The <b>Table name</b> column shows the name of the data table and the <b>Description</b> column shows the type of data in the table. Select the check boxes for the tables you want to back up. Close the window when finished.

## Common backup error messages

Common error messages and their solutions are described as follows:

Error	Solution
CMS cannot access the specified device.	Enter a new device name.
The volume mounted is bad (corrupt).	Mount a new volume.
A volume tape is not mounted in the drive.	Mount a volume.
The volume mounted contains CMS data that you might not want to overwrite.	Mount a different volume if you do not want to overwrite the data on the volume in the drive.
The volume mounted is the last backup volume.	You have to mount a different volume. Unless you direct <i>CMS</i> to do so, it does not let you overwrite your last backup.
The volume mounted has errors.	Mount another volume.
A table cannot be backed up.	You must decide if you want to skip the table and continue or cancel the backup.

## Labeling the backup volume

After a successful backup, CMS automatically generates a label for the backup volumes.

Depending on the circumstances, CMS provides the following information:

- An acknowledgement window displays the final backup information. If the backup was scheduled on a timetable, the information is recorded in the Maintenance Error Log.
- An acknowledgement window displays a message indicating when a backup can write to a previously used tape.

#### **Example** backup information format and interpretation

0001	CMS-	NNNNN	N-NN-	-LLL]	L-NN	-L-	-NN
0002							
0003	1	2	3	4	5	6	7

The following table provides information on the labels of backup tapes:

Part #	Code	Meaning
1	CMS	System name
2	NNNNN	Year, month and day of the backup (yymmdd)
3	NN	Number of backups for this day
4	LLLL	Type of data backed up: A - ACD-specific administration data and historical data C - custom data H - historical data L - local system administration data M - ACD-specific administration data S - CMS system data X - no backup
5	NN	Number of the ACD (00 means All ACDs were selected on the Back Up window)
6	L	Backup mode (F for Full, I for Incremental)
7	NN	The tape number if this tape was part of a multi-tape backup.

## **Recovery kit**

The recovery kit is composed of the backup media that the Avaya Technical Services Organization will need to restore service to your system if major problems occur. This kit should be stored in a secure location in order to minimize the time your system is out of service.

### **Recovery kit contents**

The Recovery Kit contains the most recent:

- CMSADM backup tape
- Full Maintenance backup tape and any Incremental backup tapes since the latest full backup
- CMS Load tape
- Patching CDs and tapes
- All the software packages that were shipped with the CMS system.

# **Restoring data**

Use the **Restore Data** window to restore *CMS* data that has been lost due to system failure, disk crashes, or power outages. You can restore all *CMS* data files that you have previously backed up. You can also select which ACDs and *CMS* data to restore.

The **automatic** restore will restore all *CMS* data files from your last backup. Most data is restored by the automatic restore procedure.

The **manual** restore will restore specific *CMS* data files. The manual restore is used only when a select number of database tables need to be restored. A manual restore gives you control over which data is restored.

This section contains the following topics:

- Before you begin on page 560
- Permissions on page 561
- <u>Automatic restore</u> on page 561
- Manual restore on page 563

## Before you begin

The following items should be read and understood before attempting to restore data:

- The Data Collection and CMS states must be set as noted for the following backups:
  - Local system administration data Data Collection off; CMS Single-user mode
  - CMS system administration data Data Collection on or off; CMS Single-user mode
  - ACD system administration data Data Collection on or off; CMS Single-user mode
  - Historical data, Non-CMS data, or specific tables Data Collection on or off; CMS Single- or Multi-user mode.
- Data must be backed up before it can be restored. To ensure the safety of your data, you should frequently back up your system.
- The restore procedure is run in the background. The **Status** field on the **Restore Data** window allows you to monitor the status of the restore process as it is performed.
- You can turn CMS back to multi-user mode when the Status field displays Restore is complete.

## Permissions

To restore data you need write permission for the Maintenance subsystem.

## **Automatic restore**

To have CMS automatically restore data from a backup:

1. From the Controller window, select **Tools > Maintenance**.

Supervisor displays the Maintenance window.

🔯 Maintenance			? ×
Operations	Reports	)	
Operations:			
ACD Status			
Archiving Status Back Up Data			
Backup/Restore Device	es		
Connection Status Printer Administration			
Restore Data			
J			
<u>A</u> CD:			
Bison36vpe			<b>-</b>
Script			Help
<u><u>s</u>cript</u>			
		ОК	Cancel
			Cancol

- 2. Select the **Operations** tab.
- 3. Select **Restore Data** in the **Operations:** list.

4. Select OK.

Supervisor displays the Restore Data window.

Restore Data	_ 🗆 X
Actions Edit Help	
Status:	
Errors:	
Device name: default	
Restore from last backup: 🗖	
Restore historical data from:	
Start date: Start time:	
Stop date: 🔄 Stop time:	
ACD(s) to restore:	
All ACDs     O Current ACD	
Data to restore:	
Local system administration data	
CMS system administration data	
ACD-specific administration data	
✓ Historical data	
☑ Non-CMS data	
Specific tables	
	ST13

The **Status:** field shows the status of the current restore or a previous restore if one has taken place.

The **Errors:** field will show any errors found during the restore.

5. Check the **Device name:** field to make sure the correct backup/restore device is selected.

If you want to use another backup/restore device, select **Actions** > **List devices**. Enter the correct backup/restore device name in the **Device name:** field.

This field defaults to the device named during installation.

- 6. Select the Restore from last backup: check box.
- 7. From the Actions menu, select Run.

The system notifies you which volumes to mount to restore the data. At the end of every restored volume, the tables that have been fully or partially restored will be displayed.

If the system asks for a tape that you cannot provide, you must cancel the restore process. The restore can be rerun if the tape is found.

## **Manual restore**

### **A** Important:

The manual restore stops when severe errors occur or when you tell it there are no more volumes to restore. Select **Stop** to tell the restore process that you are finished. Do not select **Cancel** since it implies an abnormal termination. Cancelling a restore leaves the data that has already been restored in the tables, which may result in the database being in an abnormal state. You will receive an acknowledgment window asking if you are sure you want to cancel the restore.

To manually restore data:

1. From the Controller window, select **Tools > Maintenance**.

Supervisor displays the Maintenance window.

)perations	Reports	)	
Operations:			
ACD Status Archiving Status			
Back Up Data			
Backup/Restore Devi Connection Status	ces		
Printer Administration			
Restore Data			
ACD:			
ACD: Bison36vpe			F
			 Help

- 2. Select the **Operations** tab.
- 3. Select **Restore Data** in the **Operations:** list.

#### 4. Select OK.

Supervisor displays the Restore Data window.

Restore Data	_ 🗆 ×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
Status:	
Errors:	
Device name: default	
Restore from last backup: 🗖	
Restore historical data from:	
Start date: Start time:	
Stop date: Stop time:	
ACD(s) to restore:	
All ACDs     Current ACD	
Data to restore:	
Local system administration data	
CMS system administration data	
ACD-specific administration data	
✓ Historical data	
✓ Non-CMS data	
Specific tables	
	ST13

The **Status:** field shows the status of the current restore or a previous restore if one has taken place.

The **Errors:** field will show any errors found during the restore.

5. Check the **Device name:** field to ensure that the correct backup/restore device is selected.

If you want to use another backup/restore device, select **Actions > List devices**. Enter the correct backup/restore device name in the **Device name:** field.

This field defaults to the device named during installation.

### Important:

Do not select the **Restore from last backup:** check box. A manual restore will accept any tape you mount as long as the data on the tape corresponds with the requested data.

- 6. In the **Start date:** field, enter the oldest date to be included in the restore by using one of the following methods:
  - Enter the date in the mm/dd/yy format.
  - Use the drop down calendar to select a date.
  - Enter the date in relative format; for example, 0 for today and -1 for yesterday.

7. In the **Start time:** field, enter the time you want to start restoring data. Use the format of **hh:mm XM** when entering the time where **hh** is hours, **mm** is minutes, and **XM** is AM or PM.

If you wanted to restore data starting at 1:15 AM, you would enter 01:15 AM

If AM or PM is not specified, a 24 hour clock is assumed.

- 8. In the **Stop date:** field, enter the most recent date to be included in the restore.
- 9. In the **Stop time:** field, enter the time you want to stop restoring data. Use the format of **hh:mm XM** when entering the time.
- 10. In the ACD(s) to restore options, select either All ACDs or Current ACD.
- 11. In the **Data to restore:** group, select the types of data you want to restore.
- 12. If you do not select **Specific tables**, go to Step 16. Otherwise, select **Actions > Select tables**.

Supervisor displays the Restore Data - Select tables window.

If you are performing the **Specific tables** restore, you cannot restore any other information at the same time. This includes:

- Local system administration data This data can only be restored once. A second attempt will corrupt data.
- CMS system administration data
- ACD system administration data
- Historical data
- 13. Select the tables you want to restore.
- 14. From the Actions menu, select Modify.
- 15. Close the **Restore Data Select tables** window to return to the **Restore Data** window.
- 16. From the Actions menu, select Run.

# **Connection status**

You can use the **Connection Status** window to monitor the data link between the *CMS* processor and the Communication Manager system. You can also view the current status of the application, session, and connection layers of the link between the Communication Manager system and *CMS*.

This section contains the following topics:

- Permissions on page 566
- Viewing the connection status of an ACD on page 566
- Listing the connection status of all ACDs on page 568
- Description of the Connection Status window on page 569

### **Permissions**

You need *read* permission for the **Maintenance** subsystem to view the **Connection Status** window.

## Viewing the connection status of an ACD

To view the connection status of a single ACD:

1. From the Controller window, select **Tools > Maintenance**.

Supervisor displays the Maintenance window.

👰 Maintenance			?	X
Operations	Reports	)		
Operations:				
ACD Status				
Archiving Status				
Back Up Data Backup/Restore Devices				
Connection Status				
Printer Administration				
Restore Data				
1				11
<u>A</u> CD:				
Bison36vpe			<b>•</b>	
				ı I.
<u>S</u> cript			Help	
		эк 🛛	Connel	
		Л	Cancel	

- 2. Select the **Operations** tab.
- 3. Select Connection Status in the Operations: list.
- 4. Select OK.

Supervisor displays the Connection Status window.

Connection Status       Actions     Edit       Help	×
ACD(s):	
Application:	
Session:	
Connection:	
Date/Time:	
Errors:	

5. In the ACD(s): field, enter the name or number of the ACD or ACD Group.

See <u>Description of the ACD Status window - with EAS</u> on page 529 or <u>Description of</u> <u>the ACD Status window - without EAS</u> on page 530 for additional information about the fields present on the **Connection Status** window.

6. From the Actions menu, select Find one.

Supervisor displays the Connection Status window for the selected ACD.

Connection Status	_ 🗆 ×
Actions Edit Help	
ACD(s): DECEMBER	
Application: data transfer	
Session: data transfer normal	
Connection: operational	
Date/Time: 2000/09/21 3:50 PM	
Errors:	
1 matches found	

## Listing the connection status of all ACDs

To list the connection status of all ACDs:

1. From the Controller window, select **Tools > Maintenance**.

Supervisor displays the Maintenance window.

🚱 Maintenance				? ×
Operations	Reports		)	
Operations: ACD Status Archiving Status Back Up Data Backup/Restore Devid Connection Status Printer Administration Restore Data	es			
ACD: Bison3Svpe Script				▼ <u>H</u> elp
		OK		Cancel

- 2. Select the **Operations** tab.
- 3. Select Connection Status in the Operations: list.
- 4. Select OK.

Supervisor displays the Connection Status window.

Connection Status Actions Edit Help	×
ACD(s):	
Application:	
Session:	
Connection:	
Date/Time:	
Errors:	

See <u>Description of the ACD Status window - with EAS</u> on page 529 or <u>Description of</u> <u>the ACD Status window - without EAS</u> on page 530 for additional information about the **Connection Status** window fields.

5. If the ACD(s): field is not clear, select Edit > Clear all.

6. From the Actions menu select List all.

Supervisor displays the Connection Status - List All window.

ACD	Application	Session	Connection	Date	Time
ccqadads22	data transfer	data transfer	operational	2000/09/21	3:52 PM
ccgadads21	data transfer	data transfer	operational	2000/09/21	4:33 PM
Bull R8vpe	data transfer	data transfer	operational	2000/09/21	4:04 PM
jaeger5g3v5	data transfer	data transfer	operational	2000/09/21	3:56 PM
NonameR8vp	not collecting data				
6	not collecting data				
7	not collecting data				
8	not collecting data				

# **Description of the Connection Status window**

Connection Status	×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
ACD(s):	
Application:	
Session:	
Connection:	
Date/Time:	
Errors:	

### **Field descriptions**

The Connection Status Window contains the following fields:

Field	Description	Status Messages
ACD(s)	Enter the number or name of the ACD(s) for which you would like to check the connection status.	-
Application	Displays status for the application layer of the link between the Communication Manager system and <i>CMS</i> .	<ul> <li>waiting session - The application layer is inactive. This is the state of the application layer when the system is first powered on.</li> <li>translation pumpup - CMS is receiving translations from the Communication Manager system. Translations are needed for CMS to correctly track the ACD calls coming from the switch.</li> <li>data transfer - The application layer can receive and transmit data successfully.</li> <li>not collecting data - Data collection has been turned off.</li> <li>CMS System Setup - The link has gone down. To resume data collection, use the Data Collection window</li> <li>busied out (switch) - The link between CMS and the Communication Manager system has been busied out from the switch side, usually to change switch translations.</li> </ul>
Session	Displays status for the session layer of the link between the Communication Manager system and <i>CMS</i> .	<ul> <li>quiescent - The session layer is inactive. This is the state of the session layer when the system is first powered on.</li> <li>waiting acceptance - The session layer is waiting for the connection layer to become operational and for the remote session layer to accept the session.</li> <li>data transfer - The session layer can now transmit and receive data from the Communication Manager system.</li> </ul>

Field	Description	Status Messages
Connection	Displays status for the connection layer of the link between the Communication Manager system and <i>CMS</i> .	<ul> <li>quiescent - Indicates that the connection is inactive. This is the state of the connection when the system is first powered on.</li> <li>out of order - Something is wrong with the connection to the Communication Manager system. For example, the network connection between the Communication Manager system and <i>CMS</i> is currently unavailable.</li> <li>operational - The connection can transmit information physically between the Communication Manager system and <i>CMS</i>.</li> <li>waiting session accept - The link is down.</li> </ul>
Date/Time	Displays the date/time for the ACD, unless the link to the ACD is down when <i>CMS</i> is brought up. If this happens, <i>CMS</i> uses the <i>Solaris</i> system time until the link is reestablished.	
Errors	Displays any errors found.	

# Administering a printer

Use the **Printer Administration** window to assign a name, description, and options to a printer that can be used by terminals connected to *CMS*. Users of *Supervisor* do not have access to printers assigned through this window but can use printers that are normally used through their Windows-based PC.

This section contains the following topics:

- Before you begin on page 572
- Permissions on page 572
- Adding a new printer on page 573
- Listing all printers on page 574
- Modifying printer options on page 576
- Deleting a printer on page 577

## Before you begin

- Before you can assign a printer in the **Printer Administration** window, the printer must already be administered in the *Solaris* system. See the *Avaya CMS Terminals, Printers, and Modems* document for additional information about the *Port Administration Tool.*
- The printer set up as the default printer will receive all terminal requested print jobs, unless otherwise specified by the user.
- If jobs are sent to a printer that is no longer administered, the print job will be sent to the default printer and an error will be logged in the Maintenance Error Log.
- The name of a printer administered in the Printer Administration window can be used by terminal users as the default destination when printing historical reports.

## Permissions

Depending on the procedure you want to perform, you will need the following permissions:

- To view the **Printer Administration** window, you will need *read* permission for the **Maintenance** subsystem.
- To add, delete, or modify the **Printer Administration** window, you will need *write* permission for the **Maintenance** subsystem.

## Adding a new printer

To add a new printer to the CMS server:

1. From the Controller window, select **Tools > Maintenance**.

Supervisor displays the Maintenance window.

Dperations	Reports	)		
Operations:	, i			
ACD Status				
Archiving Status Back Up Data				
Backup/Restore D	evices			
Connection Status Printer Administratic				
Restore Data	41			
ACD:				
-				
Bison36vpe				
			<u>▼</u> <u>H</u> elp	
Bison36vpe		οκ	<u>H</u> elp	

- 2. Select the **Operations** tab.
- 3. Select Printer Administration in the Operations: list.
- 4. Select OK.

Supervisor displays the Printer Administration window.

Printer Administration	
CMS printer name:	
LP printer name:	
Description:	
IBM graphics characters: 🔽	
Lines per page: 66	
Print type:	
Normal	
O Other,	
Banners:	
	ST10

5. In the CMS printer name: field, enter the name of the new printer.

The name assigned to the printer must be unique from all other installed printers; however, it can be assigned the same name it was given during the *Solaris* administration.

- 6. In the **LP printer name:** field, enter the name assigned to the printer when it was administered in *Solaris*.
- 7. In the **Description:** field, enter any additional information to identify the printer.
- 8. If the printer uses IBM graphic characters, select the **IBM graphic characters:** check box. Otherwise, leave the check box deselected.
- 9. In the **Lines per page:** field, enter the number of lines that fit on a page.

The default is 66 lines. CMS formats reports to correspond to the value in this field.

- 10. In the **Print type:** options select one of the following choices:
  - Select Normal (default setting)
  - Select Other. Then, in the corresponding field, enter the specific print type such as pica, elite, or compressed.
- 11. If you want a banner to be printed for every print job, select the **Banners:** check box.

A banner is a cover sheet that identifies the user who requested the print job.

12. From the Actions menu, select Add.

## Listing all printers

To list all printers defined on the CMS server:

1. From the Controller window, select **Tools > Maintenance**.

Supervisor displays the Maintenance window.

🖗 Maintenance				? ×
Operations	Reports	Ì		
Operations:				
ACD Status Archiving Status				
Back Up Data Backup/Restore Devices				
Connection Status				
Printer Administration Restore Data				
1				
ACD:				
Bison36vpe			-	
Script				Help
		OK		Cancel

- 2. Select the **Operations** tab.
- 3. Select Printer Administration in the Operations: list.

#### 4. Select OK.

Supervisor displays the **Printer Administration** window.

Rinter Administration	_ 🗆 ×
<u>Actions</u> <u>E</u> dit <u>H</u> elp	
CMS printer name:	
LP printer name:	
Description:	
IBM graphics characters:	
Lines per page: 66	
Print type:	
Normal	
O Other,	
Banners: 🗖	
	ST10

5. From the **Actions** menu, select **List all**.

Supervisor displays the **Printer Administration - List All** window.

Actions Edit Help										
CMS Printer Name	LP Printer Name	Description	IBM Chars	Length	Туре	Banners				
NulPrinter	NulPrinter	Room10	i n	66	normal	n				
ccqahp5n	ccqahp5n		n	66	normal	у				
test_printer	NulPrinter	Room1	y	66	normal	n				
3 matches found; per						I R8vpe				

## Modifying printer options

To modify the options for a printer currently existing on the CMS server:

1. From the Controller window, select **Tools > Maintenance**.

Supervisor displays the Maintenance window.

🖗 Maintenance			? ×
Operations	Reports		
Operations: ACD Status Archiving Status Back Up Data Backup/Restore Dev Connection Status Printer Administration Restore Data	vices		
ACD: Bison36vpe Script			▼ <u>H</u> elp
		OK	Cancel

- 2. Select the **Operations** tab.
- 3. Select Printer Administration in the Operations: list.
- 4. Select OK.

Supervisor displays the Printer Administration window.

Rinter Administration	- 🗆 ×
Actions <u>E</u> dit <u>H</u> elp	
CMS printer name:	
LP printer name:	
Description:	
IBM graphics characters:	
Lines per page: 66	
Print type:	
Normal	
O Other,	
Banners:	
	ST10

- 5. Perform one of the following procedures to select the correct printer:
  - If you know the name of the printer, enter the name of the printer in the CMS printer name: field, and then press the Enter key.

- If you do not know the name of the printer, perform the following:
  - i. From the Actions menu, select Find one.
  - ii. If more than one match is found, go to the **Actions** menu, and select **Next**. Repeat this step until the printer you want to modify is displayed.

#### **M** Important:

You cannot modify the name of a *CMS* printer. If you want to change a printer name, you must delete the printer and add it again with a new name. See <u>Deleting a printer</u> on page 577, and <u>Adding a new printer</u> on page 573 for more information.

- 6. Make changes to any of the fields in the **Printer Administration** window, except the **CMS printer name:** field
- 7. From the Actions menu, select Modify.

### **Deleting a printer**

To delete a printer currently defined on a CMS server:

1. From the Controller window, select **Tools > Maintenance**.

Supervisor displays the Maintenance window.

🖗 Maintenance		? ×
Operations Reports	\$	
Operations:		
ACD Status		
Archiving Status Back Up Data		
Backup/Restore Devices		
Connection Status Printer Administration		
Restore Data		
ACD:		
Bison36vpe		
Script		Help
	OK	Cancel

- 2. Select the **Operations** tab.
- 3. Select **Printer Administration** in the **Operations:** list.

4. Select OK.

Supervisor displays the Printer Administration window.

Printer Administration       Actions     Edit       Help       Printer Sign       Printer Sign	
CMS printer name:	
LP printer name:	
Description:	
IBM graphics characters: Lines per page: 66	
Print type:	
Normal     Other,	
Banners: 🗖	
	ST10

- 5. Perform one of the following procedures to select the correct printer:
  - If you know the name of the printer, enter the name of the printer in the CMS printer name: field, and then press Enter.
  - If you do not know the name of the printer, perform the following:
    - i. From the Actions menu, select Find one.
    - ii. If more than one match is found, go to the **Actions** menu, and select **Next**. Repeat this step until the printer you want to delete is displayed.
- 6. From the Actions menu, select Delete.

If you try to delete a printer that is assigned to users, you will receive a message asking if you still want to delete the printer.

Users assigned to this printer will not have another printer assigned when it is deleted.

## Maintenance Error Log

Use the Maintenance Error Log Report to aid you in working on system problems and to aid Services personnel in clearing problems from your system. The Maintenance Error Log displays a chronological list of warnings, information, and errors detected by *CMS*.

This section contains the following topics:

- Before you begin on page 579
- <u>Running a Maintenance Error Log</u> on page 580
- Severity of errors on page 582
- <u>Maintenance Error Log messages</u> on page 582

### Before you begin

The following items should be read and understood before working with the Maintenance Error Log:

- The Maintenance Error Log can contain 500 entries. When the log reaches 500 records the next record will overwrite the oldest record.
- The entries in the Maintenance Error Log are displayed in chronological order, starting with the most recent entry.
- You can search the log by error severity or by error code
- The results of all archives and backups are written to the Maintenance Error Log.
- If you have Avaya CMS Forecast, the results of the Forecast Manager are written to the Maintenance Error Log.

### **Running a Maintenance Error Log**

1. From the Controller window, select **Tools > Maintenance**.

Supervisor displays the Maintenance window.

🚱 Maintenance				?	×
Operations	Reports		Ì		
Operations:	·				
ACD Status Archiving Status					Ш
Back Up Data					Ш
Backup/Restore Device Connection Status	s				Ш
Printer Administration Restore Data					Ш
Hestore Data					Ш
					Ш
					Ш
					Ш
ACD:					Ш
Bison36vpe					Ш
<u>S</u> cript				Help	
		0	IK	Cancel	

- 2. Select the **Reports** tab.
- 3. Select Error Log Report in the Reports: list.
- 4. Select OK.

Supervisor displays the Maintenance Error Log window.

Maintenance Error	Log	X
Inputs		
ACD:		
Error codes:		
Severities:	All Severities	
Dates:		
Destination Vie <u>w</u> Report on So	creen	
C Print Report on:	ddops3	
	OK Cancel Help	

5. In the **ACD:** drop down list, enter the ACD on which you want to see an error log or select **All** to include all ACDs. Selecting an ACD Group shows the error logs for only the member ACDs of that group.

- If the Error codes: field is blank, all error codes are displayed in the error log report. If you only want the report to include specific error codes, enter the necessary codes in the Error codes: field.
- 7. In the **Severities:** drop down list, enter the severity of errors you want to see the report or select **All Severities** to include errors of any severity.

See <u>Severity of errors</u> on page 582 for additional information on error code classifications.

- 8. In the **Dates:** field, enter the amount of time that the report will include through one of the following methods:
  - Enter the date(s) in the MM/DD/YY format.
  - Use the history list to select the dates.
  - Use the Browse button to select the dates
  - Enter the date in relative format; for example, **0** for today, **-1** for yesterday.
- 9. Select one of the following **Destination:** options:
  - To display the Maintenance Error Log on the monitor, select **View Report on Screen**.
  - To send the Maintenance Error Log to a printer, select **Print Report**.
- 10. Select OK.

Supervisor displays the Maintenance Error Log Report.

Report	Edit Forma	t Tools C	ptions	Help		
Error Code	Date Occurred	Time Occurred	≢ Times Occur	ACD	Severities	Description
1711	09/26/2000	3;41 AM	2	1	INFO	BACKUP INFO: The backup has completed successfully. Please label the volume CMS-000926-01-LSAC-00-F-01-colflagg
1711	09/26/2000	3:22 AM	1	1	INFO	BACKUP INFO: This backup requires approximately 1 (0.05) volumes.
2000	09/26/2000	3:00 AM	1	3	INFO	Could not run limetable def_bull interval: Task 2 of 4 (taskid=3,appl_id=2003) was unable to complete. Reason: you have no permission for the acd or the vdn(s): 58401 but this field is required for the selected action
2600	09/26/2000	12:49 AM	1	4	INFO	ARCHIVER status: Daily Archive for (Mori) Sep. 25, 2000 Successful
2600	09/26/2000	12:48 AM	1	5	INFO	ARCHIVER status: Daily Archive for (Mon) Sep. 25, 2000 Successful
2600	09/26/2000	12:47 AM	1	1	INFO	ARCHIVER status: Daily Archive for (Mon) Sep. 25, 2000 Successful
2600	0005135160	12-13.04	1	3	INFO	ARCH0/ER ctatus: Daily Archive for /Mon) San 25, 2000, Successful

See <u>Maintenance Error Log messages</u> on page 582 for additional definitions for the possible error messages.

### Severity of errors

The following list describes the error classifications in the Maintenance Error Log:

- ALARM This type of entry could cause the system to crash or fail. You must work with Avaya Services to avoid the possibility of system failure.
- ERROR This type of entry needs immediate action. For example, a backup may not be working properly.
- INFO This type of entry does not need immediate action but is listed either to let you know that some aspect of the system is not operating correctly or to indicate the status of an operation. For example, **Successful**.

### Maintenance Error Log messages

The Maintenance error codes and related messages are organized by error code number. If any of the solutions do not resolve the problem you are experiencing, contact your *CMS* services representative. If a reference to a task number is shown in the Maintenance Error Log, give the number to the *CMS* services personnel.

The following table lists the possible error codes as well as the related information:

Error Code	Message	Reason/Action
500	UNIX error on OPEN, file: <filename></filename>	Could not write a file which is part of a timetable. One or more timetable tasks may be corrupted.
505	UNIX error on WRITE, file: File system may be out of space.	Error in writing the file. Potential file space problem.
505	The following two errors are found together: UNIX error on WRITE, file: SIGPIPE signal caught during printing, print request is incomplete or failed UNIX error on WRITE, file: lp. The user may have no default printer assigned and the UNIX(r) system administration for a default system line printer has not been done.	Could not print a file. The <i>Solaris</i> server probably does not have a default system line printer assigned, and the user probably does not have a <i>CMS</i> default printer assigned. Administer a default printer with <i>Solaris</i> . Select the <f3> key -&gt; <b>Options</b> -&gt; <b>default printer</b> to assign a default printer to a user. Ensure that the user has the appropriate permissions to the printer in the <b>User Permissions</b> subsystem.</f3>

Error Code	Message	Reason/Action
555	UNIX error on EXEC: Couldn't execute the following command: <user command=""></user>	System is too busy for command to be processed.
555	UNIX error on EXEC: CMS couldn't run because crt_io_man wouldn't execute	System is too busy for command to be processed.
556	UNIX error on FORK: CMS couldn't run because the system was too busy.	System is too busy for command to be processed.
556	UNIX error on FORK: UNIX process limit exceeded, system is too busy	<i>CMS</i> was unable to start a process. This will occur most likely if a user is logged into <i>CMS</i> through multiple terminals. Make sure each user logs in on only one <i>CMS</i> terminal/session at a time. If this message occurs when timetables are running, try adjusting the starting times of the timetables so that fewer are running simultaneously. If it occurs when running <b>Main Menu Additions</b> , try rewriting the <b>Main Menu Additions</b> to use fewer simultaneous <i>Solaris</i> processes.
556	UNIX error on FORK: Call records not being sent. Call Services.	The process for transferring external call records could not be started. Call Services.
557	UNIX call error: UNIX process limit exceeded. System is too busy	This error could occur for multiple reasons. Call services for assistance.
557	UNIX call error: uucp failed	The uucp file transfer mechanism for the External Call Records feature has failed. The system will automatically retry the transfer. If it fails repeatedly, call Services.
1001	UNIX error on NEW Agent upper bound has been reached. You have administered more Agent Exceptions than are allocated. You must either delete unneeded exceptions or allocate more space in System Setup: Data Storage Allocation.	The exception distributor process (ED) is attempting to log more agent exceptions than will fit in the storage space allocated for them. Delete unneeded exceptions or allocate more space in <b>System Setup &gt; Data</b> <b>Storage Allocation</b> .

Error Code	Message	Reason/Action
1001	UNIX error on NEW Split upper bound has been reached. You have administered more Split Exceptions than are allocated. You must either delete unneeded exceptions or allocate more space in System Setup: Data Storage Allocation.	The exception distributor process (ED) is attempting to log more Split exceptions than will fit in the storage space allocated for them. Delete unneeded exceptions or allocate more space in <b>System Setup &gt; Data</b> <b>Storage Allocation</b> .
1001	UNIX error on NEW Trunk group upper bound has been reached. You have administered more Trunk Group Exceptions than are allocated. You must either delete unneeded exceptions or allocate more space in System Setup: Data Storage Allocation.	The exception distributor process (ED) is attempting to log more Trunk Group exceptions than will fit in the storage space allocated for them. Delete unneeded exceptions or allocate more space in <b>System Setup &gt; Data</b> <b>Storage Allocation</b> .
1001	UNIX error on NEW VDN upper bound has been reached. You have administered more VDN Exceptions than are allocated. You must either delete unneeded exceptions or allocate more space in System Setup: Data Storage Allocation.	The exception distributor process is attempting to log more VDN exceptions than will fit in the storage space allocated for them. Delete unneeded exceptions or allocate more space in <b>System Setup &gt; Data</b> <b>Storage Allocation</b> .
1001	UNIX error on NEW Vector upper bound has been reached. You have administered more Vector Exceptions than are allocated. You must either delete unneeded exceptions or allocate more space in System Setup: Data Storage Allocation.	The exception distributor process is attempting to log more Vector exceptions than will fit in the storage space allocated for them. Delete unneeded exceptions or allocate more space in <b>System Setup &gt; Data</b> <b>Storage Allocation</b> .
1050	INFORMIX SQL syntax error:	The given SQL command is syntactically incorrect. Usually more details of the error are included. For customers, this error is reported via their custom report and is corrected there. For <i>CMS</i> , this is usually a software problem which may need reporting. Correct the SQL statement in the custom report.

Error Code	Message	Reason/Action
1053	INFORMIX insert error	An internal error or a full ACD dbspace is preventing data from being inserted into the ag_actv database table. Make sure that there is enough room in the ACD dbspace that holds the table.
1100	IPC error on messages: message queue queue is NN% full	This message is logged when a message queue is more than 75 percent full. Each message queue is checked approximately once every two minutes. If this message is repeatedly logged, <i>CMS</i> is in danger of losing messages that may result in loss of customer data. Single occurrences of this message can be ignored. If it happens repeatedly, contact services for assistance. Try reducing your <i>CMS</i> usage while this message is being logged to reduce the chances of losing data. If this message occurs while you are doing a <i>CMS</i> backup, try doing the backup during a less busy period.
1302	PROCESS COMMUNICATIONS (PO) library error, function: ERROR - <harch> receiving too many exceptions too fast. Some exceptions have been discarded. Reduce the number of active exceptions or change thresholds so that fewer exceptions are triggered.</harch>	Exceptions are being generated faster than interval archiver process can handle them. This is the result of having too many exceptions activated, or having thresholds set to produce too many exceptions. Reduce the number of active exceptions or change thresholds so that fewer exceptions are triggered.
1302	PROCESS COMMUNICATIONS (PO) library error, function: ERROR - <idbm> receiving too many exceptions too fast. Some exceptions have been discarded. Reduce the number of active exceptions or change thresholds so that fewer exceptions are triggered.</idbm>	Exceptions are being generated faster than intermediate database manager interface process can handle them. This is the result of having too many exceptions activated, or having thresholds set to produce too many exceptions. Reduce the number of active exceptions or change thresholds so that fewer exceptions are triggered.

Error Code	Message	Reason/Action
1302	PROCESS COMMUNICATIONS (PO) library error, function: ERROR - <spi> receiving too many exceptions too fast. Some exceptions have been discarded. Reduce the number of active exceptions or change thresholds so that fewer exceptions are triggered.</spi>	Exceptions are being generated faster than the switch interface process can handle them. This is the result of having too many exceptions activated, or having thresholds set to produce too many exceptions. Reduce the number of active exceptions or change thresholds so that fewer exceptions are triggered.
1350	GENERAL error internal to process: Unable to successfully complete archiving.	Unable to initialize <i>CMS</i> environment. Re-initiate Data Summarizing.
1350	GENERAL error internal to process: Failure in agent exception database table. Agent exception data not being stored. Call Services.	This error message is logged when the exception distributor process is unable to insert rows in the agent exception table. The error can occur when the ACD dbspace holding the agent exception table becomes full. No more agent exceptions can be recorded until the problem is corrected.
1350	GENERAL error internal to process: Failure in link exception database table. Link exception data not being stored. Call Services.	This error message is logged when the exception distributor process is unable to insert rows in the link exception (linkEx) table. The error can occur when the disk partition holding the link exception table becomes full. No more link exceptions can be recorded until the problem is corrected.
1350	GENERAL error internal to process: Failure in malicious call trace exception database table. MCT exception data not being stored. Call Services.	This error message is logged when the exception distributor process is unable to insert rows in the malicious call trace exception (mctEx) table. The error can occur when the disk partition holding the malicious call trace exception table becomes full. No more malicious call exceptions can be recorded until the problem is corrected. Call Services.
1350	GENERAL error internal to process: Failure in split exception database table. Split exception data not being stored. Call Services.	This error message is logged when the exception distributor process is unable to insert rows in the split exception (spEx) table. The error can occur when the disk partition holding the split exception table becomes full. No more split exceptions can be recorded until the problem is corrected. Call Services.

Error Code	Message	Reason/Action
1350	GENERAL error internal to process: Failure in trunk group exception database table. Trunk group exception data not being stored. Call Services.	This error message is logged when the exception distributor process is unable to insert rows in the trunk group exception table. The error can occur when the disk partition holding the trunk group exception table becomes full. No more trunk group exceptions can be recorded until the problem is corrected. Call Services.
1350	GENERAL error internal to process: Failure in VDN exception database table. VDN exception data not being stored. Call Services.	This error message is logged when the exception distributor process is unable to insert rows in the VDN exception (vdnEx) table. The error can occur when the disk partition holding the VDN exception table becomes full. No more VDN exceptions can be recorded until the problem is corrected. Call Services.
1350	GENERAL error internal to process: Failure in vector exception database table. Vector exception data not being stored. Call Services.	This error message is logged when the exception distributor process is unable to insert rows in the vector exception (vecEx) table. The error can occur when the disk partition holding the vector exception table becomes full. No more vector exceptions can be recorded until the problem is corrected. Call Services.
1350	GENERAL error internal to process: CMS task limit exceeded, system is too busy	This message means that a <i>CMS</i> task cannot be created because <i>CMS</i> is already running the maximum number of tasks. Make sure each user logs in to <i>CMS</i> only once. If this message occurs when timetables are running, try adjusting the starting times of the timetables so that fewer are running simultaneously. If it occurs when running <b>Main Menu</b> <b>Additions</b> , try rewriting the <b>Main Menu</b> <b>Additions</b> to use fewer simultaneous <i>Solaris</i> processes.
1350	GENERAL error internal to process: Update failure for <item searched=""> Too much data. Try again with a more restrictive search.</item>	Item searched for is too large. The search needs to be restricted further. Restrict the search to a smaller amount of data.

Error Code	Message	Reason/Action
1350	GENERAL error internal to process: disk may be full.	Error in searching for item. Disk may be full. Clean up unnecessary files from disk.
1350	GENERAL error internal to process: Failure in removing data from database table: ag_actv. Agent Trace data not being stored. Call Services.	An internal error occurred that prevents data from being deleted from the ag_actv database table. Call Services.
1351	GENERAL error in process interface: Invalid action request.	Something is corrupted with the window interface. Exit and re-enter the data summarizing window. Attempt to initiate data summarizing again.
1351	GENERAL error in process interface: Cannot archive a day which interval data does not exist for.	Interval data does not exist for the requested day or any day prior to the requested day. The number of days of interval data saved is based on the <b>Days</b> of Intrahour field set on the <b>Data</b> <b>Storage Allocation</b> window. Re-initiate Data Summarizing for a day that is within the number of <b>Days of</b> Intrahour saved. For future reference, the number of <b>Days of Intrahour</b> data can be increased. Disk space must be considered before changing this parameter.
1351	GENERAL error in process interface: Cannot archive the requested week/month. Daily data does not exist for all tables for the week/month beginning xx/xx/xx.	Daily data does not exist for the requested week/month or any week/ month prior to the requested day. The number of days of interval data saved is based on the <b>Days of Daily</b> field set on the <b>Data Storage Allocation</b> window. Re-initiate Data Summarizing for a week/ month that is within the number of <b>Days</b> <b>of Daily</b> saved. For future reference, the number of <b>Days of Daily</b> data can be increased. Disk space must be considered before changing this parameter. If the number of <b>Days of Daily</b> is changed and intrahour daily data is present for the days of the requested week/month, those days can be archived and the week/month can then be archived.

Error Code	Message	Reason/Action
1351	GENERAL error in process interface: ERROR - <arch> receiving too many archive requests too fast. Some requests have been discarded.</arch>	Too many data summarizing requests (more than 25) have been initiated in a short period of time (approx. 1/2 hour) and cannot all be processed. Determine all data summarizing requests that have been initiated. Once all requests have been processed, verify the requests against the completed archives (as reported in /cms/dc/archive/ arch.log). Re-initiate archive for the date and archive (daily/weekly/monthly) for the archives not initiated. In the future, do not initiate all requests at once.
1351	GENERAL error in process interface: Cannot archive a day in the future.	The date of the requested archive has not happened yet. Re-initiate the daily archive for a date prior to today.
1351	GENERAL error in process interface: Cannot archive a partial weeks/months data.	The last day for the week/month has not been archived yet. Verify that a weekly/monthly archive is not being requested for the current week/ month. That is, the end of the week/ month has not been reached yet. Re-initiate the weekly/monthly archive for a week/month in which the last day has already been archived.
1351	GENERAL error in process interface: stopping task id to free up message queue	A message queue is more than 85 percent full and the task that should be reading from the queue is apparently stuck. This message is logged when <i>CMS</i> restarts the task to attempt to clear the error condition. Depending on which task has been stopped, it is likely that some customer data has been lost. Report the problem to services. If this error is logged repeatedly, try reducing your <i>CMS</i> usage while this message is being logged to reduce the chances of losing data. If this message occurs while you are doing a <i>CMS</i> backup, try conducting the backup during a less busy period.

Error Code	Message	Reason/Action
1351	GENERAL error in process interface: External applications not started. Set to OFF	When the External Application feature was started, there was some general error. The feature was turned back off because of this error. Request help from your External Application provider (Avaya Professional Services Organization).
1351	GENERAL error in process interface: Activate Agent Trace request failed. Try again.	This error is logged when the agent activity recorder process (AAR) has too many messages in its message queue to accept any more. This can occur when many very active agents are being traced, keeping aar's queue full. Trace fewer agents or try this request again later.
1351	GENERAL error in process interface: Task < task_num> of timetable <name> may not have completed, window status was: <status></status></name>	Timetable ran and has a status other than <b>Successful</b> . Based on what the timetable was, examine the state of things (database, ACD administration, etc) to see if the request completed. If desired, complete the action manually by running <i>CMS</i> now.
1400	SPI session error: data collection session is down	An error has occurred in the X.25 connection to the switch. <i>CMS</i> data is not being collected. <i>CMS</i> will automatically try to restore the link. If the link does not re-establish by itself within five minutes, check the cables, modems, and other hardware between the <i>CMS</i> and the switch for any obvious loose connections.
1404	SPI configuration error: Insufficient unmeasured trunks allocated. To avoid further data loss, go to Data Storage Allocation and administer more unmeasured trunk facilities.	There are not enough unmeasured trunks allocated in the <i>CMS</i> realtime database to track all calls. This message is logged once during each data collection interval when the error condition occurs. When this message appears, some call data has already been lost. Data will continue to be lost until more trunk facilities have been allocated. Allocate more unmeasured trunk facilities in the <b>Data Storage Allocation</b> screen.

Error Code	Message	Reason/Action
1404	SPI configuration error: Switch and UNIX clocks differ by more than 24 hours. Switch clock is <nn:nn:nn nn=""> UNIX clock is <mm:mm:mm mm=""> Data collection will remain down until switch or UNIX clock is reset so they agree.</mm:mm:mm></nn:nn:nn>	<i>CMS</i> requires that the times on the Communication Manager and Solaris systems remain within 24 hours of each other. This is done to prevent an accidental deletion of all historical data if someone were to inadvertently change the clock to a date far into the future. If the Solaris clock is correct but the Communication Manager clock is incorrect, reset the clock at the switch. <i>CMS</i> will bring the link up automatically within five minutes after correcting the switch clock.
1404	SPI configuration error: Extension <number> has been staffed by two different login IDs: <first> and <second>. Data will be tracked only for the last login ID. Ask the agent to log off and log in again with a single login ID.</second></first></number>	Protocol error as explained in the message. Ask the agent to log off and log in again with a single login ID.
1404	One of the following messages will be displayed depending on the switch configuration: Two agents at extensions <ext>in split <num> and <ext>in split <num> are logged in with the same login ID: <id> This may indicate table corruption on the switch. Contact Services to repair table as soon as possible. Two agents at extensions <ext> and <ext>are logged in with the same login ID: <id>. This may indicate table corruption on the switch. Contact Services to repair table as soon as possible.</id></ext></ext></id></num></ext></num></ext>	Protocol violation or switch corruption. Try requesting new translations in <b>Maintenance: ACD Status</b> screen. If the problem persists, call Services.

Error Code	Message	Reason/Action
1404	One of the following messages will be displayed depending on the switch configuration: SPI configuration error: Agent <logid> at extension <ext>has logged into too many splits: <spl>, and <sp2>. Data will only be tracked for the last split. This may indicate incorrect switch type on CMS for G3. SPI configuration error: Agent <logid> at extension <ext> has logged into too many splits: <spl>, <sp2>, <sp3>, and <sp4> . Data will only be tracked for the last split. This may indicate incorrect switch type on CMS for G3. SPI configuration error: Agent <logid> at extension <ext> has logged into too many splits: <spl>, <sp2>, <sp3>, and <sp4> . Data will only be tracked for the last split. This may indicate incorrect switch type on CMS for G3. SPI configuration error: Agent <logid> at extension <ext> has logged into too many splits: <sp1>, <sp2>, <sp3>, <sp4>, and <sp5>. Data will only be tracked for the last split. This may indicate incorrect switch type on CMS for G3.</sp5></sp4></sp3></sp2></sp1></ext></logid></sp4></sp3></sp2></spl></ext></logid></sp4></sp3></sp2></spl></ext></logid></sp2></spl></ext></logid>	Switch type mismatch, protocol violation or switch table corruption. Try requesting new translations in <b>Maintenance: ACD Status</b> screen. If the problem persists, call Services.
1406	SPI data message error: ERROR can't new a message (or got illegal opcode)	This generally indicates that there is a mismatch between the administered <i>CMS</i> type on the Communication Manager system and the actual <i>CMS</i> or there is a mismatch between the administered switch type and feature set of the switch on the <i>CMS</i> . This results in message formats being of unexpected lengths. Data is lost since the remainder of the buffer is discarded after the unknown message. Determine if the problem happens more than once. Call Services.
1407	SPI timer expired error: there is no response from the switch	<i>CMS</i> has stopped receiving messages from the Communication Manager system. <i>CMS</i> data is not being collected. <i>CMS</i> will automatically try to restore the link. At the switch, perform a busy out and release the MIS connection.

Error Code	Message	Reason/Action
1409	SPI ACD administration error: switch was unable to logon agent <logid> with skill <num></num></logid>	For some reason the login failed on the switch. This login may have been part of a <b>Move Agent</b> or <b>Change Agent Skills</b> request which was pending. Have the agent try to log in to the skill again. Or put the agent in the AUX workmode for all skills and have no calls on their set. Repeat the administration request. If the request fails again, collect the information from the status window for Services.
1409	One of the following messages will be displayed: SPI ACD administration error: switch unable to move ext <ext> from split <num> to <num> SPI ACD administration error: switch unable to move ext <ext> from split <num></num></ext></num></num></ext>	Previous ACD administration request for moving an agent or changing an agent's skills was pending. When the pending was resolved, the agent could not be moved for some reason. Put the agent in the AUX workmode for all split/skills and have no calls on their set. Repeat the administration request. If the request fails again, collect the information from the status window for Services.
1501	SCREEN MANAGER error: system may be overloaded by real time reports behind by XX seconds.	<i>CMS</i> is behind on refreshing the real-time reports currently running. Run fewer real-time reports or lengthen refresh rates for the reports currently running.
1600	FORECAST status: Forecast Manager failed for mm/dd/yy	Forecast Manager failed in its attempt to perform the daily data collection and/or the current day report for mm/dd/yy. If the date is invalid, correct the date and rerun the report. If it is not a problem with the date, call Services for assistance.
1600	FORECAST status: Forecast Manager failed for mm/dd/yy - mm/dd/yy	Forecast Manager failed in its attempt to perform the recollect data for a range of dates mm/dd/yy - mm/dd/yy. The first date is the start date and the second date is the stop date. If the dates are invalid, correct the date and rerun the report. If it is not a problem with the date, call Services for assistance.

Error Code	Message	Reason/Action
1700	BACKUP Process out of sync. Contact Services.	A bad message was received from the backup screen. If this occurs, some sort of interference may have occurred in the message queue between the backup process and backup screen. If the problem re-occurs, something is impacting the communication between the processes. Further investigation is necessary to determine the source of the problem. Exit the current instance of the backup screen and re-initiate the backup. Verify that the problem does not re-occur.
1701	BACKUP Process out of memory. Contact Services.	If this error occurs, it is when the tape is being verified, but after the backup has already completed successfully. If tape verification is not essential, no further action is necessary. This error indicates a problem with memory allocation. Exit the current instance of the backup screen and re-initiate the backup. Verify that the problem does not re-occur.
1702	BACKUP Process startup failed. Contact Services	Any number of startup activities could cause this problem. Most are message and database activities that should never be encountered. If the problem re-occurs, something is peculiar in the environment of the backup process and further investigation is necessary to determine the source of the problem. Exit the current instance of the backup screen and re-initiate the backup. Verify that the problem does not re-occur.
1703	BACKUP Volume access failed. Retry Backup.	<ul> <li>A problem accessing the backup device has occurred. This problem could range from an invalid backup device to the tape drive requiring cleaning.</li> <li>Verify the following: <ul> <li>The backup device is administered properly (name corresponds with solaris administered device)</li> <li>The tape compatibility is correct(320 meg tape for 320 meg drive, etc.).</li> <li>The tape drive is clean.</li> </ul> </li> </ul>

Error Code	Message	Reason/Action
1704	BACKUP Volume check failed. Retry Backup.	Either the inserted tape is a recent backup and backup was initiated in timetable or backup had difficulty determining the most recent backup (either full or incremental) volume. Determine if the inserted tape is associated with the most recent backup (full or incremental). Replace the tape and re-execute backup (or services run br_check).
1705	BACKUP Volume verification failed. Retry Backup.	A problem reading the tape exists. Exit the current instance of the backup screen and re-initiate the backup. Verify that the problem does not re-occur.
1706	BACKUP Table backup failed. Retry Backup. Table=	A problem was encountered either reading the indicated table or writing that table to tape. Replace the tape with a new tape (after verifying no problems with the indicated table) and re-execute the backup process. Verify that the problem does not re-occur.
1707	BACKUP Volume span failed. Retry Backup	When verifying the backup tape, a problem was discovered between the current volume and the previous volume. Most likely, the blocks are out of sequence. More specifically, at least 1 block is missing. Re-execute the backup process. Verify that the problem does not re-occur.
1708	BACKUP Error in process communication. Retry Backup.	This should never be encountered. A bad message was received from the backup screen (or erroneously from another process). If this occurs, some sort of interference occurred in the message queue between the backup process and backup screen. If the problem re-occurs, something is impacting the communication between the processes. Further investigation is necessary to determine the source of the problem. Exit the current instance of the backup screen and re-initiate the backup. Verify that the problem does not re-occur.

Error Code	Message	Reason/Action
1709	BACKUP Backup history update failed. Retry Backup.	This should never be encountered. The backup was completed successfully. A problem exists with the update tables or the process to update the tables. Verify that the next backup does not encounter this problem.
1710	BACKUP Process in need of service. Please check the Backup screen.	An acknowledgement window is requiring a response. Respond to the backup acknowledgement window.
1711	INFO Warning backup waited 210/ 7200 seconds before archive completed.	The backup process waited 210 seconds for the current archiving process to finish. Backups should not be run during the archiving process. If this occurs consistently, consider rescheduling your archiving and backup processes so that overlap does not occur.
1711	ERROR backup terminated because archive did not complete within 2 hours.	The backup process waited two hours for the archiving process to be completed and was terminated as a result. Backups should not be run during the archiving process. Reschedule the backup and archiving processes so that simultaneous processing does not occur.
1711	BACKUP INFO:	Backup was initiated through a timetable and information is reported (number of volumes and backup completed) simply for information purposes. No action required
1750	BACKUP Screen startup failed. Contact Services.	Any number of startup activities could cause this problem. Most problems deal with accessing screen entries and database activities that should never be encountered. If the problem re-occurs, something is peculiar in the environment of the backup process. Further investigation is necessary to determine the source of the problem. Exit the current instance of the backup screen and re-initiate the backup. Verify that the problem does not re-occur.

Error Code	Message	Reason/Action
1751	BACKUP Screen execution failed. Retry Backup.	Any number of startup activities could cause this problem. Most problems deal with accessing screen entries and database activities that should never be encountered. If the problem re-occurs, something is peculiar in the environment of the backup process. Further investigation is necessary to determine the source of the problem. Exit the current instance of the backup screen and re-initiate the backup. Verify that the problem does not re-occur.
1800	RESTORE Process out of sync. Contact Services.	A bad message was received from the restore screen. If this occurs, some sort of interference occurred in the message queue between the restore process and restore screen. If the problem re-occurs, something is impacting the communication between the processes. Further investigation is necessary to determine the source of the problem. Exit the current instance of the restore screen and re-initiate the restore. Verify that the problem does not re-occur.
1801	RESTORE Process out of memory. Contact Services.	A problem with memory allocation exists. Exit the current instance of the restore screen and re-initiate the restore. Verify that the problem does not re-occur.
1802	RESTORE Process startup failed. Contact Services	Any number of startup activities could cause this problem. If the problem re-occurs, something is peculiar in the environment of the restore process and further investigation is necessary to determine the source of the problem. Exit the current instance of the restore screen and re-initiate the restore. Verify that the problem does not re-occur.

Error Code	Message	Reason/Action
1803	RESTORE Volume access failed. Retry Restore.	<ul> <li>A problem exists accessing the restore device. This could be an invalid restore device, the tape drive requiring cleaning, or a table header format problem (internal error).</li> <li>Verify the following:</li> <li>The backup/restore device is administered properly (name corresponds with Solaris administered device).</li> <li>The tape compatibility is correct (320 meg tape for 320 meg drive, etc.).</li> <li>The tape drive is clean.</li> </ul>
1804	RESTORE Error in process communication. Retry Restore.	A bad message was received either by the restore screen or the restore process. If this occurs, some sort of interference occurred in the message queue between the restore process and the restore screen. If the problem re-occurs, something is impacting the communication between the processes. Further investigation is necessary to determine the source of the problem. Exit the current instance of the restore screen and re-initiate the restore. Verify that the problem does not re-occur.
1805	RESTORE Table restore failed. Retry Restore. Table=	A problem was encountered either reading the indicated table from tape or writing that table into the database. Perform a specific table restore for the indicated table. Verify that the problem does not re-occur.
1806	RESTORE INFO: Volume contains no data for ACD=X	This is an Information message indicating that the current table for the indicated ACD does not have data. No action required.
1850	RESTORE Screen startup failed. Contact Services.	Any number of startup activities could cause this problem. Most problems result from accessing screen entries that should never be encountered. If the problem re-occurs, something is peculiar in the environment of the restore process and further investigation is necessary to determine the source of the problem. Exit the current instance of the restore screen and re-initiate the restore. Verify that the problem does not re-occur.

Error Code	Message	Reason/Action
1851	RESTORE Screen execution failed. Retry Restore.	Updating the status on the screen could cause this problem (although extremely rare). If the problem re-occurs, something is peculiar in the environment of the restore process and further investigation is necessary to determine the source of the problem. Exit the current instance of the restore screen and re-initiate the restore. Verify that the problem does not re-occur.
1900	SYSTEM MESSAGE OVERLOAD: Agent Trace (AAR) is overloaded, some agent trace data lost. Turn off traces for some agents to prevent possible further overloading.	AAR is receiving messages faster than it can process them. Turn off traces for some agents.
1900	SYSTEM MESSAGE OVERLOAD: Call History Recorder (ch_rec) overloaded, some call record data lost.	Data is being sent faster than it can be processed. This usually indicates that the system as a whole is overloaded. Stop some reports or applications so that the system capacity is increased.
1901	FULL DISK ERROR: Out of disk space. Data Collection failed (Archiver).	Enough disk space is not available for the insertion of daily/weekly/monthly archive data. Free up disk space or add more disk space in the form of additional hard disks.
1901	FULL DISK ERROR: Out of disk space. Harchiver could not write to <tablename>.</tablename>	Enough disk space is not available for the insertion of agent login/logout or interval archive data. Free up disk space or add more disk space in the form of additional hard disks. If the problem persists, call Services.
1901	FULL DISK ERROR: cannot write to xxx.	The filesystem or ACD dbspace is out of disk space. Use <b>Free Space Allocation</b> and/or <b>Data Storage Allocation</b> to adjust the amount of space available to the ACD.
1901	FULL DISK ERROR:	There is no more disk space to load the data for this pseudo-ACD. The load ACD process cannot continue. Delete the pseudo-ACD and start over again using a later "Start date" for the pseudo-ACD and load less data. Reduce the amount of historical data kept in other ACDs.

Error Code	Message	Reason/Action
1901	FULL DISK ERROR: Automatically turning off data collection and bringing CMS to single user mode	All ACD dbspaces are checked for free space every 10 minutes. By turning off data collection and going to single user mode, <i>CMS</i> prevents corruption of the data that may occur if IDS tries to write data to a full ACD dbspace. <i>CMS</i> cannot be returned to its normal operational state until space has been made available in the ACD dbspace. Use Free Space Allocation and/or Data Storage Allocation to adjust the amount of space available to the ACD.
1901	FULL DISK ERROR: WARNING: File system <filesys> is <nn> percent full.</nn></filesys>	This message is logged once each day near midnight and whenever <i>CMS</i> is started. The message is logged once for each file system or ACD dbspace that is at or beyond 80 percent of maximum capacity. This message is intended as an early warning that disk space may need to be reallocated. No immediate action is necessary. Eventually, you should use <b>Free Space</b> <b>Allocation</b> to allocate more space to the ACD dbspace. You should plan to do this well in advance of the ACD dbspace or file system becoming completely full.
1901	FULL DISK ERROR: Storage Interval Migration failed migrating	The disk or ACD dbspace is out of space. Use <b>Free Space Allocation</b> or <b>Data</b> <b>Storage Allocation</b> to adjust the amount of space available to the ACD.
1901	FULL DISK ERROR	The dbspace containing the ag_actv database table is full. Change the allocation of disk space for the various classes of data to accommodate storage of more agent trace records.
1901	FULL DISK ERROR: Out of disk space. Call Records not recorded.	The dbspace containing the call_rec database table is full. Change the allocation of disk space for the various classes of data to accommodate storage of more internal call records.
1901	FULL DISK ERROR: Call Records not being stored. Call Services.	The dbspace containing the external call records files is full. Call Services.

Error Code	Message	Reason/Action		
1902	CALL RECORD ERROR: Call Records not being stored. Call Services.	An error was encountered in writing call records to a disk file. Call Services		
1902	ALL RECORD ERROR: Call Records are being collected again.	Previous errors writing files have been cleared and records are again being stored. No action necessary.		
1902	CALL RECORD ERROR: Call Records not being stored, buffer area is full. Call Services			
1902	CALL RECORD ERROR: Call rate exceeded capacity: xxx calls not transmitted	The internal Call History feature is activated but the call rate exceeds the maximum capacity handled by this feature; therefore, call records are not being sent to the Call History feature. This message indicates how many calls were not sent in the past data collection interval. This has no effect on the collection of regular data. Call Services.		
2000	Could not run timetable: - Aborting Timetable. <timetable name&gt;</timetable 	Something is wrong with the timetable which is not allowing properly functionality. Try rescheduling the timetable. Consult this document for information on using timetables to see if there are erroneous tasks in the timetable.		
2000	Could not run timetable: <timetable name=""> Task <number> of <total> was unable to complete. Reason: <reason></reason></total></number></timetable>	A timetable task is in error. One common possibility is that the user does not have permissions for the split, vdn, etc. for which they are running reports.		

Error Code	Message	Reason/Action		
2000	Could not run timetable: don't run timetable, in single user timetable = <timetable_name> <user_name></user_name></timetable_name>	Timetables cannot run when <i>CMS</i> is in single user mode. An administrator has put <i>CMS</i> in single user mode as required by some special administrative tasks. The severity of the problem is that the user's timetables are not being run when expected. Schedule the timetables that should have run to be performed as soon as possible and then reschedule those timetables back to their original times. Schedule their timetables to run at a time that does not conflict during the time when <i>CMS</i> needs to be in single user mode.		
2000	Could not run timetable: sorry post office open of timetable crt_io_man was not successful for timetable - <timetable name&gt; and <cms id=""> - <user name&gt;.</user </cms></timetable 	Communications cannot be established with a crt_io_man in order to run the timetable. Try rescheduling the timetable.		
2000	Could not run timetable: Archiver <timetable name=""> did not run on <date> for the user - <user name="">. Please schedule it to rerun using the Data Summarizing screen.</user></date></timetable>	The Archiver has a problem in moving historical data into tables for the timetable to use. Call Services.		
2000	Could not run timetable: Archiver <timetable name=""> did not run on <date> for the user - <user name&gt;. To schedule a timetable to run as soon as possible, enter a cms start time that is two minutes into the future, and a start date of 0.</user </date></timetable>	A user scheduled a timetable to run in less than two minutes into the future. Reschedule the timetable for at least two minutes into the future.		
2100	Unable to execute <process>. <impact-description>.Call Services.</impact-description></process>	The specified process could not be executed. The impact is usually the failure of a major component of <i>CMS</i> such as Agent Trace, Exceptions, or Data Collection. This problem can usually be repaired by stopping <i>CMS</i> and restarting it. Call Services.		
2200	Sometimes the problem can be repaired by stopping CMS and restarting it.	An error was encountered during migration. Call services for assistance.		

Error Code	Message	Reason/Action		
2300	INTERVAL MIGRATION: Interval migration was canceled before it completed. Restart it from the Storage Intervals screen to complete the migration	The migration was canceled manually before it completed. Restart the migration from the <b>Storage</b> <b>Intervals</b> screen.		
2300	INTERVAL MIGRATION: Migrating intrahour historical data for ACD xx from xx to yy minute interval is complete.	This message indicates when intrahour migration is complete. No action required.		
2400	FREE SPACE ALLOCATION: <error message&gt;</error 	This type of error message specifies that the <b>Free Space Allocation</b> feature has suffered a problem in locating or updating database tables. Contact services.		
2500	STORAGE INTERVALS: Weekly start/stop day(s) have been changed from xx to yy.	This is an informational message indicating that the Storage Interval days have changed. Verify that the new days are correct.		
2600	ARCHIVER status: Daily/Weekly/ Monthly Archive not executed for xx/xx/xx due to Data Storage Allocation administration.	Data Storage Allocation indicates 0 days/weeks/months are to be saved; therefore, no reason to archive data exists. This is most commonly a result of an error in user input. If daily archives are desired, Data Storage: Days of Daily/Weeks of Weekly/Months of Monthly entry(ies) must be changed to allow an archive to take place. Disk space must be considered before changing these fields.		
2600	ARCHIVER status: Daily/ Monthly/Weekly Archiver for xx/ xx/xx Successful.	Indicates successful completion of the daily/weekly/monthly archive. The status of previous and current archives also exists in /cms/dc/archive/ arch.log. No action necessary.		
2600	ARCHIVER status: Daily/ Monthly/Weekly Archiver for xx/ xx/xx Failed.	Indicates failure of the daily/weekly/ monthly archive. The status of previous and current archives also exists in /cms/ dc/archive/arch.log. Re-initiate an archive for the same date and archive type (daily/weekly/monthly) using the CMS System Setup:Data Summarizing screen.		

Error Code	Message	Reason/Action
2700	MIGRATE DATA Process out of sync. Call Services.	A bad message was received from the <b>R3</b> <b>Migrate</b> screen. If this occurs, some sort of interference occurred in the message queue between the R3 Migrate process and the associated screen. If the problem re-occurs, something is impacting the communication between the processes. Further investigation is necessary to determine the source of the problem. Exit the current instance of the <b>R3</b> <b>Migrate</b> screen and re-initiate the migration. Verify that the problem does not re-occur.
2701	MIGRATE DATA Process out of memory. Contact Services.	A problem with memory allocation has occurred. Exit the current instance of the <b>R3</b> <b>Migrate</b> screen and re-initiate the migration. Verify that the problem does not re-occur.
2702	MIGRATE DATA Process startup failed. Contact Services	Any number of startup activities could cause this problem. If the problem re-occurs, there is an error in the environment of the migrate process and further investigation is necessary to determine the source of the problem. Exit the current instance of the <b>R3</b> <b>Migrate</b> screen and re-initiate the migration. Verify that the problem does not re-occur.
2703	MIGRATE DATA Volume access failed. Retry Restore.	<ul> <li>A problem exists accessing the migration device. This could range from: <ul> <li>Invalid migration device</li> <li>Tape drive needs cleaning</li> <li>Table header format problem (internal error).</li> </ul> </li> <li>Verify the following: <ul> <li>The backup/restore device is administered properly (name corresponds with Solaris administered device)</li> <li>The tape compatibility is correct (320 meg tape for 320 meg drive, etc.).</li> <li>The tape drive is clean.</li> </ul> </li> </ul>

Error Code	Message	Reason/Action
2706	MIGRATE DATA Table migration failed. Retry Migrate. Table=	A problem was encountered either reading the indicated table from tape or writing that table into the database. Stop the migration and call Services for help with the table that failed. After the problem is fixed, restart the migration.
2708	MIGRATE DATA Error in process communication. Retry Restore.	A bad message was received either by the <b>R3 Migrate</b> screen or the migration process. If this occurs, some sort of interference occurred in the message queue between the migration process and the <b>R3 Migrate</b> screen. If the problem re-occurs, something is impacting the communication between the processes. Further investigation is necessary to determine the source of the problem. Exit the current instance of the <b>R3</b> <b>Migrate</b> screen and re-initiate the migration. Verify that the problem does not re-occur.
2750	MIGRATE DATA Screen startup failed. Contact Services.	Any number of startup activities could cause this problem. Most can be attributed to accessing screen entries that should never be encountered. If the problem re-occurs, something is in error in the environment of the migrate process and further investigation is necessary to determine the source of the problem. Exit the current instance of the <b>R3</b> <b>Migrate</b> screen and re-initiate the migrate. Verify that the problem does not re-occur.
2751	MIGRATE DATA Screen execution failed. Retry Migrate.	This error can result when an update to the <b>R3 Migrate</b> screen fails. If the problem re-occurs, something is in error in the environment of the migrate process and further investigation is necessary to determine the source of the problem. Exit the current instance of the <b>R3</b> <b>Migrate</b> screen and re-initiate the migration. Verify that the problem does not reoccur.

# **ACD Administration Log**

The ACD Administration Log provides an audit trail for administrative changes made to an ACD by *CMS* users. The ACD Administration Log records real-time administrative changes made by a user through the *CMS* ASCII interface, *Supervisor*, or *Visual Vectors*. The log also records the administrative changes made by a user through a scheduled timetable or *Supervisor* script.

This section contains the following topics:

- Before you begin on page 606
- Permissions on page 606
- Running the ACD Administration Log report on page 607
- ACD Administration Log window field descriptions on page 609

### Before you begin

The following items should be read and understood before working with the ACD Administration Log report:

- The maximum capacity for the log is set at 30,000 records and cannot be changed. When the table size exceeds 30,000 records, the 100 oldest records will be deleted.
- This report can be scheduled through a CMS timetable or a Supervisor script.
- The historical database items of the *CMS* ACD Administration Log is not available for use with the *Avaya CMS Supervisor Report Designer* tool. The *Supervisor* **File** menu option for this report will not display the **Designer** option. It will, however, behave in the same manner as drill-down reports.

### **Permissions**

To view the ACD Administration Log report, the user ID used to log in to this *Supervisor* session requires *read* permission for the **Maintenance** subsystem.



If the ACD Administration Log report is run to display all 30,000 records, your PC should have no less than 200 MB of free disk space to allow for the caching of this data.

### **Running the ACD Administration Log report**

#### Steps

To run the ACD Administration Log report:

1. From the Controller window, select **Tools > Maintenance**.

Supervisor displays the Maintenance window.

🚱 Maintenance			? ×
Operations	Reports	1	
<u>R</u> eports:		, , , , , , , , , , , , , , , , , , ,	
ACD Administration Lo Error Log Report	og Report		
			_
ACD:			
20			
<u>S</u> cript			Help
		ок	Cancel
		OIL	

- 2. Select the Reports tab.
- 3. In the Reports: list, select ACD Administration Log Report.

It is not necessary to select an ACD in the **ACD**: field as this feature allows ACD specification in a subsequent dialog.

#### 4. Select OK.

laintenance ACD A	dministrati	on Log				_	
nputs							
CMS User Ids:					•		f
Dates:				•			
Times:				•	•		
				_	_		
ACD:	(none)		•				
VDNs:					•		
Vectors:					•		
Agents:							
				_			
ACD(2):	(none)		•				
VDNs(2):					•		
Vectors(2):					•		ſ
Agents(2):					- 		l
	, 			_			l
ACD(3):	(none)		•				l
VDNs(3):				-			l
Vectors(3):					•		l
Agents(3):							
estination							
• Vie <u>w</u> Report on Sc							
Print Report on:	Cen						
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		OK		Cancel		<u>H</u> elp	

Supervisor displays the ACD Administration Log window.

The height of this dialog box varies according to the current screen resolution of your PC. A higher screen resolution results in more fields being displayed.

For a description of the **ACD Administration Log** window fields, see <u>ACD</u> <u>Administration Log window field descriptions</u> on page 609 for additional information.

5. In the available fields, enter the data to use in the report. The data can also be selected through the drop-down history lists or through the Browse buttons.

The more fields that you specify, the more restricted the data will be that is used in the report. If all of the input fields are left blank, all records will be displayed.

- 6. In the **Destination** group, select one of the following output options:
  - View Report on Screen The report is displayed on the screen.
  - **Print Report on:** The report is sent to the specified printer. Any printer available to the PC can be used and selected through the button at the right of the field.

#### 7. Select OK.

Supervisor displays the ACD Administration Log Report with the specified data.

CMS Jser ID	ACD	Entity Type	Entity Number	Date Occurred	Time Response Occurred		Command	
nharrell Da	ads1R67vp	VDN	2000	10/25/00	12:22 AM SUCCESS	Multi-agent skill change		
nharrell Da	ids1R67vp	VDN	2002	10/24/00	12:18 AM SUCCESS	Multi-agent skill change		
nharrell Da	ads1R67vp	VDN	2001	10/23/00	12:13 AM SUCCESS	Multi-agent skill change		
nharrell Da	ids1R67vp	Vector	10	10/23/00	12:22 AM SUCCESS	Multi-agent skill change		
nharrell Da	ids1R67vp	Vector	10	10/24/00	12:11 AM SUCCESS	Multi-agent skill change		
nharrell Da	ads1R67vp	Vector	10	10/25/00	12:38 AM SUCCESS	Multi-agent skill change		
nharrell Da	ids1R67vp	Agent	1001	10/23/00	12:23 AM SUCCESS	Multi-agent skill change		
nharrell Da	ids1R67vp	Agent	1002	10/24/00	12:15 AM BUCCESS	Multi-agent skill change		

## ACD Administration Log window field descriptions

The following table provides descriptions for the fields on the **ACD Administration Log** window:

Field	Description
CMS User IDs:	The login(s) of the user(s) to display in the report. If changes were made to the ACD with the specified IDs, those user IDs and the associated changes will be displayed.
Dates:	The date or range of dates to be covered in the report. Only those administrative changes made on or within the date(s) specified will be present in the report.
Times:	A range of time for which log entries are to be displayed. Only those administrative changes made within this time range will be present in the report.
ACDs(n):	The ACD(s) to include in the report.
VDNs(n):	The VDN(s) to include in the report.
Vectors(n):	The Vector(s) to include in the report.
Agents(n):	The login ID(s) to include in the report.

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# **Chapter 12: Using Solaris**

*Avaya CMS* uses the *Solaris* operating system on the Sun computer platform to communicate with terminals and printers, to log errors, and to perform operations. This section addresses how to perform several procedures using Sun Microsystems, Inc. Solaris operating system commands.

This section contains the following topics:

- <u>Before you begin</u> on page 611
- Logging in to CMS on page 612
- Administering passwords on page 614
- Using Solaris printer commands on page 617

# Before you begin

Be cautious when accessing the Solaris system and running Solaris system commands. Damage can result to your *CMS* system if you use the Solaris system commands incorrectly. Before you run any Solaris system command, be sure you know what effect it will have.

# Logging in to CMS

This section contains procedures for logging in to CMS through methods other than using Supervisor. Some administrators will need to do this in order to access capabilities not available through the Supervisor interface.

This section contains the following topics:

- Logging in to CMS from the remote console on page 612
- Logging in to CMS from the server console on page 612

### Logging in to CMS from the remote console

This procedure describes how to log in to CMS from a remote console. Most users log in to CMS remotely.



#### **A** Important:

Do not allow users to share the same login ID as this action will use up Solaris system processes.

#### Steps

1. At the Login: prompt, enter your login ID.

The Password: prompt is displayed.

2. Enter your password.

A prompt for the terminal type is displayed.

3. Enter your terminal type.

If you use a login other than cms, CMS will automatically open to the CMS Main Menu.

If cms is used as the login, you will have to enter cms a second time at the \$ prompt before the Main Menu will be displayed

### Logging in to CMS from the server console

This procedure describes how to log in to CMS from the CMS server console. Logging in to CMS at the server is occasionally necessary in order to perform certain functions, such as a CMSADM backup or other administration functions that require you to switch to single-user mode.



Users who use a /usr/bin/cms shell will not be able to log in to CMS through the Common Desktop Environment (CDE).

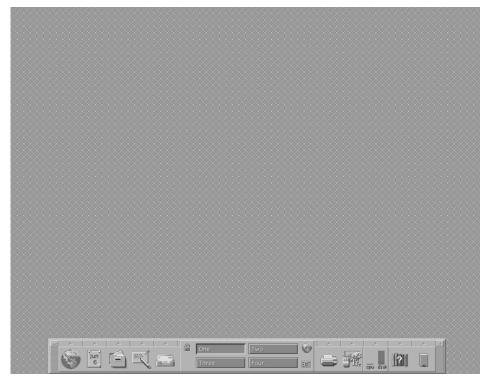
To remedy this problem, you can either use the /usr/bin/ksh shell or use a command line login. The command line login will not use the CDE.

### Steps

To log in to CMS at the server:

1. If the server has just been rebooted or inactive for an extended period of time, the console may be password-protected. If this is the case, unlock the console by entering your authorized username (if necessary) and password in the appropriate login console fields.

Solaris displays the CDE interface.



2. Right-click the cursor in an empty area within the desktop space.

The Workspace Menu is displayed.

- 3. Depending on how CMS was installed, choose one of the following alternatives:
  - If the CMS XTERM option is displayed in the Workspace Menu, you can open an xterm window directly by selecting that option.

• If the CMS XTERM option is not displayed, choose **Tools** > **Terminal** from the **Workspace Menu** to open a terminal window. At the command prompt, enter **xterm** to open an xterm window.

An xterm window is displayed with a # prompt.

# Administering passwords

For system security, passwords are required for all *CMS* user login IDs. If a password is not entered on your first login, the system will prevent you from continuing until one is supplied.

*CMS* users can enter and change their passwords, but only a *CMS* administrator working on the Sun Microsystems, Inc. Solaris system can replace a forgotten password.

This section contains the following topics:

- Before you begin on page 614
- <u>Changing a user's password</u> on page 615
- <u>Administering password aging</u> on page 616

# Before you begin

The following items should be read and understood before attempting to administer passwords:

- Password administration should only be done by an administrator with the password for the *root* user.
- Forcing a password change and administering the Password Aging feature can only be done through the *CMS* ASCII interface. The ASCII interface is available through the following methods:
  - A Terminal Emulator connection to the CMS server
  - A telnet session to the CMS server
  - Direct interaction with the CMS server
- Users should choose a password with no less than six characters. The password must have at least one character as a number or special character and have a minimum of two alphabetic characters.
- When changing a password, the new password must have at least three characters that are different from the previous password.

See <u>Chapter 9: Administering user permissions</u> on page 379 for more information on special characters.

# Changing a user's password

When a user's password expires or it is forcibly made to expire by an administrator, the user is presented with a prompt or window during the *CMS* login process that allows the entry of a new password. The following procedure allows an administrator to cause a user's password to expire so that the user must enter a new password upon their next login attempt.

#### Steps

If a user forgets their password, perform the following procedure:

1. From the CMS Main Menu, highlight the Commands Screen-Labeled Key (SLK).

CMS displays the Commands menu.

2. Select UNIX (r) system.

The screen clears and a \$ prompt is displayed.

3. Enter the following command:

su

4. At the Password: prompt, enter the root password.

The # prompt is displayed.

5. Enter the following command:

#### passwd *<userid>*

Where <userid> is the ID of the user who needs a new password.

Solaris displays a prompt for the new password.

6. Enter a new password for the user.

Solaris displays the # prompt.

7. Enter the following command:

#### passwd -f *<userid>*

Where *<userid>* is the ID of the user with a new password.

Solaris displays the # prompt.

The <code>passwd -f</code> command will force the user to change their password the next time they log in to CMS.

8. Enter the following command:

exit

*Solaris* displays the \$ prompt.

9. Enter the following command and press the Enter key:

exit

CMS displays the Main Menu.

# Administering password aging

This section provides introductory and prerequisite information regarding the password aging feature of *CMS*.

Password aging is a feature that forces *CMS* users to change their password after a specified number of weeks have passed. Once this feature is activated, all users are required to change their passwords when the expiration period is reached.

### Before you begin

### Important:

If you have a custom configuration from the Avaya Professional Services Organization (PSO) or use third-party applications on your *CMS* server, you must contact the PSO before enabling the password aging feature so that customizations are not affected. The PSO can be contacted through the technical support telephone number given in <u>Support</u> on page 26.

The following items should be read and understood before attempting to change the password aging feature:

- The number of weeks that pass before a password change is required can range from 1 to 52 weeks. The default value for this feature is 9 weeks.
- The password aging feature is only available through the **cmsadm** menu in the ASCII interface of *CMS*. This feature is not accessible through *Avaya CMS Supervisor*.

#### Steps

For more information and procedures for administering the password aging feature, see *Avaya Call Management System Release 12 Software Installation, Maintenance, and Troubleshooting Guide,* 585-215-117.

# **Using Solaris printer commands**

The *Solaris* commands for performing printer administration can be found in the Avaya CMS Terminals, Printers, and Modems document.

#### Note:

It is recommended that you use the port administration tool instead of the Solaris tools to administer terminals, printers, and modems. The port administration tool keeps a record of all administrative activity in a format that is more structured than the Solaris tools. Once you start using the port administration tool, you should consistently use it for all port administration.

**Using Solaris** 

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# Chapter 13: Using timetables and shortcuts

This section provides information on timetables and shortcuts and how to create and administer them. Timetables and shortcuts are used to run multiple administrative tasks and are only available through the *CMS* ASCII interface.

Access to the CMS ASCII interface can be done through the following methods:

- Terminal Emulator
- Telnet session to the CMS
- Direct interaction with the CMS server console

This section contains the following topics:

- Timetables on page 619
- <u>Shortcuts</u> on page 642

# Timetables

A timetable is a *CMS* feature that enables the scheduling of one or more administrative tasks. Each timetable can consist of up to 100 tasks and can be scheduled to run at any specific time. When you are creating a timetable, *CMS* records the tasks you perform and includes them in the timetable. This feature is similar to macros in many PC applications that perform multiple tasks or actions when the single macro is run.

Timetables are better suited for mission-critical tasks than *Supervisor* scripts. This is due to the fact that scripts reside on the PC where they were created. If network difficulties occur or if the PC where the script resides is powered down, the script cannot run. Timetables run directly on the *CMS* server and do not suffer from such problems.

This section contains the following topics:

- Before you begin on page 620
- Permissions on page 621
- Creating and scheduling a timetable on page 621
- Adding tasks to a timetable on page 625
- Listing all timetables on page 627

- <u>Copying a timetable</u> on page 628
- Copying timetable tasks on page 629
- Modifying timetable tasks on page 631
- Editing timetables globally on page 633
- Globally editing tasks in a timetable on page 635
- Deleting tasks from a timetable on page 638
- Deleting a timetable on page 640

# Before you begin

The following items should be read and understood before working with timetables:

### General

- You cannot schedule real-time reports, Vector Contents, or custom report creation through a timetable.
- Timetables run in the background, not in the terminal session.
- Timetables that fail at some point during execution are logged in the Maintenance Error Log Report.
- Up to five timetables can be scheduled to run at the same time.
- You can have tasks associated with different ACDs in the same timetable.
- Do not create a timetable that attempts to write a file in the home directory of different user.
- The ACD that is currently selected when a timetable task is created will be the ACD on which the task runs. To change the ACD, you must delete the task and reset the current ACD before adding the correct task.
- When a *CMS* user is deleted, any timetables associated with that user ID are also deleted. For this reason, it is recommended that mission-critical timetables be created under the cms user ID.
- If the System Administration Terminal (SAT) terminal is still logged in to the Communication Manager system and is displaying a screen used in timetables, those timetables will not run.
- Timetables cannot run if CMS is in single-user mode.

### Printing

• You cannot select the terminal as the destination for report output through a timetable.

- To print a report more than once from a timetable, you must enter a task for each copy of the report.
- Print jobs from timetables go to the default printer for the user who owns the timetable unless otherwise specified when the timetable is created. If the default printer for a user is changed, there is no need to edit the timetable as *CMS* automatically sends the print jobs from the timetable to the new default printer.
- If a user specifies a printer other than their default printer for a timetable task and that printer is out of service, the timetable will not execute.
- If the printer jams while attempting to print timetable tasks, you must resubmit the request that did not print.

#### Backups

- Timetables for incremental and full backups are created when the system is installed, but are not scheduled.
- Be sure to schedule backups to run either before archiving begins or after archiving has been completed.

## **Permissions**

Depending on the procedure that you want to perform, you need the following permissions:

- To view timetables, the user ID used to log in to this *CMS* session requires *read* permission for the **Timetables** feature, the requested *CMS* actions, and any ACD entities accessed by the timetable.
- To add, delete, or modify timetables, the user ID used to log in to this CMS session requires *write* permission for the **Timetables** feature.
- Users who are not Administrators can view and copy timetables from other users, but they cannot add, delete, or modify the timetables or the task entries.
- Users with Administrator permissions can add, delete, and modify timetables created by other users.
- If a timetable contains tasks for which the user does not have adequate permissions, the timetable will fail.

## Creating and scheduling a timetable

This topic provides the procedure for creating and scheduling a timetable through the CMS ASCII interface.

### Steps

To create a timetable:

1. From the CMS Main Menu, select the Keep Screen-Labeled Key (SLK).

Depending on the connection method to the *CMS* interface, this action can be accomplished through the following methods:

- For Terminal Emulator, select the F4 key.
- From the CMS console, press the F4 key.
- For a telnet session from a PC, press Ctrl+P, 4.
- 2. Select Timetable and press the Enter key.

CMS displays the Timetable window.

Timetable	test
	Add
Timetable name:	Copy
Description:	Delete
	Find one
User ID: cms	Get contents
Start time:	Global edit
Start date:	List all
Frequency and attributes (Select only one):	Modify
<x> Once</x>	Next
<pre></pre>	Previous
< > Hourly, Stop time: 11:59 PM	
< > Daily,	
Hourly/Daily Days (Select any you wish):	
[ <u>x</u> ] Sunday [ <u>x</u> ] Tuesday [ <u>x</u> ] Thursday	[x] Saturday
[x] Monday [x] Wednesday [x] Friday	
This timetable will run on this or another CMS serv	er
< > Run only on this CMS server*	
<x> Run on this or another CMS server*</x>	
*These fields not used for Find one or List all	
	21x68

3. In the **Timetable name:** field, enter a unique name for this timetable. The name of the timetable cannot be changed after it has been created. Every timetable must have a unique name.

The following list provides the types of characters that can be entered in this field:

- Alphanumeric (A-z, 0-9)
- Underscore (\_)
- Blank ()
- Comma (,)
- Period (.)
- Single Quotation Marks (')
- Plus sign (+)

4. In the **Description:** field, enter a description for the timetable.

This field is optional.

- 5. In the **User ID:** field, the user ID currently logged in is displayed. If you are an administrator and want to create this timetable for another user ID, enter that user ID in this field.
- 6. In the **Start time:** field, enter the time when the timetable will be executed. If you do not wish to schedule the timetable at this time, leave this field blank.

This field can accept time in the following formats:

- HH AM/PM
- HH:MM AM/PM
- 24-hour (00:00 23:59)

If AM/PM is not specified, CMS assumes that the time entered is in the 24-hour format.

7. In the Start date: field, enter the date on which the timetable will begin running.

Use one of the following formats for entering the date in this field:

- MM/DD/YY For example, 12/12/01. Do not enter four-digits years in this field.
- Relative format For example, entering a 1 specifies the timetable will begin one day from today (tomorrow).

### **A** Important:

If you do not wish to schedule the time table at this point, leave the **Start time:** and **Start date:** fields blank, ensure an x is in the **Once** field, and skip ahead to Step 11.

- 8. In the Frequency and attributes: group, choose from the following options:
  - Once This option runs the timetable one time for the date and time specified in the Start time: and Start date: fields. This is the default value for this field group.
  - **Dates:** This option runs the timetable on specific dates. Enter the dates in the fields provided for this option.
  - Hourly This option runs the timetable each hour. In the Stop time: field, enter the time when the timetable should stop running.
  - **Daily** This option runs the timetable on the selected days in the **Hourly/Daily Days** group.
- 9. If the **Hourly** or **Daily** option was selected in the previous step, place an x next to the days in the **Hourly/Daily Days** group for which the timetable should run.
- 10. Place an  $\times$  in one of the following options:
  - Run only on this CMS server The timetable will run only on this CMS server. If this timetable is backed up and migrated to another CMS server, it will not run.

- Run on this or another CMS server The timetable is capable of running on this or any other CMS server. If this timetable is backed up and migrated to another CMS server, it will function normally.
- 11. Press the **Enter** key, highlight the **Add** item on the action list by using the arrow keys on the keyboard, and press **Enter** again.

The window displays a **Working** message. If the timetable name is currently present, **already exists** displays on the status line and you must enter a different timetable name in the **Timetable name:** field. If all entries are valid, the **Main Menu** displays with **Keeping Entries** displayed in the border.

12. Select a task from the CMS Main Menu that will be recorded to this new timetable.

*CMS* displays an **Entries Stored** in the status line of the current window when the task is run.

To run an historical report for the system:

- a. Select **Reports** from the **Main Menu**.
- b. Select Historical.
- c. Select System.
- d. Select System.
- e. Select Daily.

CMS displays the report window.

13. Enter the required information in the Split(s)/Skill(s) and Date fields.

The **Date** field can accept relative dates; for example, 0 represents today and -1 represents yesterday.

14. Press the **Enter** key to access the action list, select the menu item that performs the necessary action, and then press the **Enter** key again.

CMS displays a confirmation window.

It is possible to create more than one timetable task from a window. For example, suppose you want historical split/skill summary interval reports for skills 1 through 9, and you also want the same date and times for each report. To create this report, perform the following steps:

- a. Go to the report window and enter the following data:
  - Enter 1 for the skill number.
  - Enter **0** for the date.
  - Enter 8:00-16:00 for the times.
- b. Select Run on the action list. This creates a timetable task for skill 1.
- c. Returning to the report input window, enter 2 for the skill number and select Run on the action list. This creates a timetable task for skill 2. Repeat the same process for skills 3 through 9.

- 15. Exit the window for the task and return to the Main Menu.
- 16. To add more tasks to the timetable, return to Step 12. Otherwise, open the **Keep** SLK menu and then select the **Stop** option.

CMS displays a confirmation window asking if the timetable should be saved.

17. When *CMS* displays the confirmation window, press the **Y** key for **Yes** and then the **Enter** key to save the task.

#### Note:

To exit the timetable at any time without saving your changes, select **Stop** from the **Keep** SLK menu and then enter  $\mathbf{n}$  in the confirmation window.

18. Select the Exit SLK to close the Timetable window.

## Adding tasks to a timetable

This topic provides the procedure for adding tasks to an existing timetable. This feature enables you to add tasks to a timetable in the same way you added tasks when you first created the timetable.

#### Steps

To add tasks to a timetable:

- 1. From the CMS Main Menu, select the Keep Screen-Labeled Key (SLK).
- 2. Select **Timetable** and press the **Enter** key.

CMS displays the Timetable window.

Timetable	test1
	Add
Timetable name:	Copy
Description:	Delete
	Find one
User ID: cms	Get contents
Start time:	Global edit
Start date:	List all
Frequency and attributes (Select only one):	Modify
<x> Once</x>	Next
<pre></pre>	Previous
	L
<_> Hourly, Stop time: <u>11:59 PM</u>	
<_> Daily,	
Hourly/Daily Days (Select any you wish):	
[ <u>x]</u> Sunday [ <u>x]</u> Tuesday [ <u>x]</u> Thursday	[ <u>x</u> ] Saturday
[ <u>x</u> ] Monday [ <u>x</u> ] Wednesday [ <u>x</u> ] Friday	
This timetable will run on this or another CMS serve	er
<_> Run only on this CMS server*	
$\langle \underline{\mathbf{x}} \rangle$ Run on this or another CMS server*	
*These fields not used for Find one or List all	
	21x68

3. Press **Ctrl + Z**.

The fields in the window are cleared of all default information.

- 4. In the **Timetable name** field, enter the name of the timetable to which you want to add a task.
- 5. Press the Enter key.

CMS shifts focus to the action list.

6. In the action list, use the arrow keys to select **Get contents** and press the **Enter** key. *CMS* displays the **Timetable: Get Contents** window.

Timetable: Get Contents			test1
Task(s):		Add tas	sks
Timetable: Sample timetable	Number of tasks: 10	Copy	
Task Action Window Title		Delete	
	it: Summary: Interval Input	Global	edit
	it: Summary: Daily Input	Modify	
	it: Summary: Weekly Input		
4 Run Rpts: Hist: Age	it: Summary: Monthly Input	test1	a510
5 Run Rpts: Hist: Age	it: Split/Skill: Interval Input	test1	a510
6 Run Rpts: Hist: Age	it: Split/Skill: Daily Input	test1	a510
7 Run Rpts: Hist: Age	<pre>it: Split/Skill: Weekly Input</pre>	test1	a510 V
		103×1	132 >

7. In the **Task(s):** field, enter the number of the task that you want to precede the task being added.

If the task being added should appear as the fifth task, enter 4 in the Task(s): field.

To add a task to the beginning of the timetable, leave the **Task(s):** field blank. The new task is added before the first task.

To add tasks to a timetable with no tasks, leave the **Task(s):** field blank.

8. Press the Enter key.

CMS shifts focus to the action list.

9. Use the arrow keys to highlight the **Add tasks** item and press the **Enter** key.

*CMS* displays the **Main Menu** and is waiting for you to perform an action that it can add as a task. The status line of the **Main Menu** displays **Keeping Entries**.

10. Perform the task that you wish to have added to timetable. For more information on the steps necessary in adding a task to a timetable, see Step 12 in <u>Creating and</u> <u>scheduling a timetable</u> on page 621.

When the task is performed, CMS displays Entries Stored in the status line.

11. Exit the task window.

CMS displays the Main Menu.

At this point, more tasks can be added simply by performing them. These tasks will be added to the timetable in order following the previous task.

12. If you finished adding tasks to the timetable, open the **Keep** SLK menu and then select the **Stop** option.

CMS displays a confirmation window asking if the timetable should be saved.

13. Press the Y key for Yes and then the Enter key.

*CMS* saves the timetable with the newly added tasks and displays the **Timetable: Get Contents** window.

## Listing all timetables

This topic provides the procedure for listing all timetables that currently exist in the *CMS* database. Listing all timetables can assist in finding specific timetables when you cannot remember the entire name of a timetable. It is also useful in helping to determine if too many timetables are scheduled to run at the same time.

#### Steps

To list all timetables:

- 1. From the CMS Main Menu, select the Keep Screen-Labeled Key (SLK).
- 2. On the Keep SLK menu, select Timetable.

CMS displays the Timetable window.

3. Press Ctrl + Z.

CMS clears the default information from all fields in the Timetable window.

4. Press the Enter key.

CMS shifts focus to the action list.

5. Using the arrow keys, move the cursor to the **List all** menu item and press the **Enter** key.

CMS displays the **Timetable: List All** window listing all timetables.

				Start
Timetable Name	User ID	Status	Next Run	Time
skh11.20.2	cms	finished		1:30 PI
temp7	cms			
temp9	cms	finished		1:30 PI
tst	cms			

Use the right- and left-arrow keys to scroll to the other fields in this window.

The following list describes the entries that can appear in the **Status** field.

- Finished This message indicates that the timetable was scheduled to run once and it completed successfully.
- Failed This message indicates that the timetable failed to run successfully for the last scheduled run time.

- Successful This message indicates that the timetable completed successfully.
- **Unscheduled** This message indicates that the timetable does not have a start time or start date.
- Running This message indicates that the timetable is currently running.

## Copying a timetable

This topic provides the procedure for copying an existing timetable to a new timetable. Although you can copy timetables from other users, you cannot copy over an existing timetable. When you copy a timetable, the scheduling information and tasks in the timetable are copied. The name of the timetable that will be copied should be known before starting this procedure.

#### Steps

To copy a timetable:

1. Select Timetable on the Keep Screen-Labeled Key (SLK) menu.

CMS displays the **Timetable** window.

Timetable name: Description: User ID: <u>oms</u> Start time: Start date: Frequency and attributes (Select only one): < <u>x</u> > Once <_> Dates: E	Add Copy Delete Find one Get contents Global edit List all Modify Next
Description:	Delete Find one Get contents Global edit List all Modify
User ID: <u>cms</u> G         Start time:       G         Start date:       I         Frequency and attributes (Select only one):       M         < <u>x</u> > Once       M         <> Dates:	Find one Get contents Global edit List all Modify
User ID: <u>cms</u> Start time: Start date: Frequency and attributes (Select only one): M < <u>x</u> > Once M <_> Dates:	Get contents Global edit List all Modify
Start time:	Global edit List all Modify
Start date:       I         Frequency and attributes (Select only one):       M         < <u>x</u> > Once       M         <_> Dates:	List all Modify
Frequency and attributes (Select only one):         M <x> Once         M           &lt;_&gt; Dates:        </x>	Modify
< <u>x&gt;</u> Once <_> Dates:	-
<pre>     Dates: [     E</pre>	Next
	Previous
<_> Hourly, Stop time: <u>11:59 PM</u> <_> Daily, Hourly/Daily Days (Select any you wish): [x] Sunday [x] Tuesday [x] Thursday [x] [x] Monday [x] Wednesday [x] Friday This timetable will run on this or another CMS server <_> Run only on this CMS server* <x> Run on this or another CMS server* *These fields not used for Find one or List all</x>	[ <u>x</u> ] Saturday

2. In the **Timetable name:** field, enter the name that will be used for the new timetable.

The following list provides the types of characters that can be entered in this field:

- Alphanumeric (A-z, 0-9)
- Underscore (\_)
- Blank ()
- Comma (,)

- Period (.)
- Single Quotation Marks (')
- Plus sign (+)
- 3. In the **User ID:** field, confirm that your user ID is present.
- 4. Press the Enter key.

CMS shifts focus to the action list.

5. Use the arrow keys to highlight the **Copy** item in the action list and press the **Enter** key.

CMS displays the Timetable: Copy window.



- 6. In the Copy from: field, enter the name of the timetable to copy.
- 7. In the **User ID** field, enter the user ID that is currently associated with the existing timetable.
- 8. Press the Enter key.

CMS shifts focus to the action list of the Timetable: Copy window.

9. Press the Enter key again.

CMS displays Successful in the status bar.

If this new timetable is not scheduled to run, *CMS* displays a message notifying you that this copy needs to be rescheduled.

10. Select the Exit SLK to close the Timetable window.

# Copying timetable tasks

This topic provides the procedure for duplicating tasks within a timetable.

### Before you begin

The following items should be read and understood before copying timetable tasks:

- Only the owner of the timetable or an administrator can copy timetable tasks.
- You cannot copy a task more than once using the **Copy** command in the **Get Contents** window. You must reuse the **Copy** command to make additional copies of a task.
- You cannot copy more than 100 tasks into a timetable. If you exceed the limit, none of the tasks are copied. The status line will display a **Failed** message when this occurs.

• Copies of tasks can be placed after a specified task in the timetable, or each copy can be placed directly after the task from which it was copied. The default is to place the copies after the last task in the timetable.

#### Steps

To copy a timetable task:

- 1. From the CMS Main Menu, select the Keep Screen-Labeled Key (SLK).
- 2. Select Timetable and press the Enter key.

CMS displays the Timetable window.

imetable	_ test
	Add
Timetable name:	Copy
Description:	Delete
	Find one
User ID: cms	Get contents
Start time:	Global edit
Start date:	List all
Frequency and attributes (Select only one):	Modify
<x> Once</x>	Next
<pre></pre>	Previous
	L
<_> Hourly, Stop time: <u>11:59 PM</u>	
Hourly/Daily Days (Select any you wish):	
[ <u>x]</u> Sunday [ <u>x]</u> Tuesday [ <u>x</u> ] Thursday	[ <u>x</u> ] Saturday
[ <u>x]</u> Monday [ <u>x]</u> Wednesday [ <u>x</u> ] Friday	
This timetable will run on this or another CMS serv	er
<_> Run only on this CMS server*	
$< \underline{\mathbf{x}} >$ Run on this or another CMS server*	
*These fields not used for Find one or List all	
	21x68

3. Press Ctrl + Z.

The fields in the window are cleared of all default information.

- 4. In the **Timetable name:** field, enter the name of the timetable containing the task to copy.
- 5. In the **User ID:** field, enter the user ID that created the timetable.

If you are not the owner or an administrator, you will not be able to copy tasks in the timetable.

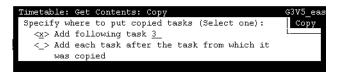
6. Press the Enter key.

CMS shifts focus to the action list.

7. Use the arrow keys to highlight the **Get contents** menu item and press the **Enter** key. *CMS* displays the **Timetable: Get Contents** window.

		Get Con	tents						test1
Task	(5):							Add ta	sks –
Time	table:	Sample	timetal	ble	Number	of	tasks: 10	Copy	
Task	Actio	n Windo	√ Titl	e				Delete	
1	Run	Rpts:	Hist:	Agent:	Summary:	Int	erval Input	Global	edit
2	Run	Rpts:	Hist:	Agent:	Summary:	Dai	ly Input	Modify	
3	Run	Rpts:	Hist:	Agent:	Summary:	Weel	kĺ∨ Input		
4	Run	Rpts:	Hist:	Agent:	Summary:	Mon	thÌ∨ Input	test1	a510
5	Run	Rbts:	Hist:	Agent:	split/sk	ill:	Interval Input	test1	a510
6	Run						Daily Input	test1	a510
7	Run						Weekly Input	test1	a510 🕷
				-				1074	122 5

- 8. In the **Task(s):** field, enter the task number to copy and press the **Enter** key. *CMS* shifts focus to the action list of the **Timetable: Get Contents** window.
- 9. Using the arrow keys, highlight the **Copy** menu item, and press the **Enter** key. *CMS* displays the **Timetable: Get Contents: Copy** window.



- 10. Choose one of the following options by placing an **x** next to it:
  - Add following task The copied task will be placed immediately after the task specified in this field.
  - Add each task after the task from which it was copied The copied task is placed immediately after itself.

The default action is to place the copied task at the end of the list.

11. Press the Enter key.

CMS shifts focus to the action list.

12. Press the Enter key again.

*CMS* displays **Working** in the status line. When the operation completes, the status line displays **Successful**. *CMS* closes the **Copy** window and displays the **Get Contents** window.

If the operation fails, a message window appears stating the reason for the failure.

13. To close the Get Contents window, select the Exit SLK.

# Modifying timetable tasks

This topic provides the procedure for modifying tasks within a timetable. The **Modify** feature allows you to modify the action or data associated with any task within the selected timetable.

### Before you begin

The following items should be read and understood before modifying timetable tasks:

- Only the owner or an administrator can modify timetable tasks.
- The **Current** and **Main Menu** Screen-Labeled Keys (SLKs) are blocked while modifying tasks.
- If you press the **Exit** SLK without selecting a task action, a popup window is displayed stating that the task modification has been cancelled.
- To exit the timetable without saving any changes, select the **Stop** item from the **Keep** SLK menu.

#### Steps

To change a timetable task:

- 1. From the CMS Main Menu, select the Keep Screen-Labeled Key (SLK).
- 2. Select Timetable and press the Enter key.

CMS displays the Timetable window.

Timetable	test1
	Add
Timetable name:	Copy
Description:	Delete
	Find one
User ID: <u>cms</u>	Get contents
Start time:	Global edit
Start date:	List all
Frequency and attributes (Select only one):	Modify
< <u>x</u> > Once	Next
<_> Dates:	Previous
<_> Hourly, Stop time: <u>11:59 PM</u>	
<_> Daily,	
Hourly/Daily Days (Select any you wish):	
$[\underline{x}]$ Sunday $[\underline{x}]$ Tuesday $[\underline{x}]$ Thursday	[ <u>x</u> ] Saturday
[ <u>x</u> ] Monday [ <u>x</u> ] Wednesday [ <u>x</u> ] Friday	
This timetable will run on this or another CMS serv	er
<_> Run only on this CMS server*	
$\langle \underline{\mathbf{x}} \rangle$ Run on this or another CMS server*	
*These fields not used for Find one or List all	
	21x68

3. Press Ctrl + Z.

The fields in the window are cleared of all default information.

- 4. In the **Timetable name:** field, enter the name of the timetable containing the task to modify.
- 5. In the **User ID:** field, enter the user ID that created the timetable.

If you are not the owner or an administrator, you will not be able to modify tasks in the timetable.

6. Press the Enter key.

CMS shifts focus to the action list.

Use the arrow keys to highlight the Get contents menu item and press the Enter key.
 CMS displays the Timetable: Get Contents window.

Timetable: Get	: Contents			test1
Task(s):			Add tas	ks
	mple timetable	Number of tasks: 10	Copy	
Task Action W		_	Delete	
		it: Summary: Interval Input	Global	edit
		it: Summary: Daily Input	Modify	
		it: Summary: Weekly Input		
4 Run R	lpts: Hist: Age	it: Summary: Monthly Input		a510
		it: Split/Skill: Interval Input		a510
		it: Split/Skill: Daily Input		a510
7 Run R	kpts: Hist: Age	<pre>it: Split/Skill: Weekly Input</pre>	test1	a510 V
			103×1	32 >

- 8. In the **Task(s):** field, enter the number of the task to modify and press the **Enter** key. *CMS* shifts focus to the action list of the **Get Contents** window.
- Using the arrow keys, highlight the **Modify** menu item and press the **Enter** key.
   *CMS* displays a window for the specified task.
   Example:

Rpts: Hist: Agent: Summary: Interval Inp Agent: 0001 Date: 0 Times: 10:00	test1 Run
Report destination (Select one):	
<pre>&lt;&gt;&gt; Printer, Printer name: &lt; &gt; File, File name:</pre>	

- 10. Make any necessary changes to the task.
- 11. When the changes have been made, press the Enter key.

CMS shifts focus to the action list.

12. Using the arrow keys, highlight the appropriate action to perform in the action list and press the **Enter** key.

CMS displays a confirmation window asking if changes should be saved.

13. To save the changes made to the task, press the **Y** key for 'Yes' and then press the **Enter** key.

CMS saves the task changes to the timetable and displays the Get Contents window.

14. To exit the Get Contents window, select the Exit SLK.

# Editing timetables globally

Globally editing timetables changes the server compatibility for all timetables associated with a user ID.

Server compatibility of timetables can be one of the two following states:

- Run only on this CMS server The timetable will run only on this CMS server. If this timetable is backed up and migrated to another CMS server, it will not run.
- Run on this or another CMS server The timetable is capable of running on this or any other CMS server. If this timetable is backed up and migrated to another CMS server, it will function normally.

#### Before you begin

The following items should be read and understood before making global edits to timetable tasks:

- Only the owner of the timetable or an administrator can globally edit a timetable.
- If an error is made during a global edit, *CMS* displays an error message describing the nature of the problem. All errors must be corrected before *CMS* allows you to complete the modifications.

#### Steps

To edit a timetable globally:

- 1. From the CMS Main Menu, select the Keep Screen-Labeled Key (SLK).
- 2. Select Timetable and press the Enter key.

CMS displays the **Timetable** window.

Timetable	testi
	Add
Timetable name:	Copy
Description:	Delete
	Find one
User ID: cms	Get contents
Start time:	Global edit
Start date:	List all
Frequency and attributes (Select only one):	Modify
< <u>x</u> > Once	Next
<_> Dates:	Previous
<pre>&lt;_&gt; Hourly, Stop time: <u>11:59 PM</u> &lt;_&gt; Daily, Hourly/Daily Days (Select any you wish):     [x] Sunday [x] Tuesday [x] Thursday     [x] Monday [x] Wednesday [x] Friday This timetable will run on this or another CMS server*   &lt;_&gt; Run on this or another CMS server*   *These fields not used for Find one or List all</pre>	
	21x68

3. Press Ctrl + Z.

The fields in the window are cleared of all default information.

 In the Timetable name: field, enter the name of the timetable containing the tasks to modify globally. 5. Press the **Enter** key.

CMS shifts focus to the action list.

6. Using the arrow keys, highlight Find one and press the Enter key.

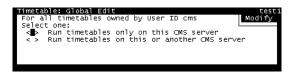
*CMS* locates the timetable and populates the remaining fields with the information from the timetable.

7. Press the Enter key.

CMS shifts focus to the action list.

8. Using the arrow keys, highlight Global edit and press the Enter key.

CMS displays the Timetable: Global Edit window.



- 9. Select one of the following options by placing an x in the associated field:
  - Run timetables only on this CMS server All timetables owned by the specified user ID will be modified so that they can only run on this CMS server. Timetables migrated to another server will not function.
  - Run timetables on this or another CMS server All timetables owned by the specified user ID will be modified so that they can run on the current CMS server or, if migrated, a different CMS server.
- 10. Press the Enter key.

CMS shifts focus to the action list and highlights the **Modify** action.

11. Press the Enter key again.

*CMS* will display a message in the status line of this window indicating how many timetables were updated.

12. Use the Exit SLK to close this window and return to the Timetable window.

The timetable displayed in the **Timetable** window does not update automatically. Use the **Find one** action to re-query for this table in order to show the current configuration.

## Globally editing tasks in a timetable

This topic provides the procedure for changing multiple tasks in a timetable to use a common date, time, or printer destination. For example, you may want to run all reports within a timetable so that instead of reporting on data for today (relative date: 0), the reports will use data from yesterday (relative date: -1). Using the global edit feature can change the dates used for these reports in a simple series of steps instead of modifying

each task separately. This feature can also be used to modify tasks that have different values for times, dates, or printer destinations so that all specified tasks use consistent values.

#### Before you begin

The following items should be read and understood before making global edits to timetable tasks:

- Only the owner of the timetable or an administrator can globally edit a timetable.
- If an error is made during a global edit, *CMS* displays an error message describing the nature of the problem. All errors must be corrected before *CMS* allows you to complete the modifications.

#### Steps

To edit multiple tasks within a timetable:

- 1. From the CMS Main Menu, select the Keep Screen-Labeled Key (SLK).
- 2. Select Timetable and press the Enter key.

CMS displays the Timetable window.

Timetable	test1
	Add
Timetable name:	Сору
Description:	Delete
	Find one
User ID: <u>cms</u>	Get contents
Start time:	Global edit
Start date:	List all
Frequency and attributes (Select only one):	Modify
< <u>x</u> > Once	Next
<_> Dates:	Previous
<pre>&lt;_&gt; Hourly, Stop time: <u>11:59 FM</u> &lt;_&gt; Daily, Hourly/Daily Days (Select any you wish):     [½] Sunday [½] Tuesday [½] Thursday     [½] Monday [½] Wednesday [½] Friday This timetable will run on this or another CMS server*   &lt;_&gt; Run only on this CMS server*   &lt;<u>x</u>&gt; Run on this or another CMS server*   &lt;<u>x</u>&gt; Run on this or another CMS server*</pre>	
	21x68

3. Press Ctrl + Z.

The fields in the window are cleared of all default information.

- 4. In the **Timetable name:** field, enter the name of the timetable containing the tasks to modify globally.
- 5. Press the Enter key.

CMS shifts focus to the action list.

6. Using the arrow keys, highlight Find one and press the Enter key.

*CMS* locates the timetable and populates the remaining fields with the information from the timetable.

7. Press the Enter key.

CMS shifts focus to the action list.

8. Using the arrow keys, highlight Get contents and press the Enter key.

CMS displays the **Timetable: Get Contents** window.

		Get Con	tents				test
	<(s):					Add ta	ısks
		Sample			Number of tasks: 10	Copy	
Task	< Actio	n Windo	w Titl	e		Delete	
1	Run				Summary: Interval Input	Global	
2	Run	Rpts:	Hist:	Agent:	Summary: Daily Input	Modify	·
3	Run				Summary: Weekly Input		
4	Run	Rpts:	Hist:	Agent:	Summary: Monthly Input	test1	a510
5	Run	Rpts:	Hist:	Agent:	Split/Skill: Interval Input	test1	a510
6	Run	Rpts:	Hist:	Agent:	Split/Skill: Daily Input	test1	a510
7	Run	Rpts:	Hist:	Agent:	Split/Skill: Weekly Input	test1	a510
				Ē		103×	132 >

- 9. In the Task(s): field, enter the tasks to modify using the following methods:
  - Range For example, 1–50.
  - Separate values For example, 1; 3; 6; 7.
  - Combination For example, 1; 3-7; 10.
- 10. After the tasks to globally edit have been specified, press the **Enter** key. *CMS* shifts focus to the action list.
- 11. Using the arrow keys, highlight Global edit and press the Enter key.

CMS displays the Timetable: Get contents: Global edit window.

	firm
	lify
< > Times	
< > Printer	

- 12. Place an  $\mathbf{x}$  in the field that will be changed for all specified tasks.
- 13. In the field to the right of the selected option, enter one or more values as necessary.

To have multiple reports retrieve contact center data that occurred at 2:00 PM, place an x in the **Times** option and enter 2:00 PM or 14:00 in the associated field to the right.

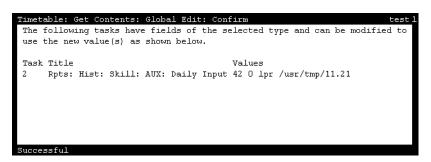
For the **Date/Dates** option, enter dates in either MM/DD/YY format or the relative format based on today (**0** for today, **-1** for yesterday). You can separate individual data entry items with semicolons (;) and value ranges with hyphens (-) between entries.

14. Press the Enter key.

CMS shifts focus to the action list.

15. Using the arrow keys, highlight Confirm and press the Enter key.

CMS displays the Timetable: Get Contents: Global Edit: Confirm window.



This window is used to confirm the tasks that will be modified. No changes have been made at this point. If some specified tasks do not appear in the confirmation window, it is because those tasks do not use the data specified when they are run. For example, some reports only use a date value to retrieve information; therefore, changing the time value will not modify this task. If the tasks listed in this window are not correct, you can go back to the previous windows and make adjustments as necessary.

16. Select the Exit SLK.

CMS closes the Timetable: Get Contents: Global Edit: Confirm window.

17. If you are satisfied with the changes, press the Enter key.

CMS shifts focus to the action list.

18. Using the arrow keys, highlight **Modify** and press the **Enter** key.

*CMS* modifies the tasks in this timetable with the data values specified, closes the **Timetable: Get Contents: Global Edit** window, and displays **Successful** in the status line when the operation is complete.

19. Close the Timetable: Get Contents by selecting the Exit SLK.

## **Deleting tasks from a timetable**

This topic provides the procedure for deleting individual tasks from a timetable.

#### Before you begin

The following items should be read and understood before deleting tasks from a timetable:

- Only the owner of the timetable or an administrator can delete tasks from a timetable.
- To exit the timetable without saving any changes, select the **Stop** item from the **Keep** SLK menu.

### Steps

To delete a task from a timetable:

- 1. From the CMS Main Menu, select the Keep Screen-Labeled Key (SLK).
- 2. Select Timetable and press the Enter key.

CMS displays the **Timetable** window.

Timetable	test1
	Add
Timetable name:	Сору
Description:	Delete
	Find one
User ID: cms	Get contents
Start time:	Global edit
Start date:	List all
Frequency and attributes (Select only one):	Modify
<x> Once</x>	Next
<_> Dates:	Previous
<pre>A set of the s</pre>	
	21x68

3. Press Ctrl + Z.

The fields in the window are cleared of all default information.

- 4. In the **Timetable name:** field, enter the name of the timetable containing the tasks to modify globally.
- 5. Press the Enter key.

CMS shifts focus to the action list.

6. Using the arrow keys, highlight Find one and press the Enter key.

*CMS* locates the timetable and populates the remaining fields with the information from the timetable.

7. Press the **Enter** key.

CMS shifts focus to the action list.

8. Using the arrow keys, highlight **Get contents** and press the **Enter** key.

CMS displays the Timetable: Get Contents window.

Task(s): Timetable: Sampletimetable Number of tasks: 10 Copy Task Action Window Title Global 1 Run Rpts: Hist: Agent: Summary: Interval Input Global	
Task Action Window Title Delete	edit
	edit
1 Run Rpts: Hist: Agent: Summary: Interval Input Global	odit
2 Run Rpts: Hist: Agent: Summary: Daily Input Modify	
3 Run Ripts: Hist: Agent: Summary: Weekly Input	
4 Run Rpts: Hist: Agent: Summary: Monthly Input test1	a510
5 Run Rpts: Hist: Agent: Split/Skill: Interval Input test1	a510
6 Run Rpts: Hist: Agent: Split/Skill: Daily Input test1	a510
7 Run Rpts: Hist: Agent: split/Skill: Weekly Input test1	a510 V

- 9. In the **Task(s):** field, enter the number of the task to delete.
- 10. Press the Enter key.

CMS shifts focus to the action list.

11. Using the arrow keys, highlight **Delete** and press the **Enter** key.

CMS displays a confirmation window.

12. Press the **Y** key for 'Yes' and then the **Enter** key to save the changes.

*CMS* deletes the task from the timetable, the tasks are renumbered, the timetable is saved, and the status line displays a **Successful** message.

13. Select the Exit SLK to close the Timetable: Get Contents window.

# **Deleting a timetable**

This topic provides the procedure for deleting a timetable.

#### Before you begin

Only the owner of the timetable or an administrator can delete timetables.

#### Steps

To delete a timetable:

1. From the CMS Main Menu, select the Keep Screen-Labeled Key (SLK).

2. Select Timetable and press the Enter key.

CMS displays the Timetable window.

Timetable	test.
	Add
Timetable name:	Сору
Description:	Delete
	Find one
User ID: cms	Get contents
Start time:	Global edit
Start date:	List all
Frequency and attributes (Select only one):	Modify
<x> Once</x>	Next
<pre></pre>	Previous
	i
<_> Hourly, Stop time: <u>11:59 PM</u> <_> Daily,	
Hourly/Daily Days (Select any you wish):	
[ <u>x]</u> Sunday [ <u>x]</u> Tuesday [ <u>x</u> ] Thursday	[ <u>x</u> ] Saturday
[ <u>x]</u> Monday [ <u>x]</u> Wednesday [ <u>x</u> ] Friday	
This timetable will run on this or another CMS serv	er
<_> Run only on this CMS server*	
$< \underline{\mathbf{x}} >$ Run on this or another CMS server*	
*These fields not used for Find one or List all	
	21x68

3. Press Ctrl + Z.

The fields in the window are cleared of all default information.

- 4. In the **Timetable name:** field, enter the name of the timetable containing the tasks to modify globally.
- 5. Press the Enter key.

CMS shifts focus to the action list.

6. Using the arrow keys, highlight **Find one** and press the **Enter** key.

*CMS* locates the timetable and populates the remaining fields with the information from the timetable.

7. Press the Enter key.

CMS shifts focus to the action list.

8. Using the arrow keys, highlight **Delete** and press the **Enter** key.

CMS displays a confirmation window.

9. Press the **Y** key for 'Yes' and then the **Enter** key.

CMS deletes the timetable and a successful message is displayed in the status line.

# Shortcuts

A shortcut is similar to a timetable except that it is not run based on time but rather when it is executed by a user. A shortcut is a fast and easy way for an ASCII terminal user to select windows that are used often. For example, you can create a shortcut for two different real-time reports that you normally view throughout the day. The shortcut displays these reports, fills out the input windows, and places them on the terminal screen so that they can both be viewed at once. Although useful for other tasks, shortcuts are most commonly used to run real-time reports.

This section contains the following topics:

- Before you begin on page 642
- Permissions on page 643
- Creating a shortcut on page 643
- Adding tasks to a shortcut on page 645
- Running a shortcut on page 646
- Modifying a shortcut description on page 647
- Copying a shortcut on page 648
- Copying shortcut tasks on page 649
- Modifying shortcut tasks on page 651
- Deleting shortcut tasks on page 652
- Deleting a shortcut on page 653

# Before you begin

The following items should be read and understood before working with shortcuts:

- Shortcuts are only available through the ASCII interface to CMS.
- Each user can create a maximum of ten shortcuts.
- Once a shortcut has started running, it cannot be stopped.
- Shortcuts can be copied from those created by other users.
- You cannot exceed your maximum allowable window count by using a shortcut.
- You cannot create a custom report using a shortcut.
- When using the **Keep** mode to record the tasks for a shortcut, the **Current** Screen-Labeled Key (SLK) will only shift focus between windows in the shortcut window. It will not shift focus to windows that were open before you entered **Keep** mode.

- When you create a shortcut, tasks that have errors in them are saved, but they will not
  execute when the shortcut is run. The task containing the error will display an error
  message which causes the shortcut to stop. The error must be corrected before the
  shortcut can run properly. To delete the error, exit the shortcut without saving changes
  or edit the shortcut if the error has already been saved.
- Deleting a CMS user who owns shortcuts results in those shortcuts also being deleted.

## **Permissions**

Depending on the procedure that you want to perform, you need the following permissions:

- All users are allowed to create shortcuts.
- You must have *read* and *write* permissions for any *CMS* subsystems and ACD entities associated with the tasks included in a shortcut.
- Users without the *Administrator* permission can view and copy the shortcuts of other users, but they cannot add, modify, or delete those shortcuts.
- If the access permissions for a user are changed, it could cause the shortcuts of that user to not run properly. For example, removing skill permissions for a user can result in a shortcut report not running or displaying data for that skill.

## Creating a shortcut

This topic provides the procedure for creating a shortcut and adding tasks for it to perform.

#### Steps

To create a shortcut:

1. From the CMS Main Menu, select the Keep Screen-Labeled Key (SLK).

2. Select Shortcut and press the Enter key.

CMS displays the Shortcut window.

Shortcut name:	Add
Shortcut name:	
	Copy
Description:	Delete
	Find one
User ID: cms	Get contents
	List all
	Modify
	Next
	Previous

The **User ID**: field shows the ID of the user who ran this command. Unless you have *Administrator* permissions, you will not be able to create a shortcut for another user.

3. In the Shortcut name: field, enter a unique name for this shortcut.

Keep the name for the shortcut simple as it becomes the name that must be entered when you wish to execute it from the *CMS* **Main Menu**.

4. In the **Description:** field, enter a brief description for the shortcut.

This field is optional.

5. Press the Enter key.

CMS shifts focus to the action list.

6. Highlight the Add item and press the Enter key.

CMS displays the Main Menu. CMS is now in Keep mode.

- 7. Use the **Main Menu** to select tasks. Multiple windows can be shown on the screen at one time.
- 8. Use the **Move** and **Size** items from the **Window** SLK menu to adjust the placement and dimensions of each window.
- 9. When satisfied with the report windows, input windows, and their placement and sizes on the screen, select the **Stop** item from the **Keep** SLK menu.

CMS displays a confirmation window asking if the shortcut should be saved.

10. Press the Y key for 'Yes' and then Enter to save the shortcut.

*CMS* displays the **Shortcut** window again and the status line displays a **Successful** message indicated that the shortcut was saved.

11. Select the Exit SLK to close the Shortcut window and return to the Main Menu.

# Adding tasks to a shortcut

This topic provides the procedure for adding tasks to an existing shortcut.

#### Steps

To add tasks to a shortcut:

- 1. From the CMS Main Menu, select the Keep Screen-Labeled Key (SLK).
- 2. Select Shortcut and press the Enter key.

CMS displays the Shortcut window.

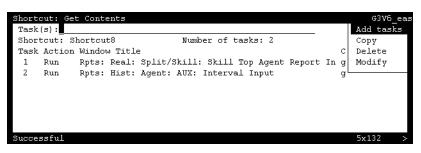
	test:
Shortcut name: Description: User ID: <u>cms</u>	Add Copy Delete Find one Get contents List all Modify Next Previous

- 3. In the **Shortcut name:** field, enter the name of the shortcut which will have new tasks added.
- 4. Press the Enter key.

CMS shifts focus to the action list.

5. Highlight Get contents and press the Enter key.

CMS displays the Shortcut: Get Contents window.



6. In the Task(s): field, enter the number of the task that the new task will follow.
To add a task in the second position of the shortcut, enter 1 in the Task(s): field.
If you wish the new task to be in the first position, leave the Task(s): field blank.

7. Press the **Enter** key.

CMS shifts focus to the action list.

8. Highlight Add tasks and press the Enter key.

CMS displays the Main Menu.

9. On the **Main Menu**, use the normal menu items to perform the tasks you want to add to the shortcut.

When you have made and validated each action list selection, **Entries Stored** displays on the status line.

10. When you have finished performing tasks for the shortcut, select **Stop** from the **Keep** SLK menu.

CMS displays a confirmation asking if the changes should be saved.

11. Press the Y key for 'Yes' and then the Enter key.

CMS saves the tasks and displays the Shortcut: Get Contents window.

12. Select the Exit SLK to close the Shortcut: Get Contents window.

### **Running a shortcut**

This topic provides the procedure for executing a shortcut.

### Steps

To run a shortcut:

1. At the CMS Main Menu, press the ; (semicolon) key.

CMS selects the command line of the Main Menu.

MainMenu Reports>		
Dictionary>		
Exceptions>		
Agent Administration>		
Call Center Administration>		
Custom Reports>		
User Permissions>		
System Setup>		
Maintenance>		
Logout		
<u>;</u>		

2. Enter the name of the shortcut to run and press the Enter key.

The shortcut starts running and locks the keyboard until the shortcut finishes. When the shortcut finishes, the status line displays a **Successful** message.

# Modifying a shortcut description

This topic provides the procedure for editing the name or description of a shortcut.

#### Steps

To edit a shortcut:

- 1. From the CMS Main Menu, select the Keep Screen-Labeled Key (SLK).
- 2. Select **Shortcut** and press the **Enter** key.

CMS displays the **Shortcut** window.

Shortcut	test
	Add
Shortcut name:	Copy
Description:	Delete
	Find one
User ID: cms	Get contents
	List all
	Modify
	Next
	Previous
	Previous

- 3. In the **Shortcut name:** field, enter the name of the shortcut to modify.
- 4. Press the Enter key.

CMS shifts focus to the action list.

5. Highlight **Find one** and press the **Enter** key.

*CMS* retrieves the shortcut and populates the **Description**: and **User ID**: fields with information from the shortcut.

- 6. Make the necessary change to the **Description:** field.
- 7. Press the Enter key.

CMS shifts focus to the action list.

8. Highlight **Modify** and press the **Enter** key.

*CMS* saves the changes to the shortcut displays a **Successful** message in the status line.

9. Select the Exit SLK to close the Shortcut window.

# Copying a shortcut

This topic provides the procedure for copying an existing shortcut into a new shortcut. All users can copy shortcuts owned by other users. However, no shortcuts owned by your user ID, even as an *Administrator*, can be copied by you to another user. It is not possible to copy a shortcut over an existing shortcut.

#### Steps

To copy a shortcut:

- 1. From the CMS Main Menu, select the Keep Screen-Labeled Key (SLK).
- 2. Select **Shortcut** and press the **Enter** key.

CMS displays the **Shortcut** window.

Shortcut	test 1
	Add
Shortcut name:	Сору
Description:	Delete
	Find one
User ID: cms	Get contents
	List all
	Modify
	Next
	Previous

- 3. In the **Shortcut name:** field, enter the name of the new shortcut that will be created.
- 4. In the **Description:** field, enter a brief phrase identifying the new shortcut.

This field is optional.

- 5. In the **User ID:** field, ensure your user ID is present.
- 6. Press the Enter key.

CMS shifts focus to the action list.

7. Highlight **Copy** and press the **Enter** key.

CMS displays the Shortcut: Copy window.

Shortcut: Copy	test1
Copy from: ∎ User ID:	Сору

- 8. In the Copy from: field, enter the name of the shortcut to copy as the new shortcut.
- 9. In the User ID: field, enter the ID of the user that owns the shortcut to copy.

10. Press the Enter key.

CMS shifts focus to the action list.

11. Press the **Enter** key again.

*CMS* creates the new shortcut, closes the **Shortcut: Copy** window, and displays a **Successful** message in the status line.

12. Select the Exit SLK to close the Shortcut window.

## Copying shortcut tasks

This topic provides the procedure for copying tasks within a shortcut.

#### Steps

To copy a shortcut task:

- 1. From the CMS Main Menu, select the Keep Screen-Labeled Key (SLK).
- 2. Select **Shortcut** and press the **Enter** key.

CMS displays the **Shortcut** window.

	test 1
	Add
t name:	Сору
tion:	Delete
	Find one
: cms	Get contents
	List all
	Modify
	Next
	Previous
	Previous

- 3. In the **Shortcut name:** field, enter the name of the shortcut in which a task will be copied.
- 4. Press the Enter key.

CMS shifts focus to the action list.

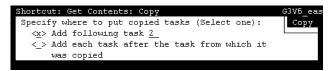
5. Highlight **Get contents** and press the **Enter** key.

CMS displays the Shortcut: Get contents window.

Shortcut: G Task(s):	et Contents				G3V6_e: Add tasks
Shortcut:	Shortcut8 n Window Title	Number of tasks: 2		c	Copy Delete
1 Run 2 Run	Rpts: Real:	Split/Skill: Skill Top Agen Agent: AUX: Interval Input	t Report	In g	Modify
2 Kun	кроз. пізс.	Agent: Mox: Interval input		g.	
Successful					5x132

- 6. In the **Task(s):** field, enter the number of the task to copy and press the **Enter** key. *CMS* shifts focus to the action list.
- 7. Highlight Copy and press the Enter key.

CMS displays the Shortcut: Get Contents: Copy window.



- 8. Place an  $\mathbf{x}$  in one of the following options:
  - Add following task This option will create the task after the task number specified in the field to the right.
  - Add each task after the task from which it was copied This option will create the task and place it immediately following the original task. If you specified to make a copy of task #1, the copy will be created as task #2. Any other tasks are shifted to a higher number to accommodate this action.
- 9. Press the **Enter** key.

CMS shifts focus to the action list.

10. Press the Enter key again.

*CMS* copies the original task, creates the new task, closes the **Shortcut: Get Contents: Copy** window, and displays a **Successful** message in the status line.

If any sort of error occurs, the status line will display **Failed** and *CMS* displays an error message describing the nature of the error.

11. Select the Exit SLK to close the Shortcut: Get Contents window.

## Modifying shortcut tasks

This topic provides the procedure for editing tasks within a shortcut.

#### Steps

To modify a shortcut task:

- 1. From the CMS Main Menu, select the Keep Screen-Labeled Key (SLK).
- 2. Select Shortcut and press the Enter key.

CMS displays the Shortcut window.

Shortcut name:	Add
Description:	Copy Delete
User ID: cms	Find one Get contents List all
	Modify Next Previous

- 3. In the **Shortcut name:** field, enter the name of the shortcut where tasks will be modified.
- 4. Press the Enter key.

CMS shifts focus to the action list.

5. Highlight Get contents and press the Enter key.

CMS displays the Shortcut: Get Contents window.

Shortcut: Get Contents	G3V6_eas
Task(s):	Add tasks
Shortcut: Shortcut8 Number of tasks: 2	Copy
Task Action Window Title C	Delete
1 Run Rpts: Real: Split/Skill: Skill Top Agent Report In g	Modify
2 Run Rpts: Hist: Agent: AUX: Interval Input g	_
Successful	5x132 >

In the Task(s): field, enter the number of the task to modify and press the Enter key.
 CMS shifts focus to the action list.

7. Highlight Modify and press the Enter key.

CMS displays the input window of the specified task.

- 8. Change the input parameters of the window as necessary. For example, this might include changing the split, agent, or another entity on which a report is based. This can also include making changes to the size and position of the task window.
- 9. When the appropriate information has been entered, press the Enter key.

CMS shifts focus to the action list.

10. Highlight **Modify** and press the **Enter** key.

CMS displays a confirmation asking if the changes should be saved.

11. Press the **Y** key for 'Yes' and then the **Enter** key.

*CMS* saves the changes to the task, closes the task window, and displays a **Successful** message in the status line.

12. Select the Exit SLK to close the Shortcut: Get Contents window.

## **Deleting shortcut tasks**

This topic provides the procedure for deleting a task from a shortcut.

#### Steps

To delete a shortcut task:

- 1. From the CMS Main Menu, select the Keep Screen-Labeled Key (SLK).
- 2. Select Shortcut and press the Enter key.

CMS displays the **Shortcut** window.

Shortcut	test 1
	Add
Shortcut name:	Сору
Description:	Delete
	Find one
User ID: <u>cms</u>	Get contents
	List all
	Modify
	Next
	Previous

3. In the **Shortcut name:** field, enter the name of the shortcut containing the task to delete.

4. Press the Enter key.

CMS shifts focus to the action list.

5. Highlight **Get contents** and press the **Enter** key.

CMS displays the Shortcut: Get Contents window.

Task(s):				Add ta	asks
Shortcut	: Shortcut8	Number of tasks: 2		Copy	
Task Act	ion Window Ti	:le		C Delete	2
1 Run	Rpts: Rea	L: Split/Skill: Skill Top Agent Report	: In	g Modify	7
2 Run	Rpts: His	: Agent: AUX: Interval Input		g L	

- 6. In the **Task(s):** field, enter the number of the task to delete.
- 7. Press the Enter key.

CMS shifts focus to the action list.

8. Highlight **Delete** and press the **Enter** key.

*CMS* displays a confirmation window asking if the changes to the shortcut should be saved.

9. Press the Y key for 'Yes' and then the Enter key.

CMS deletes the specified tasks and displays the Shortcut: Get Contents window.

10. Select the Exit SLK to close the Shortcut: Get Contents window.

## **Deleting a shortcut**

This topic provides the procedure for deleting a shortcut from the CMS server.

#### Steps

To delete a shortcut:

1. From the CMS Main Menu, select the Keep Screen-Labeled Key (SLK).

2. Select **Shortcut** and press the **Enter** key.

CMS displays the Shortcut window.

Shortcut	test1
	Add
Shortcut name:	Сору
Description:	Delete
	Find one
User ID: <u>cms</u>	Get contents
	List all
	Modify
	Next
	Previous

3. In the **Shortcut name:** field, enter the name of the shortcut to delete.

Shortcuts owned by other users cannot be deleted.

4. Press the **Enter** key.

CMS shifts focus to the action list.

5. Highlight **Find one** and press the **Enter** key.

*CMS* retrieves the information for the specified shortcut. If the shortcut with the name specified cannot be found, this will be indicated on the status line.

6. Verify that this is the shortcut to be deleted and press the **Enter** key.

CMS shifts focus to the action list.

7. Highlight **Delete** and press the **Enter** key.

CMS displays a confirmation window.

8. Press the **Y** key for 'Yes' and then the **Enter** key.

*CMS* deletes the specified shortcut and displays a **Successful** message in the status line.

#### . . . . . .

# Glossary

abandoned call	A call on which a caller hangs up before an agent answers.
abandoned call search	An ACD capability that enables the system to verify that the caller is still on the line before passing the call to an agent.
acceptable service level	1) A target value for the acceptable amount of time before an agent answers a call.
	<ul><li>2) A percentage of calls answered within a set amount of time (for example, 80% of calls answered within 20 seconds).</li></ul>
access permissions	Permissions assigned to a <i>CMS</i> user so that the user can access different <i>CMS</i> capabilities or administer specific elements such as splits/skills, trunks, or vectors. Access permissions can be read, write, or exceptions. See also read permission, write permission.
ACD	See Automatic Call Distribution (ACD)
ACD call	1) A call that queues to a split/skill and is answered by an agent in that split/ skill.
	2) A call that queues as a direct agent call and is answered by the agent for whom it was queued.
Action List	A menu in the upper right-hand corner of most <i>CMS</i> ASCII screens. The menu lists the actions available for that particular window.
active VDN calls	A Call Vectoring feature on Communication Manager systems that provides conditional branching to a different step in the same vector or to a different vector, based on the number of incoming trunk calls a VDN is processing in a vector or at an agent position. Also called <i>counted calls to VDN</i> .
ACW	See after call work (ACW)
Adjunct/Switch Applications Interface (ASAI)	A recommendation for interfacing adjuncts and communications systems that is based on the CCITT Q.932 specification for layer 3. ASAI supports activities such as event notification and call control.

after call work (ACW)	An agent state consisting of work related to the preceding ACD call. If an agent hangs up after an ACD call, the agent is in ACW. ACW is also accessible by a button on the agent's set and does not have to be related to an ACD call.
agent	A person or VRU port that answers calls to an ACD split/skill. The agent is represented to <i>CMS</i> by a login identification keyed into a voice terminal.
agent login ID	A 1- to 9-digit number keyed by an ACD agent from a voice terminal to activate the agent position. Agent logins are needed for all <i>CMS</i> -measured ACD agents.
agent occupancy	The percentage of time that you expect or target for each split/skill agent to spend on ACD calls and in ACD while logged in.
agent position (EAS)	The combination of the agent login ID and the skills the agent is assigned. Data is collected for the agent by skill so that the total work for the agent is the sum of all skills in which the agent worked.
agent position (non-EAS)	The combination of the agent login ID and the split the agent logged into. Agents logged into multiple splits are associated with multiple positions. Call data is collected separately for each agent/split combination.
agent role	A description of the kind of service an agent in multiple skills give for one of these skills. Agent role is a combination of call-handling preference and skill/ reserve levels.
agent skill	An attribute that is associated with an ACD agent and that qualifies the agent to handle calls requiring the attribute. An agent can be assigned up to 60 skills; for example, the ability to speak a particular language or the expertise to handle a certain product.
	See also primary skill, secondary skill, and skill level
agent state	A feature of agent call handling that allows agents to change their availability to the switch; for example, ACW, AVAIL, AUX.
agent terminal	The voice terminal used by a contact center agent.
agent trace	A CMS capability that allows you to trace agent activities such as state changes which can then be shown in a report.
AI	See <u>Auto-in (AI)</u> .
ANI	See Automatic Number Identification (ANI).

announcement	A recorded voice message that typically identifies the call's destination, asks the caller to stay on the line, and describes the product or service offered. With the Call Vectoring feature, announcements can be part of a vector's call processing.
ASA	See Average Speed of Answer (ASA).
ASAI	See Adjunct/Switch Applications Interface (ASAI).
auto-available split	An ACD capability that enables VRUs such as the <i>CONVERSANT</i> ® Voice Information System to be brought online again immediately after a power failure or system restart without time-consuming reprogramming.
Auto-in (Al)	An ACD work mode that makes the agent available to receive calls and allows the agent to receive a new ACD call immediately after disconnecting from the previous call.
Automatic Call Distribution (ACD)	1) A switch feature that channels high-volume incoming and outgoing call traffic to agent groups (splits or skills).
	2) An agent state in which the extension is engaged on an ACD call.
Automatic Number Identification (ANI)	An industry term for notification of the calling party number (CPN). When the calling party is connected through a switch, the CPN can be either a billing number for the switch or the station identification (SID) number.
AUX	See auxiliary work (AUX).
AUX reason codes	Codes that enable a contact center to track an agent's time more precisely when the agent is in the AUX state. Agents can specify why they are in the AUX state - for example, on break or in a meeting.
auxiliary work (AUX)	An agent state in which the agent is doing non-ACD work, is on break, or is in a meeting. Agent enter AUX work by pressing the AUX WORK button or dialing the access code from their voice terminal. Agents can also enter AUX work by going off-hook to make or answer an extension call while in AVAIL mode or with a call on hold.
AVAIL	See <u>available (AVAIL)</u> .
available (AVAIL)	An agent work mode in which the extension can accept an ACD call. The agent enters this state by selecting the AI (auto-in) or MI (manual-in) work mode.

#### average agent service time

average agent service time	The average time you are expecting or targeting each agent to spend on an ACD call including talk time and ACW time.
Avaya Business Advocate	A set of features designed to enhance call and agent selection in a contact center.
Avaya Interactive Response	A powerful voice-response system that may include automated call routing, announcement storage, message retrieval, and callback. Used to be called CONVERSANT.
Average Speed of Answer (ASA)	The average time a caller waits in queue before connecting to an agent. The ASA for a split/skill includes the time spent in queue and the time ringing an agent. The ASA for a VDN includes the time spent in vector processing including the time spent in queue and the time ringing for the VDN that the call was answered in.
backup	The process of protecting data by writing the contents of the disk to an archive, such as tape, that can be removed from the computer environment and stored safely.
calculation	A formula for representing contact center entities in the Dictionary. Calculations generate the date for fields in a report.
call-based items	The category of database items in <i>CMS</i> that are entered in the database after a call completes. If a call starts and ends in different intrahour intervals, the call-based data is recorded for the interval in which the call completed. Most database items are call-based.
call-handling performance	A parameter of agent administration in an EAS environment that specifies how calls are selected for the agent.
call-handling profile	A set of objectives describing how a split/skill handles calls. Call-handling profiles are part of the <i>Avaya CMS Forecast</i> product.
Call Prompting	A switch feature that routes incoming calls based on information supplied by the caller such as an account number. The caller hears an announcement and is prompted to select an option from those listed in the announcement.
Call Vectoring	A switch feature that provides a highly flexible method for processing ACD calls using VDNs and vectors as processing points between trunk groups and splits. Call Vectoring permits a treatment of calls that is independent of splits.
Call Work Code (CWC)	An ACD capability that allows the agent to enter a string of digits during or after the call and send them to CMS for management reporting.

calls carried	The number of inbound/outbound calls carried by a trunk.
change agent skills	A <i>CMS</i> capability that allows you to change a single agent's skill assignment or apply an agent template to up to 50 agents.
Call Management System (CMS)	A software product used to connect to a switch that monitors and records data for large volumes of telephone calls that are processed through the ACD feature of the switch.
CMSADM backup	A backup that saves all the file systems on the CMS server including the Solaris operating system, CMS programs, CMS data, and non-CMS data.
CONN	See <u>connected (CONN)</u> .
connected (CONN)	A trunk state in which a caller and an agent are connected on an ACD call.
connected call	A non-ACD call connected to an agent through a VDN and for which <i>CMS</i> receives an indication that the call rang or was answered.
CONVERSANT	See Avaya Interactive Response.
current	A CMS operation that displays data from the current interval.
current interval	The current intrahour period of time (15, 30, or 60 minutes) which is archived to the historical database when the period expires. The current interval is part of the real-time database.
current wait time	The time a call has waited for service in a call queue adjusted for queue priority.
custom report	A real-time or historical report that has been customized from standard reports or created by the user through the Custom Reports subsystem of <i>CMS</i> .
CWC	See Call Work Code (CWC).
DABN	See dequeued and abandoned (DABN).
DACD	See direct agent ACD (DACD).
DACW	See direct agent ACW (DACW).
daily data	Interval data that has been converted to a 1-day summary.

#### data collection

data collection	This <i>CMS</i> feature can be used to determine if call activity and the associated ACD data is recorded. In many maintenance operations, it is necessary to disable data collection. If data collection is turned off, <i>CMS</i> does not void data on current call activity.
database	The <i>CMS</i> databases are used to store ACD data according to a specific time period. This can be current and previous intrahour real-time data or intrahour, daily, weekly, and monthly historical data.
database item	A name for a specific type of data stored in one of the <i>CMS</i> databases. A database item can store ACD identifiers such as split numbers or names, login IDs, and VDNs or statistical data on ACD performance such as number of ACD calls, wait time for calls in queue, current states of individual agents, and so forth.
database tables	Each <i>CMS</i> database can consist of several database tables which are used to logically separate data based on different criteria. For example, historical reports can be used to display data on a daily, weekly, or monthly basis; each of these different time measurements are stored in separate database tables.
DDC	See direct department calling (DDC).
dequeued and abandoned (DABN)	A trunk state in which the trunk quickly goes idle after the caller abandons the call.
designer reports	Customized reports that you create and run through Avaya CMS Supervisor Report Designer. See the Avaya CMS Supervisor Report Designer User Guide for more information.
Dictionary	A CMS capability used to assign easily-interpreted names to contact center entities such as login IDs, splits/skills, trunk groups, VDNs, and vectors.
DID	See direct inward dialing (DID).
Digital Subscriber Line (DSL)	A public switched telephone network (PSTN) line that provides high bandwidth for short distances using copper cable. This type of line operates at the Basic Rate Interface (BRI) with two 64-kilobit per second circuit-switched channels and one 16-kilobit packet-switched channel. DSL can carry both data and voice signals at the same time.
direct agent ACD (DACD)	An agent state in which the agent is on a direct agent ACD call.
direct agent ACW (DACW)	An agent state in which the agent is in the after call work (ACW) state for a direct agent ACD call.

direct agent calling	An EAS capability that allows a caller to reach the same agent every time and allows the contact center to include the call as an ACD call in management tracking. This is ideal for claims processing in which a client needs to speak with the agent handling the claim. It also ensures a high level of customer service without reducing management control.
direct department calling (DDC)	A non-EAS option to select an agent when more than one agent is available. The call goes to the agent closest to the top of an ordered list.
direct inward dialing (DID)	The use of an incoming trunk used for dialing directly from the public network into a communications system without help from the attendant.
DSL	See Digital Subscriber Line (DSL).
EAS	See Expert Agent Selection (EAS).
entity	A generic term for an agent, split/skill, trunk, trunk group, VDN, or vector.
EWT	See expected wait time (EWT).
exception	Activity in an ACD which falls outside the limits you have defined and usually indicates abnormal or unacceptable performance of the ACD, agents, splits/ skills, VDNs, vectors, trunks, or trunk groups. The parameters used to determine the occurrence of an exception are defined in the Exceptions subsystem of <i>CMS</i> .
exception permissions	The rights that a user has in being notified or viewing the instances where calls, contact center entities, or subsystems operated above or below specified thresholds.
expected wait time (EWT)	An estimate of how long a caller will have to wait to be served by a contact center while in queue. EWT is based on current and past traffic, handling time, and staffing conditions. Time spent in vector processing before being queued and time spent ringing an agent with manual answering is not included in the EWT. This is switch-based calculation.
Expert Agent Selection (EAS)	An optional Communication Manager feature that routes incoming calls to an agent who is a member of the specific skill required to handle the problems of the caller.
extension call	A call originated by an agent or a non-ACD call received by an agent. Extension calls include calls an agent makes to set up a conference or transfer.
FBUSY	See forced busy (FBUSY).

FDISC

FDISC	See forced disconnect (FDISC).
flex agents	Agents who have the role of roving, backup, or allocated. Top and reserve agents are not flex agents. See the <i>Avaya Business Advocate User Guide</i> for more information.
flexible routing	An ACD capability that allows you to choose how incoming calls should be routed to agents in a split. Calls can be routed to the first available agent or to the most-idle agent.
forced busy (FBUSY)	A trunk state in which the caller receives a forced busy signal.
forced disconnect (FDISC)	A trunk state in which the caller receives a forced disconnect.
Forced Multiple Call Handling (FMCH)	A feature available for Communication Manager system which, when activated for a split/skill, allows calls to be automatically delivered to an idle line appearance if the agent is in the AI (auto-in) or MI (manual-in) work mode and if an unrestricted line appearance is available on the voice terminal.
Forecast, Avaya CMS	An Avaya product used to generate reports displaying expected call traffic and agent/trunk group requirements for the contact center for a particular day or period in the future.
historical database	A CMS database consisting of intrahour records for up to 62 days, daily records for up to 5 years, and weekly/monthly records for up to 10 years for each CMS-measured agent, split/skill, trunk, trunk group, VDN, and vector.
historical reports	Reports of past ACD data for various agent, split/skill, trunk, trunk group, VDN, or vector activities. Historical reports summarize call data into daily, weekly, or monthly totals.
HOLD	A trunk state in which an agent has put a call on this trunk on hold.
IDLE	A trunk state in which this trunk is not in use and is waiting for a call.
II	See Information Indicator (II).
Inbound Call Management (ICM)	A set of switch and adjunct features using ASAI to enable the adjunct to provide automatic screen delivery and call routing.
Information Indicator (II)	A 2-digit code that identifies the type of originating line for incoming ISDN PRI calls, such as hotel or pay phone.

INFORMIX A relational database management system used to store and retrieve CMS data. INFORMIX SQL An interactive interface typically used to view the INFORMIX database. **Integrated Services** A digital standard for telephony that enables analog and digital signals on the Digital Network (ISDN) same line. interval ASA The average time a call waits in queue before connecting to an agent, calculated on reporting interval boundaries. Interval ASA is cleared to zero at the start of each reporting interval. See also Average Speed of Answer (ASA) and rolling ASA. interval-based items A category of database items that represent the amount of time during a collection interval spent on a particular activity. Interval-based items are updated throughout the collection interval and timing is restarted at the end of the interval. intrahour interval A 15-, 30-, or 60-minute segment of time starting on the hour. An intrahour interval is the basic unit of CMS report time. ISDN See Integrated Services Digital Network (ISDN). LAN See local area network (LAN). local area network A private interactive communication network that allows computers and compatible devices to communicate over short distances, usually less than (LAN) one mile, at high data transfer rates. Logical Agent An EAS feature that associates an agent's login ID with a physical extension when the agent logs in. Properties such as the assigned skills, class of restriction, and coverage path are associated with the login ID rather than the physical extension. This allows agents to log in at any available set. LOGOFF An agent trace work mode in which an agent is logged out and not available to take ACD calls. LOGON An agent trace work mode in which an agent is logged in and available to take ACD calls. logout reason codes Codes that enable an agent to specify the reason for logging out such as the end of a shift or for training.

Look Ahead Interflow (LAI)	A switch feature that can be used to balance the call load among multiple contact centers. LAI works with Call Vectoring and ISDN PRI trunks to intelligently route calls between contact centers. This allows multiple contact centers to share workloads, expand hours of coverage, and allows calls o be transparently handled by contact centers in different time zones.
maintenance	A <i>CMS</i> subsystem that is used for routine maintenance of <i>CMS</i> , such as backing up data, checking on the status of the connection to the switch, and scanning the error log.
maintenance busy (MBUSY)	A trunk state in which the trunk is out of service for maintenance purposes.
Manual-In (MI)	An ACD work mode in which an agent is available to receive an ACD call and is automatically placed into the ACW state upon release from the call.
MBUSY	See maintenance busy (MBUSY).
МСН	See Multiple Call Handling (MCH).
measured	A term meaning that an ACD element such as agent, split/skill, trunk, trunk group, VDN, or vector that is identified to <i>CMS</i> for data collection. If the ACD element is not measured, no data is collected.
МІ	See Manual-In (MI).
MIA	See Most Idle Agent (MIA).
monthly data	Daily data that has been converted to a monthly summary.
Most Idle Agent (MIA)	An ACD distribution method that maintains a queue of idle agents. An agent is put at the end of the list for a particular split when the agent completes an ACD call for that split. The agent continues to advance on the list as long as he or she remains staffed and in ACW, AVAIL, or on AUXIN/OUT extension calls from the AVAIL mode.
Multiple Call Handling (MCH)	A process in which an agent receives an ACD call while other calls are active on the agent's station. The agent must put the current call on hold and press Auto-In/Manual-In to receive another ACD call.
multiple split queuing	A Call Vectoring capability that directs a call to up to three splits at the same time, with the first agent who is free receiving the call.
multi-user mode	A CMS state in which any administered user can log into CMS and data continues to be collected if the data collection feature is enabled.

name (synonym) fields	A field in which you can input a name (synonym) that you have entered in the Dictionary. For example, you can input names of agents, splits/skills, agent groups, trunk groups, VDNs, or vectors.
night service	A switch capability that enables calls that arrive after business hours or on weekends to be automatically re-routed to a split, an announcement, or an alternate destination set up for after-hours coverage.
nonprimary split/skill	The second and third splits/skills to which a call queued to multiple splits/ skills queues in a VDN. Also called secondary and tertiary split/skill, respectively.
OTHER	An agent work mode in which the agent is on a direct agent call, on a call for another split or skill, or has put a call on hold and has not chosen another work mode.
Outbound Call Management (OCM)	A set of switch and adjunct features using ASAI that distributes outbound calls initiated by an adjunct to internal extensions (usually ACD agents).
phantom abandon call timer	A <i>CMS</i> capability that tracks information about abandoned calls. When the phantom abandon call timer is enabled, calls with a duration shorter than the administered value (0 to 10 seconds) are counted as phantom abandon calls. Setting the timer to 0 disables this capability.
percent within service level	The percentage of calls that you are expecting or targeting to be answered by an agent within a specific number of seconds.
previous interval	An intrahour interval that is part of the real-time database. At the end of each intrahour interval, the contents of the current intrahour interval are copied to the previous intrahour interval portion of the real-time database.
primary skill	A skill assigned to an agent as that agent's strongest skill. Primary skills are the areas in which the agent has the most expertise.
pseudo-ACD	An area created on <i>CMS</i> to place previously backed-up ACD data. A pseudo-ACD is not a live (real) ACD and does not communicate with any switch.
queue	A holding area for calls waiting to be answered in the order in which they were received. Calls in a queue may have different priority levels, in which case, calls with a higher priority are answered first.
QUEUED	A trunk state in which an ACD call has seized the trunk and is queued to a split/skill, waiting for an agent to answer.

#### read permission

read permission	A permission with which a <i>CMS</i> user can access and view data; for example, running reports or viewing the Dictionary subsystem.
real-time database	A <i>CMS</i> database consisting of the current intrahour data on each CMS-measured agent, split, trunk, trunk group, VDN, and vector.
real-time reports	A report that shows ACD call activity on agents, split/skills, trunks, trunk groups, VDNs, and vectors for the current or previous intrahour interval.
Redirect On No Answer	An ACD capability that assist the user if a call is not answered in a specified number of rings. The terminal extension, including ports with VRUs, is busied out and the call goes back into the queue at top priority.
refresh rate	The number of seconds that <i>CMS</i> should wait for each update of real-time report data.
reserve agent	An agent whose skills are set so that they do not have a top skill, but are used to handle calls when all other agents of that skill are unavailable. Reserve agents are used for high-priority skills where customers must not wait for long periods of time.
RINGING	<ol> <li>An agent state consisting of the time a call rings at an agent's voice terminal after leaving the queue and before the agent answers the call.</li> <li>A trunk state in which a call is ringing at the agent's voice terminal.</li> </ol>
rolling ASA	A running, weighted, average calculation made without using interval boundaries. Rolling ASA is used for vector routing; it is calculated on the Communication Manager system and set to <i>CMS</i> .
scripting	A <i>CMS Supervisor</i> capability that allows you to automate operations such as changing an agent's skills, running a report, and exporting report data.
secondary skill	A skill assigned to an agent in a subject that is not that agent's strongest area of expertise. Secondary skills are used in Communication Manager systems with Expert Agent Selection (EAS).
SEIZED	A trunk state in which an incoming or outgoing call is using the trunk.
service level	A time, in seconds, within which all calls should be answered. Also called acceptable service level.
Service Observing - Remote	A feature that allows a user to dial into the switch and monitor a call.

Service Observing - VDNs	A feature available with Communication Manager systems that give a user the ability to monitor the treatment that a call receives as it is processed by a VDN.
shortcut	A series of tasks which, when run, are performed on the <i>CMS</i> server. Shortcuts are a fast, easy way to view windows every day for the same ACD entities.
single-user mode	A <i>CMS</i> mode in which only one administrator can log in to the <i>CMS</i> server. Data continues to be collected if the data collection feature is enabled.
skill	See agent skill.
skill level	A rating from 1 (highest) to 16 (lowest) that indicates an agent's level of expertise in handling calls for which that expertise is needed.
screen-labeled key (SLK)	The first eight function keys at the top of the keyboard that correspond to the screen labels at the bottom of the <i>CMS</i> ASCII terminal screen. The screen labels indicate each key's function.
split	A group of extensions that receive calls.
staffed agent	An agent who is currently logged in to the switch.
standard reports	The set of reports that are supplied with CMS or CMS Supervisor.
station	1) An unmeasured extension
	2) An extension that is not currently staffed by an agent or that is a member of an unmeasured split/skill.
switch	A system providing voice or voice/data communication services for a group of terminals.
timetable	A <i>CMS</i> feature that allows you to schedule one or more activities to run unattended. Timetables can be set to run once or at multiple times.
trunk	A telephone circuit that carries calls between two switches, between a central office and a switch, or between a central office and a telephone.
trunk group	A group of trunks that are assigned the same dialing digits: either a phone number or a direct inward dialed (DID) prefix.
uniform call distribution (UCD)	A method of call distribution in which the most idle agent for a skill receives the call (if the agent is available).

universal call identifier (UCID)	A number that uniquely identifies a call in a network of nodes that support UCID.
UNKNOWN	<ol> <li>An agent state in which CMS does not recognize the state of the agent.</li> <li>A trunk state in which CMS does not recognize the state of the trunk.</li> </ol>
UNSTAF	An agent state in which the agent is not logged in and, therefore, is not tracked by <i>CMS</i> .
VDN	See Vector Directory Number (VDN).
VDN calls-counted	See active VDN calls.
VDN or Origin Announcement (VOA)	A short announcement that is assigned to a VDN through switch administration. The VOA identifies the origin or purpose of a call for the contact center agent who answers the call.
VDN skill preference	A prioritized list of agent skills administered for a VDN that are needed or preferred for the answering agent. VDN skill preferences require a call to be routed to an ACD agent with a particular attribute or set of attributes.
vector	A list of steps that process calls according to a user definition. The steps in a vector can send calls to splits, play announcements and music, disconnect calls, give calls a busy signal, or route calls to other destinations based on specific criteria.
vector command	A step in a vector that describes the action to be executed for a call.
Vector Directory Number (VDN)	An extension number that enables calls to connect to a vector for processing. A VDN can connect calls to a vector when the calls arrive over an assigned automatic-in trunk group or when the calls arrive over a DID trunk group and the final digits match the VDN. The VDN by itself may be dialed to access the vector from any extension connected to the switch.
vector step	A single task within a vector that performs an action regarding a call. A vector step consists of a command with the possibility of one or more conditions or parameters, if necessary.
vector step condition	A condition accompanying a vector command that defines the circumstances in which the command is applied to a call.
VOA	See VDN or Origin Announcement (VOA).

**voice terminal** A telephone set, usually with buttons.

weekly data Daily data that has been converted to a weekly summary.

write permission A permission with which a *CMS* user can add, modify, or delete data and execute processes.

write permission

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