

Lucent Technologies
Bell Labs Innovations



***CentreVu*[®] Call Management System** **Release 3 Version 6**

Planning, Configuration and
Implementation

585-215-879
Comcode 108217530
Issue 1
May 1998

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CentreVu®
Call Management System
Release 3 Version 6
Planning, Configuration and Implementation

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Preface

General Information

The *CentreVu™ Call Management System Release 3Version 6 Planning, Configuration, and Implementation* document 585-215-879 is written for Lucent personnel involved in designing the *CentreVu® CMS R3V6* section of a call center. This document provides a description of *CentreVu CMS R3V6* offers and an explanation of how to configure them to best match any customer's requirements.

This document covers four areas. First, this document describes the *CentreVu CMS R3V6* offers. This document then explains what information is needed to choose an offer that best meets the customer's needs. Next, it describes how to enter that information into the Configurator. The last section of the document gives a general description of how to implement *CentreVu CMS R3V6*.

Organization of this Document

The following list describes the contents of each chapter in this document:

- Chapter 1* **Description of CentreVu CMS R3V6** — describes the *CentreVu* CMS R3V6 packages. Each package is designed to handle a larger number of agents than the previous package. The more agents a customer has, the larger the package the customer needs.
- Chapter 2* **CentreVu CMS R3V6 Features** — contains information about the additional items which customers can add to *CentreVu* CMS R3V6. It includes Supervisor, Call Vectoring, Graphics, Forecasting, Multiple Automatic Call Distribution (ACD), Expert Agent Selection (EAS) and External Call History.
- Chapter 3* **Planning CentreVu CMS R3V6 Call Centers** — provides the general information needed to design the *CentreVu* CMS R3V6 part of a new call center. This chapter includes information about switch compatibility, required hardware, required software, and miscellaneous components that can help customize call centers.
- Chapter 4* **Upgrade Packages** — describes information needed to design an efficient upgrade from a previous version of CMS. The oldest CMS version included is R3. The newest CMS version included is R3V5.
- Chapter 5* **U.S. Configuration of CentreVu CMS R3V6** —describes the AT&T Order Management System (ATTOMS) configurator for *CentreVu* CMS R3V6. It tells the reader how to access the configurator, which panels to select and the fields in the panels.
- Chapter 6* **Non-U.S. Configuration of CentreVu CMS R3V6** — describes the Order Management Interface (OMN)I Configurator. It tells the reader how to access the configurator, which panels to select and the fields in the panels.
- Chapter 7* **Implementing CentreVu CMS R3V6** — gives an overview of the provisioning process and how *CentreVu* CMS R3V6 is set up.

Conventions Used in This Document

The table below is an example of the text style conventions used in this document.

Style	Explanation
bold	Menu names, button names and option names are shown in bold. For example: Select Save from the File menu.
Courier font	Designates a word or phrase quoted directly from the CentreVu CMS system. For example, the <code>Report destination: field.</code>
Courier bold font	Designates a word or phrase quoted directly from the system. For example, type y to save timetable.
Chapter cross-references	Are placed in quotation marks. For example: see Chapter 3, "Optional Features," for more information.
<i>Italic</i>	Information placed in italics include: <ul style="list-style-type: none"> • references to file names and directions. For example, <i>/cms</i> • references to other documents. For example, <i>CentreVu Call Management System Release 3 Version 5 Administration</i> document. • Trademarks
Mouse button	Unless the right button is specified, use the left mouse button whenever you are instructed to click or select an item.
Window Titles	Are always capitalized.

Related Documents

The following documents may help you with the configuration of a *CentreVu CMS R3V6*:

- *CentreVu Call Management System Release 3 Version 6 Upgrades and Migrations* (Doc # 585-215-856) (Comcode 108144858)
- *CentreVu Call Management System Release 3 Version 6 Sun SPARCserver Computers Hardware Installation* (Doc # 585-215-857) (Comcode 108144874)
- *CentreVu Call Management System Release 3 Version 6 Sun SPARCserver Computers Connectivity Diagram* (Doc # 585-215-858) (Comcode 108145285)
- *CentreVu Call Management System Release 3 Version 6 Sun Enterprise 3000 Computer Hardware Installation* (Doc # 585-215-867) (Comcode 108145319)
- *CentreVu Call Management System Release 3 Version 6 Sun Enterprise 3000 Computer Connectivity Diagram* (Doc # 585-215-865) (Comcode 108145293)
- *CentreVu Call Management System Release 3 Version 6 Software Installation* (Doc # 585-215-866) (Comcode 108145301)
- *CentreVu Call Management System Release 3 Version 6 Hardware Maintenance and Troubleshooting* (Doc # 585-215-861) (Comcode 108145400)

Description of CentreVu CMS R3V6

General Information

CentreVu[™] Call Management System (CMS) R3V6 is a software application used by customers who process a large volume of calls through the Automatic Call Distribution (ACD) feature of a Lucent Technologies switch. *CentreVu* CMS R3V6 collects call-traffic data from the ACD. *CentreVu* CMS R3V6 generates real-time and historical reports based on the call-traffic data. These reports provide customers with information they can use to manage their call centers.

CMS administrators can access the database, customize reports, and also monitor call activities to determine the most efficient service possible for their customers. Split supervisors also have access to real-time and historical reports in order to effectively manage the performance of their personnel.

CentreVu CMS R3V6 interfaces with the *SOLARIS*^{*} 2.5.1 operating system and uses several *UNIX*[†] and *SOLARIS* system utilities to: communicate with terminals and printers; log errors; execute processes; and communicate with the switch.

Changes and Additions

CentreVu CMS R3V6 partially updates the ASCII interface. Dumb terminals and terminal emulation packages can be used to: display current ASCII text reports; use TimeTable; create and modify customer reports; and work with vectors. However, the existing ASCII/text reports are not updated to include any new data elements. Customers can add new data items to existing reports using the Custom Reports interface.

⇒ NOTE:

ASCII users cannot administer agents. They cannot add agents to splits, move agents to different splits, or change agent skill assignments. These functions must be performed through the *DEFINITY*[‡] administration terminal or through *CentreVu* Supervisor.

CentreVu CMS R3V6 gives customers a variety of new features. The following list highlights those new features.

- Support for 8,000 Vector Direct Numbers (VDN)
- Support of Best Service Routing (BSR)- *CentreVu* CMS R3V6 will store

^{*}*Solaris* is a trademark of Sun Microsystems, Inc. in the United States and other countries

[†]*UNIX* is a registered trademark licensed exclusively by X/Open Company, Ltd.

[‡]*DEFINITY* is a registered trademark of Lucent Technologies

new data items, however, existing ASCII reports will not be updated. No new ASCII reports will be created in support of this feature.

- *CentreVu* CMS R3V6 will store new data items; however, existing ASCII reports will not be updated. No new ASCII reports will be created in support of this feature.
- Administration of *CentreVu* CMS R3V6 Call Vectoring enhancements
- *CentreVu* Route Master - a Graphical User Interface (GUI) vector administration tool
- Universal Call ID (UCID) - included in the Call Record Data.

Reports

CentreVu CMS R3V6 offers reporting capabilities for effective management of the ACD environment. These reporting capabilities provide the information needed to manage the people, traffic load, and equipment in an ACD environment. These reports are classified as real-time or historical reports.

Real-time reports contain information about the status of splits or agents in the splits. Customers can use the reports to compare one split's or agent's performance to other splits and agents. The information provided by the reports also help compare abandoned calls to answered calls. The real-time information is updated on an administrable interval.

Historical reports summarize data into daily, weekly and monthly totals. Historical reporting uses information stored in raw data format from the past to provide management reports on virtually every aspect of the ACD. Historical reports give a basis for decisions concerning when to reorganize the ACD split structure, change staffing levels, reprogram incoming call vectors, reallocate incoming trunks, or redistribute call traffic loads.

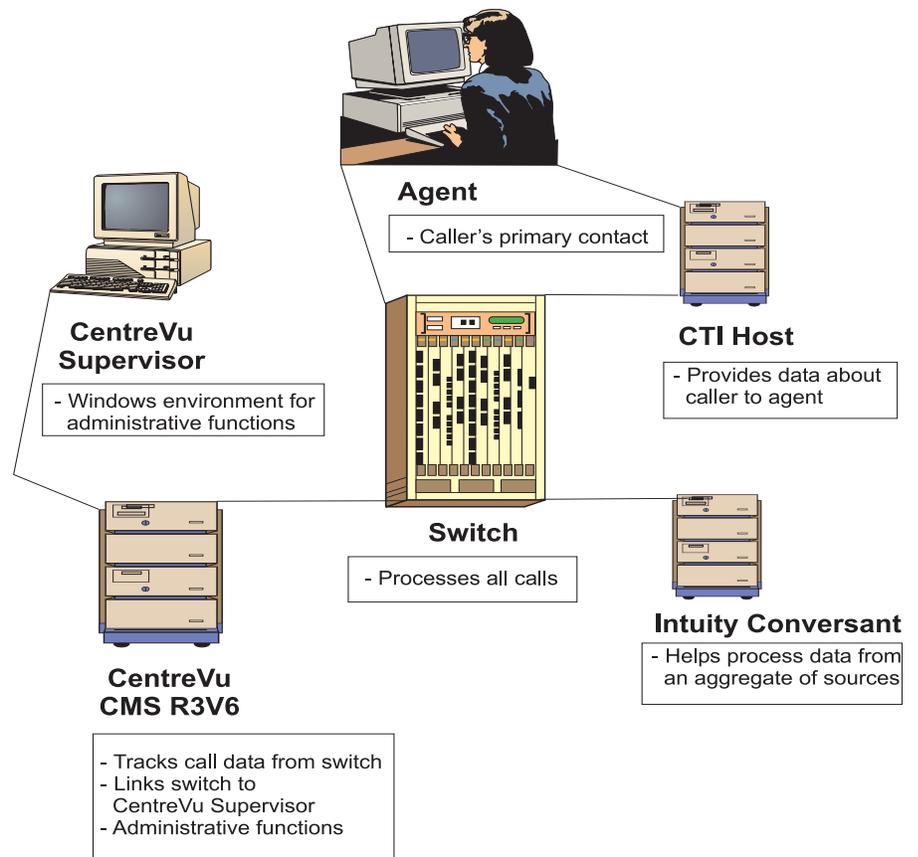
Customers and businesses can create real-time and historical reports by using the standard reports as a starting point; or they can create original reports. This flexibility enables reporting on aspects of the ACD activity unique to each business.

CentreVu CMS R3V6 provides a powerful custom reports capability for real-time and historical reports and has an extensive exceptions reporting capability. The reports provide call center managers with the information needed to direct an efficient operation. Real-time reports provide supervisors the data required to manage agents effectively and to maintain the highest level of service to customers.

The historical reports give call center managers summary information on their center's operations. They provide various levels of trunk, split, and agent summary information depending on the needs of management. For example, the Agent Summary report lists details about an individual agent's performance over all splits for a given period. The Agent Report by Split provides the same information on a per-split basis. The Agent Attendance report provides a summary of activities while staffed on a daily, weekly, or monthly basis. The Agent Login/Logout report indicates an agent's login and logout time for each day the agent worked during a specified interval. There is also a Group Attendance report that is similar to the Agent Attendance report.

Relationship to Call Center

CentreVu CMS R3V6 connects to the switch, to *CentreVu Supervisor*, and other parts of a call center. *CentreVu CMS R3V6* enables these different pieces to communicate with one another. The figure below shows how *CentreVu CMS R3V6* fits into a call center.



CentreVu CMS R3V6 Package Structure

The basic *CentreVu* CMS R3V6 package is structured to allow agent size-sensitive pricing based on the number of agents that can be simultaneously logged on to the switch. These packages work on the *SUN*^{*} *SPARCserver 5*[†] (SPARC 5) and *Enterprise 3000*[‡] (E3000) platforms. The package includes the computer hardware and software needed to support the *CentreVu* CMS R3V6 software application.

The table below provides the Price Element Codes (PECs) available for ordering new *CentreVu* CMS R3V6 systems using the SPARC 5. The Sales Manual provides a complete description of these PECs.

PEC	Maximum Agent Size	Processor
1208-L82	25	SPARC 5
1208-L85	50	SPARC 5
1208-L87	75	SPARC 5
1208-810	100	SPARC 5
1208-820	200	SPARC 5
1208-830	300	SPARC 5
1208-840	400	SPARC 5
1208-850	500	SPARC 5
1208-860	600-5200	SPARC 5

.The packages described below use the E3000.

- 1208-8HP - This package includes a single processor E3000 and the other hardware needed to support the maximum number of agents.
- 1208-8SP - This package includes the software needed to support the maximum number of agents on the E3000 system.
- 1208-8AP - This package includes the modifications needed to use the E3000 in the Asia Pacific market.

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‡Enterprise is a trademark of Sun Microsystems, Inc. in the United States and other countries

CentreVu CMS R3V6 Features

General Information

CentreVu[™] Call Management System (CMS) R3V6 offers a number of optional software features. These features are available for new sales and aftermarket purchases. Complete descriptions and prerequisites for these features are available in the sales manual.

CentreVu Supervisor

CentreVu Supervisor V6 provides a *Windows*^{*} based interface for *CentreVu* CMS R3V6 users. *CentreVu* Supervisor V6 operates in the *Microsoft*[†] windows environment and provides a set of graphical user interface-based formats. A minimum of two *CentreVu* Supervisor logins are provided in each *CentreVu* CMS R3V6 package.

The user can access most of the *CentreVu* CMS R3V6 administrative functions through *CentreVu* Supervisor V6. However, a few functions are available only from terminal emulation to *CentreVu* CMS R3V6. A terminal emulator is provided as part of the *CentreVu* Supervisor V6 package for administration of those few functions; such as Vector Administration and Forecasting.

CentreVu Supervisor V6 also provides the additional abilities of administering agents. With *CentreVu* CMS Supervisor V6, customers can add agents to splits, move agents to different splits, or change agent skill assignments.

NOTE:

Only the most recent version of *CentreVu* Supervisor, version six, is compatible with *CentreVu* CMS R3V6.

Benefits

The following list highlights some of the *CentreVu* Supervisor V6 features:

- Standard real-time and historical reports
- Integrated reports
- Rolling chart capability for some of the standard graphical reports
- Access to all standard *CentreVu* CMS R3V6 reports
- Report Designer

^{*}*Windows* is a registered trademark of Microsoft Corp.

[†]*Microsoft* is a registered trademark of Microsoft Corp.

- Thresholding and visual notification of real-time data
- Data export via *Windows* clipboard to other applications
- Customizable toolbar
- Expanded “drill-down” menus
- Support of Reason Codes
- Move agent/change skills via “drag and drop” mouse usage

Minimum and Recommended Configurations

The following table describes the minimum requirements needed to run *CentreVu* Supervisor V6 when it connects to *CentreVu* CMS R3V6 through a serial or LAN connection and describes the recommended configuration.

Part	Serial Minimum	LAN Minimum	Recommended
Processor	<i>Intel</i> [†] 486DX/66 or <i>Pentium</i> [†]	<i>Intel</i> 486DX/66 or <i>Pentium</i>	<i>Pentium</i> 133 MHz
RAM	16 MB (24 MB for <i>Windows NT</i> [‡])	12 MB (24 MB for <i>Windows NT</i>)	32 MB
Disk Space	20 MB	20 MB	50 MB
Operating System	<i>Windows 95</i> [§] or NT 4.0	<i>Windows 95</i> or NT 4.0	<i>Windows 95</i> or NT 4.0
Installation Medium	CD ROM or Server	CD ROM or Server	CD ROM or Server
Connection	16550A UARTS	Winsock 1.1 compliant network TCP/IP protocol stack	TCI/IP Protocol stack
Monitor	n/a	n/a	SVGA with a graphics adapter supporting 16-bit color and 800X600 resolution

*Intel is a trademark of Intel Corporation

†Pentium is a trademark of Intel Corporation

‡Windows NT is a trademark of Microsoft Corp.

§Windows 95 is a trademark of Microsoft Corp.

For more information, see the *CentreVu Supervisor Version 6 Reports* document (Lucent Technologies 585-215-851) for additional information.

Call Vectoring

Call Vectoring is a method of routing incoming calls and utilizing agent and system resources.

A call vector is a series of call processing steps (such as providing ringing tones, busy tones, delays, announcements, and routing to ACD split queues) that define how incoming calls are handled and routed based upon a set of conditions. The steps, called vector commands, determine the type of processing that specific calls will receive. Vectoring puts the choices for handling client calls under the customer's control, since the vectors can be written by its own staff.

Vectoring allows customers to customize the pathway a caller will take based upon the calling purpose and the system conditions prevailing at the time. It provides the optimum mix of service and resource utilization.

Vector commands can direct calls to on-premises or off-premises destinations, to any hunt group or split, or to a specific call treatment such as an announcement, music, ringing, silence, forced disconnect, forced busy, delay treatment, or call coverage path. Multiple vectors can be logically chained together.

Conditional checks can be made for oldest call waiting, number of agents staffed, agents available, or number of calls in the queue. Thus, calls can be queued to the split or splits that will offer the quickest speed of answer and best agent utilization. Multiple splits may be simultaneously checked based upon the conditions.

Call Vectoring is primarily used to handle the call activity of ACD splits. Call Vectoring can also manage a queue by keeping calls queued in different splits while also providing a series of other processing options. Other common applications include:

- Special treatment for selected callers - Calls from preferred credit card clients may receive priority treatment, but they do not have to be handled by a separate split. Agents in the same split can handle both preferred customers and all other customers. A call can be queued into different priority levels, and calls to different Vector Directory Numbers (VDNs) can go to different levels, with preferred customers having top priority.

This means when all agents are busy in this split, calls from preferred customers would go to the top of the queue, ahead of other callers already in the queue. Certain call types may generate or protect more revenue than others. They can be prioritized, thus maximizing the financial performance of the call center.

- Night Treatment - During nonbusiness hours, the call vector can route calls to a specified destination such as an announcement and then disconnect the call. During business hours, the vector can send calls to split queues for connection to agents.
- Off-loading of periodic excess calls - A vector can test a split for the number of calls already in queue. If the number is above a certain threshold, the vector will bypass that split and route the call to another destination such as another split, an attendant, a busy tone, an announcement with disconnect, or an AUDIX mail box. However, if the number is below the threshold, the vector will queue the call to that split.
- Information announcements for the calling party - The human intervention needed to distribute common messages can be minimized with information announcements. A group of people with a common interest can be instructed to call a specific number (VDN) that connects to a specific announcement vector, which might terminate in a voice messaging system.
- VDN of Origin Announcement (VOA) - This feature provides a short message when the agent answers a VDN call. The message informs the agent of the city of origin of the caller or the type of call: for example; sales or service, based on the VDN used to process the call. The agent can then respond appropriately to the caller. While the agent can hear both the message and the caller; the caller cannot hear the message.
- Disaster Recovery - In a case where no agents are logged in during a time of day when they normally would be, the vector can be preprogrammed to send the call to another site. This might occur if, for some reason, the initial call center was not operating. For example; poor weather conditions, commercial power outages, or some other act of nature could force a call center to close.

Vectors can also consider multiple conditions together before routing a call. For example, which announcement to play or the priority level of the queue. Conditions such as oldest call waiting, number of agents staffed, number of agents available, time of day, and day of the week, can be considered in combination to create very specialized treatment.

Graphics

This optional software program allows dumb terminals to graphically represent real-time or historical data for various agent, split, VDNs, or system activities such as ACD calls, calls abandoned, average speed of answer. The programs displays the data in bar graphs. The bar graphs can be customized and are most useful as a quick reference on ACD activity.

 **NOTE:**

CentreVu Supervisor does not need this package.

Forecasting

Forecasting is the method used to estimate, calculate, or predict the staffing and capacity needs for specified time periods. With Forecasting, users can predict the following:

- Number of calls you could receive during a specified time period
- Number of agents you will need to handle a specified volume of calls
- Number of required trunks
- Trunk performance.

For example, with forecasting, users can look at your call volume for the last four Mondays to predict next Monday's call volume. Then, using assigned objectives, users can show the number of agents and trunks that are required during each intrahour interval next Monday.

See the *CentreVu Call Management System Release 3 Version 5 Forecast* document (Lucent Technologies 585-215-825) for more information.

Multiple ACDs

CentreVu CMS R3V6 can support as many as eight ACDs. To support this increase, *CentreVu* CMS R3V6 can now support as many as 4,096 vectors, or 512 per switch. This increase lets large customers more easily centralize their call center administrative activities.

Expert Agent Selection (EAS)

EAS builds on the power of Call Vectoring and expands the capability of an ACD by allowing incoming calls to be routed to specialized groups of agents within a larger group of agents. EAS provides a method of matching the needs of the caller with the skills and talents of agents. A skill represents a level of competence, such as the ability to speak

Spanish, or knowledge about a particular product. Call Vectoring is used to route the call based on the identified need of the caller, the priority order skills of the agents, or the number the caller dialed. When the system is optioned with EAS, the agents can be monitored based on their logical agent ID rather than by the number of the physical terminal where they are located. Logical agent ID monitors ACD, personal, Direct Agent, and voice terminal calls sent to or placed by an agent.

The Add and Remove Skills feature allows agents using EAS to dynamically add or remove skills by dialing a feature access code (FAC) to meet the real-time needs of incoming call volumes by type. Information provided by the management system about the incoming calls alerts supervisor and agents to the need to change agent skills. When an agent adds or removes a skill, the system displays on the voice terminal the updated set of skills currently assigned to the agent.

The Logical Agent feature is used in conjunction with EAS. Using Logical Agent, an agent can log into any voice terminal on the system. The agent's skill assignments, coverage path, restrictions, and name are now associated with that terminal until the agent logs out. This makes it possible to route calls based on agent skills or login IDs regardless of the voice terminal where the agent is logged in. Logical Agent makes it possible for the agent to take a seat anywhere in the system on any given day. In a campus call center, this can mean that agents can be located at different buildings on different days. The profile of the agent can also be invoked from a remote site when using the optional Home Agent Feature.

Direct Agent Calling allows ACD calls to be directed or transferred to a particular agent and treated as an ACD call. This makes it possible for customers to call a specific agent to whom they have already spoken in a previous call. Direct Agents can handle more than one ACD call at a time by using the Multiple Call-Handling (MCH) feature. This allows Direct Agent Calling agents in an MCH split to put either an ACD or non-ACD call on hold and become immediately available to receive another ACD call in the Direct Agent calls queue. Since the call is treated as an ACD call, *CentreVu* CMS R3V6 will measure and report the call.

External/Internal Call History

The External Call History interface allows customers to transfer *CentreVu* CMS R3V6 call record files to another computer.

This feature is especially useful for call centers with a high volume of call traffic. It allows a much higher volume of call data to be processed and stored because the *CentreVu* CMS R3V6 computer can only process a limited amount of call data.

Customers will need to allocate space on *CentreVu* CMS R3V6 for call records to be buffered.

As calls are processed, call records are recorded in a file (one record per call segment) until the file size reaches 20 MB or the end of an interval is reached; whichever comes first. When this happens, the file of call record segments is transferred to another computer through uucp.

A new file (and its first record) is then created as the first segment of the next call is processed.

Internal call records support Busy Hour Call (BHC) rates up to 100 BHC and a total of 5,000 call records. For more information, see the *CentreVu Call Management System Release 3 Version 6 External Call History Interface* (Lucent Technologies 585-215-584) for additional information.

CentreVu Explorer

CentreVu Explorer uses External Call History data not available in the standard *CentreVu* CMS R3V6 application. *CentreVu* Explorer provides a graphical user interface enabling desktop queries, reports, and cradle-to-grave analysis of a call center's performance. *CentreVu* Explorer provides a powerful mechanism to store and retrieve valuable call center data over any period of time.

CentreVu Explorer provides insight into several areas, including:

- Call lifecycle
- Agent activities
- VDN and Split/Skill information
- Demographic information
- Special call treatments

CentreVu Explorer runs on a customer-provided NT Server and communicates to desktop clients through Intranet Browser software activities. It uses minimal desktop PC resources.

See the *CentreVu Explorer Installation and Getting Started* (Lucent Technologies 585-215-835) or *CentreVu Explorer User Guide* (Lucent Technologies 585-215-840) documents for more information.

Call Work Codes

Call Work Codes are customer-defined codes such as account numbers, call activity codes, credit card numbers or social security numbers. The call work code entered by an agent will be recorded by *CentreVu* CMS R3V6. These codes allow a call to be traced throughout the entire cycle.

Agent Trace

The Agent Trace feature must be running in order to obtain an Agent Trace report. A trace can be activated for as many as 25 agents at one time. You can select the dates in which the trace will receive information.

The Agent Trace report lists each agent activity and the time it occurred. The Agent Trace report can be helpful when evaluating how well individual agents are using their time.

See the *CentreVu Call Management System Release 3 Version 6 Administration* (Lucent Technologies 585-15-850) document for more information.

Report Designer

Report Designer is a part of *CentreVu Supervisor V6* that allows you to create customized reports. *Report Designer* allows you to create reports, edit standard CMS and Supervisor reports, and copy items from one report to another.

The customized reports are saved on the CMS server. Reports that were assigned global permissions can be accessed by other Supervisor users with appropriate permissions.

See the *CentreVu Report Designer Version 6 User Guide* (Lucent Technologies 585-215-859) document for more information.

Planning CMS R3V6 Call Centers

General Information

CentreVu[™] Call Management System (CMS) R3V6 is a sophisticated part of a call center. Ensuring that it works well for a customer requires careful planning. This chapter lists the various roles and responsibilities involved in planning the configuration of *CentreVu* CMS R3V6 and describes the components needed to run *CentreVu* CMS R3V6. These components include:

- Compatible Switches
- Supported Platforms
 - Supported Terminals
 - Supported Printers
 - Supported Modems
- Environmental Requirements
 - General Features
 - Power Requirements
 - Space Requirements
 - Physical Requirements
- Required Software
- Miscellaneous Components

Roles and Responsibilities

The more accurate the information the account executive enters into the configurator, the better the call center will meet the customer's needs. The following table describes the general steps involved in configuring *CentreVu* CMS R3V6.

Step	Responsible	Activity
1	Account Executive	Complete needs assessment with customer. Specifically, include information about the switch, number of agents, and how the customer wants to administer the call center.
2	Account Executive	Enter the information into the configurator.
3	Account Executive	Assign reference number.
4	Account Executive	Send the E1154 form to the Design Center.
5	Design Center	- Analyze the design, - Recommend improvements.
6	Account Executive	Review design and recommendations made by the Design Assurance Center.
7	Account Executive	Show revised design and recommendations to customer.
8	Account Executive	Change design as agreed to by customer.
9	Account Executive	Return the design to the Design Assurance Center as a firm order.
10	Design Center	Review and approve revised plan.
11	Design Center	Send data storage allocations to account executive.
12	Account Executive	Request Project Manager
13	Account Executive	Schedule implementation with the Provisioning team and the customer

Compatible Switches

CentreVu CMS R3V6 supports several older *DEFINITY*[®] switches. The switches that are compatible with *CentreVu* CMS R3V6 include:

- *DEFINITY* G2.2 Issue 3.0 or greater
- *DEFINITY* G3V1 (vs, s, i, r)
- *DEFINITY* G3V1.1 (vs, s, i, r)
- *DEFINITY* G3V2 (vs, s, i, r)
- *DEFINITY* G3V3 (vs, s, i, r)
- *DEFINITY* G3V4 (vs, si, r)
- *DEFINITY* ECS R5.0 (vs, si, r)
- *DEFINITY* ECS R6.0 (vs, si, r).

Other Lucent Technologies' products, such as the discontinued *DIMENSION*[®] switches, do not support *CentreVu* CMS R3V6.

Supported Platforms

The new *CentreVu* CMS R3V6 offers use only *Sun*^{*} platforms. The following table lists some basic configurations that support *CentreVu* CMS R3V6 and the maximum number of agents that the platform can support. At this time, only the *SPARCserver* 5[†] (SPARC 5) and the *SUN Enterprise* system 3000[‡] (E3000) are used.

Maximum Agent Size	Processor	RAM	Disk Storage
25	SPARC 5	32 MB	2 GB
50	SPARC 5	32 MB	2 GB
75	SPARC 5	32 MB	2 GB
100	SPARC 5	64 MB	2 GB
200	SPARC 5	64 MB	2 GB
300	SPARC 5	96 MB	2 GB
400	SPARC 5	96 MB	2 GB
500	SPARC 5	128 MB	2 GB
5,200 - 600	SPARC 5	128 MB	2 GB
5,200	or E3000	256 MB	4 GB

The above platforms do not provide optimum performance. To achieve optimum performance, customers will need to increase the capabilities of these platforms. Customers can purchase more RAM and disk storage for all the servers. However, only the E3000 can have a CPU added to it.

⇒ NOTE:

CentreVu CMS R3V6 will no longer run on *Intel*[§] systems, including the 6386-25, 33, *StarServer*[\] 6486-33 and *GIS3332* platforms.

**Sun* is a trademark of Sun Microsystems, Inc. in the United States and other countries.

†All *SPARC* trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. in the United States and other countries.

‡*Enterprise* is a registered trademark of Sun Microsystems, Inc. in the United States and other countries.

§*Intel* is a trademark of Intel, Inc.

\StarServer is a registered trademark of AT&T.

Supported Terminals

The table below lists the terminals that can be used with the supported platforms. Please note that some of these terminals have been discontinued.

Model	PEC	Description
260lf	69779 69780, PWR50 69780, PWR51 69780, PWR52 69780, PWR56 69781	color monitor international color control unit and power cord international color control unit and power cord international color control unit and power cord U.S. color controller and power cord 101 - keyboard
605 MT		discontinued
615 CMT		discontinued
620 MTG		discontinued
705 MT		discontinued
715 BCT		discontinued
2900/AWTC		discontinued
4000/AWTC		discontinued
4425		discontinued

Supported Printers

This section lists the printers that can be used with the supported platforms. Please note that some of these printers have been discontinued.

Model	PEC	Description
<i>Okidata</i> OP16n	12137	120V LED page printer with serial interface converter
<i>Okidata</i> ML 321 Turbo	69646	narrow/wide serial/parallel dot matrix printer
<i>Okidata</i> ^a OL810e		discontinued
444 Line Printer		discontinued
475		discontinued
476		discontinued
495		discontinued
570		discontinued
583		discontinued
593/595		discontinued
<i>Okidata</i> OL830+		discontinued
<i>AT&T</i> 572		discontinued
<i>AT&T</i> 573		discontinued
GIS 6417		discontinued
<i>Okidata</i> ML321		discontinued

^a*Okidata* is a registered trademark of Oki Electronic Industry Co., Ltd.

Supported Modems

The following table lists the modems that can be used with the supported platforms. The *U.S. Robotics*^{*} *Sportster*[†] 33.6 is the modem that is automatically supplied. The *Paradyne Comsphere*[‡] 3910 modems are for international orders. Please note that some of the supported modems have been discontinued.

Model	PEC	Description
<i>U.S. Robotics Sportster</i> 33.6	2569-839	Hayes compatible (default)
<i>Comsphere</i> 3830	63194	Hayes compatible
<i>Comsphere</i> 3910	2177-ASL 2177-AUS 2177-BEL 2177-CYP 2177-DEN 2177-FIN 2177-GER 2177-NTH 2177-NZL 2177-POR 2177-SAF 2177-SPN 2177-SWD 2177-SWZ 2177-UKG 2177-NOR 2177-TKY 2177-IRE 2177-EUR 2177-IND 2177-JPN 2177-MLY 2177-RUS 2177-SNG	Australia, cc 407696301 Austria, cc 407696343 Belgium, cc 407696350 Cyprus, cc 407696368 Denmark, cc 407696376 Finland, cc 407696590 Germany, cc 407696608 Netherlands, cc 407696616 New Zealand, cc 407696624 Portugal, cc 407696632 So. Africa, cc 407696640 Spain, cc 407696657 Sweden, cc 407696665 Switzerland, cc 407696673 United Kingdom, cc 407696681 Norway, cc 407691039 Turkey, cc 407691104 Ireland, cc 407691112 Hungary/Romania, cc 407696707 India, cc 407696715 Japan, cc 407696723 Malaysia, cc 407696731 Russia/CIS, cc 407696749 Singapore, cc 407696756
AT&T 2400		discontinued

**U.S. Robotics* is a registered trademark of U.S. Robotics, Inc.

†*Sportster* 33.6 is a registered trademark of U.S. Robotics, Inc.

‡*Comsphere* is a registered trademark of Paradyne Corp.

Supported Platforms

Model	PEC	Description
<i>AT&T Paradyne DataPort^a</i>		discontinued
<i>AT&T Paradyne DataPort Express</i>		discontinued
<i>U.S. Robotics Sportster 14.4</i>		discontinued

^a*Paradyne DataPort* is a registered trademark of Paradyne Corp.

Environmental Requirements

Environmental requirements include the following types of information:

- General Features
- Power Requirements
- Space Requirements
- Physical Requirements.

General Features

The following table describes the general features of the *SPARC* 5, 10, 20 and E3000 platforms. Please note that *SPARC* 10 and 20 have been discontinued. These platforms can only be upgraded.

General Features	Platform			
	SPARC 5 (quantity)	SPARC 10 (quantity)	SPARC 20 (quantity)	E 3000 (quantity)
Processors (equipped with 1 MB Cache memory each)	(1) 170 MHz	(1 or 2) 50 MHz	(1 or 2) 150 MHz	(1 or 2) 250 MHz
Maximum Expandable Memory	256 MB	448 MB	448 MB	1,024 MB
Maximum Expandable Disk Space	(12) 2 GB	(12) 2 GB	(12) 2GB	(10) 4.2 GB
S-Bus Expansion Slots	3	4	4	3 or 6
QIC-SCSI Tape Drive	(1) 4/8 GB	(1) 150 MB	none	none
8 mm Tape Backup Unit	optional 14 GB	(1) 5 GB	(1) 14 GB	(1) 14 GB -internal
CD ROM Drive	(1) internal	(1) external	(1) internal	(1) internal
Ethernet TCP/IP networking	yes	yes	yes	yes

Power Requirements

This section includes power requirements for the supported platforms and associated equipment. These products are designed to work with single phase power systems having a grounded neutral conductor. In planning where to place the equipment, take into account that each of the following items requires access to a power outlet (per a separate power cord):

- Processors
- Network Terminal Servers
- System Console
- Desktop Disk, Tape drive and CD ROM units
- Network HUB and RS232 to RS 449/422 Interface (protocol) Converter units.

The table below describes the power requirements of the hardware.

Hardware Component	Power Requirements			
	Voltage	Frequency	Maximum Current	
			120 V	240 V
<i>SPARC 5</i>	100-240 VAC	50-60 Hz	4.60 A	2.30 A
<i>Enterprise 3000</i> includes tape, CD-ROM, disk drives	100-240 VAC	47-36 Hz	12.00 A	6.00 A
17" Color Monitor (X268A) with Keyboard (X3500)	110/220 VAC 220-240 VAC	50/60 Hz 50-60 Hz	2.70 A	1.50 A
QIC-150 Tape Drive (X660A)	100-120 VAC 200-240 VAC	47-63 Hz 47-63 Hz	0.80 A	0.40 A
UniPack QIC 2.5 GB Tape Drive (X6102A)	100-240 VAC	47-63 Hz	0.60 A	0.30 A
UniPack SLR 4-8 GB Tape Drive (X6109A)	100-240 VAC	47-63 Hz	0.60 A	0.30 A
14 GB 8 mm Tape Drive (X844A)	100-120 VAC 200-240 VAC	47-63 Hz 47-63 Hz	0.80 A	0.40 A
UniPack 14 GB 8 mm Tape Drive (X6109A)	100-240 VAC	47-63 Hz	0.60 A	0.30 A
2.1 GB desktop disk pack (X567A)	100-120 VAC 200-240 VAC	47-63 Hz 47-63 Hz	0.80 A	0.40 A

Hardware Component	Power Requirements			
	Voltage	Frequency	Maximum Current	
			120 V	240 V
UniPack 2.1 GB Disk Drive (X512A)	100-240 VAC	47-63 Hz	0.60 A	0.30 A
Black Box RS232-RS422 Converter (IC456A-R3) Black Box RS232-RS422 Converter (IC456AE-R3)	115 VAC Supply 230 VAC Supply	50/60 Hz	0.10 A	0.05 A
SBus Expansion Subsystem (X1072A)	100-240 VAC	47-63 Hz	2.00 A	1.00 A
IBM 8222 Network Hub	100-240 VAC	50/60 Hz	0.25 A	0.15 A
CentreCOM AT-MR820TR Hub	100-120 VAC 200-240 VAC	50/60 Hz 50/60 Hz	0.5 A	0.25 A
Network Fiber Hub	85-250 VAC	47-63 Hz	0.5 A	0.25 A
Xylogics 8-port MicroAnnex XL	110/220 VAC	60/50 Hz	1.0 A	0.5 A
Xylogics 8+2-port MicroAnnex XL	110/220 VAC	60/50 Hz	1.0 A	0.5 A
Xylogics 16-port MicroAnnex XL	110/220 VAC	60/50 Hz	1.5 A	0.75 A
AT&T Paradyne Comsphere 3830 Modem	115 VAC +/- 10%	60 Hz	0.5 A	N/A
AT&T Paradyne DataPort Express 3715 Modem	120 VAC +/- 10%	60 Hz	0.7 A	N/A
AT&T Comsphere 3910 Modem	100-250 VAC	50-60 Hz	0.1 A	0.05 A
U.S. Robotics Sportster 14.4 Modem	120 VAC	60 Hz	0.175 A	N/A
U.S. Robotics Sportster 33.6 Modem	120 VAC	60 Hz	1.0 A	N/A

Space Requirements

This section includes the dimensions and weight requirements for the hardware components.

When you place the system on a desktop, allow at least 75 mm (6 inches) of unobstructed space at the rear and both sides of the system. Do not allow any piece of equipment to emit warm exhaust air into the air intake vents of the system. Ensure that the desk is sturdy and free of movement.

You can safely place monitors with bases the same size or smaller than the system on top of the system. Monitors with larger bases may be unstable.

CAUTION:

Do not place monitors with larger bases than the system unit on top of the unit. Do not block any fan or vents on the sides or rear of the system unit.

The table below lists the space requirements for the systems.

Hardware	Dimensions			
	Height	Width	Depth	Net Weight
SPARC 5	3.1 in. (7.7 cm)	16.4 in. (41.7 cm)	16.1 in. (40.9 cm)	20.0 lbs. (9.1 kg)
SPARC 20	3.1 in. (7.7 cm)	16.4 in. (41.7 cm)	16.1 in. (40.9 cm)	20.0 lbs. (9.1 kg)
E3000	25.5 in. (64.5 cm)	17.0 in. (43.2 cm)	23.5 in. (59.7 cm)	160 lbs. (72.7 kg)
64 Port Network Terminal Server (X2064A)	3.5 in. (8.9 cm)	17.5 in. (44.5 cm)	15.5 in. (39.4 mm)	16.0 lbs. (7.3 kg)
8 and 16 Port Network Terminal Servers	2.5 in.	13.0 in.	9.25 in.	10-14 lbs.
UniPack 2.1 GB External Tape Drive	2.6 in. (6.8 cm)	7.5 in. (19.3 cm)	12.2 in. (30.9 cm)	15.2 lbs. (7.9 kg)

Hardware	Dimensions			
	Height	Width	Depth	Net Weight
UniPack 4/8 GB External Tape Drive	2.6 in. (6.8 cm)	7.5 in. (19.3 cm)	12.2 in. (30.9 cm)	15.2 lbs. (7.9 kg)
UniPack 14 GB External Tape Drive	2.6 in. (6.8 cm)	7.5 in. (19.3 cm)	12.2 in. (30.9 cm)	15.2 lbs. (7.9 kg)
System Console	16.4 in.	16.0 in.	17.7 in.	49.5 lbs.
System Keyboard	2.75 in.	20 in.	7.0 in.	2.0 lbs.
Network Terminal Server Patch Panel	3.0 in.	14.0 in.	5.0 in.	2.0 lbs.
HSI x.25 Patch Panel	5.0 in.	13.0 in.	1.0 in.	2.0 lbs.
Network HUB Module	2.4 in. (5.9 cm)	10.4 in. (26.3 mm)	5.6 in. (14.1 cm)	2.1 lbs. (0.94 kg)
Network Fiber Hub Unit	16.5 in.	3.0 in.	7.0 in.	5.0 lbs.
RS232 to RS449/422 Interface (protocol) converter	2.3 in.	8.0 in.	11.9 in.	2.0 lbs.

Physical Requirements

The following table includes the physical (or environmental) requirements for the system. The values are the same for all the platforms. Observe these requirements when selecting a suitable site.

Physical Environment	Range
Processor Operating Temperatures	41 degrees to 104 degrees F (5 degrees to 40 degrees C)
Processor Non-operating Temperature	-4 degrees to 140 degrees F (-20 degrees to 60 degrees C)
Processor Operating Relative Humidity	20 percent to 80 percent (noncondensing)

Physical Environment	Range
Processor Non-Operating Relative Humidity	5 percent to 93 percent (noncondensing)
Processor Acoustic Limit	5.1 bels at 28 degrees C
Network Hub Module Operating Dry Bulb Temperature	50 degrees to 104 degrees F (10 degrees to 40 degrees C)
Network Hub Module Operating Maximum Wet Bulb Temperature	81 degrees F (27 degrees C)
Network Hub Module Operating Relative Humidity	8 percent to 80 percent
Network Hub Module Storage Dry Bulb Temperature	33.8 degrees to 140 degrees F (1 degrees to 60 degrees C)
Network Hub Module Storage Relative Humidity	8 percent to 80 percent
Network Hub Module Storage Maximum Wet Bulb Temperature	84.2 degrees F (29 degrees C)
RS232 to RS449/422 Interface (protocol) Converter Operating Temperature	32 degrees to 122 degrees F (0 degrees to 50 degrees C)
RS232 to RS449/422 Interface (protocol) Converter Storage Temperature	-4 degrees to 158 degrees F (-20 degrees to 70 degrees C)

Required Software

CentreVu CMS R3V6 needs the following software applications in order to run properly:

- *Sun Solaris*^{*} 2.5.1 operating system (Hardware: 11/97 version)
- Common Desktop Environment (CDE) 1.0.2
- *Sun* Validation Test Suite (VTS) 2.1.1
- *SunLink*[†] HSI/S Version 2.0 software (for systems having multiple ACD splits)
- *Solstice*[‡] for Server Connect X.25 Network Interface Version 9.1
- *INFORMIX*[§]
 - Structured Query Language (SQL) Version 7.20 (optional)
 - Standard Engine (SE) Version 7.22 (required)
 - International Language Supplement (ILS) Version 9.13 (required)
- *Solstice DiskSuite*[\] 4.1
- *Sun Solaris* patches
- CMS patches
- CMS Supplemental Services software

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

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

‡*Solstice* is a trademark of Sun Microsystems, Inc.

§*INFORMIX* is a registered trademark of Informix Software, Inc.

Solstice DiskSuite is a trademark of Sun Microsystems, Inc.

Miscellaneous Components

Some customers need their *CentreVu* CMS R3V6 offer modified to best meet their needs. Lucent Technologies offers a variety of components. The following table lists the miscellaneous components.

PEC	Description
12080	X.25 Link Kit
12081	1 GB External HDU FAST SCSI-2
12083	Network Terminal Server
12084	Network Fiber Hub Unit
12085	64 MB SIMM Memory Upgrade Kit
12086	25 ft. NTS Cable
12087	50 ft. NTS Cable
12088	Single to Dual Processor Upgrade Kit
12089	10-BaseT Hub Unit
12090	FAST SCSI-2 Controller
12091	5 GB/14 GB Blank Tapes, Cleaning Unit
12092	10-base FL Tansceiver
12093	Monitor/Keyboard Extension Unit
12094	2 GB External HDU FAST SCSI-2
12095	Token Ring Interface Card
12096	14 GB 8 MM External Tape Drive
12098	8 Port Serial NTS
12099	8 Port Serial / 2 Port Parallel NTS
12100	16 Port Serial NTS
12101	S-Bus Expansion Cabinet
12102	High Speed Serial Interface
12104	1 GB Internal Disk Drive
12105	Parallel Printer Cable (<i>Centronics</i> ^a)
12106	Parallel Printer Cable (<i>IBM</i> ^b)
12107	32 MB Memory Expansion Kit

PEC	Description
12108	<i>Solaris</i> 2.4 Documentation
12116	<i>Aurora</i> ^c 8 Serial Ports Card
12118	<i>Aurora</i> 16 Serial Ports Cad
12119	<i>Sun</i> 2.5 GB Tape Drive
12120	<i>Sun</i> 2.1 GB Internal Hard Disk
12124	<i>SPARC</i> 10 SGL 150 MHz Upgrade kit
12125	<i>SPARC</i> 20 DUAL 150 MHz Upgrade kit
12126	<i>SPARC</i> 10 DUAL 150 MHz Upgrade kit
12127	<i>SPARC</i> 20 SGL 150 MHz Upgrade Kit
12128	2.5 GB Blank Tape Cartridge
12131	<i>SPARC</i> 5 170 MHz Upgrade kit
12135	NTS Software
12136	<i>Solaris</i> Server License
12142	SLR5-4 GB Data Cartridge
12143	Tandberg Dry Process Cleaning Cartridge
12150	E3000 Single to Dual Upgrade
12151	E3000 additional 256 Memory
12152	E3000 S Bus I/O Board
12153	E3000 4.2 GB Disk Add
12154	E3000 Cooling Module
69770	Null Modem Adapter
69771	Network Serial Modem Adapter
69772	<i>INFORMIX</i> Development SQL, single processor
69773	<i>INFORMIX</i> Development SQL, dual processor
1208-CSU	On-Line Disk Suite

a*Centronics* is a trademark of Allied Telesyn International

b*IBM* is a registered trademark of International Business Machines Corp.

c*Aurora* is a trademark of Aurora Technologies, Inc.

Upgrade Packages

General Information

Customers who own previous versions of the Call Management System (CMS) can upgrade to R3V6. Generally, the older the previous version, the more the customer will need in order to upgrade.

The table below describes what customers need to upgrade to *CentreVu*[™] CMS R3V6 from previous versions. The *Sun*^{*} platforms use the *SPARCserver 5*[†] (SPARC 5) and the *Enterprise 3000*[‡] (E3000) platforms.

CMS Version	<i>Sun</i> Platform Required Changes	<i>Sun</i> Platform Optional Changes	Other Platform Required Changes	Other Platform Optional Changes
R2	Hardware Software Migrate Data	n/a	Hardware Software Migrate Data	n/a
R3V1	Software Migrate Data	Hardware	Hardware Software Migrate Data	n/a
R3V2	Software	Hardware Migrate Data	Hardware Software Migrate Data	n/a
R3V4	Software	Hardware Migrate Data	Hardware Software Migrate Data	n/a
R3V5	Software	Hardware Migrate Data	Hardware Software Migrate Data	n/a

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†All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. in the United States and other countries.

‡*Enterprise* is a trademark of Sun Microsystems, Inc. in the United States and other countries.

Roles and Responsibilities

The roles and responsibilities involved in upgrading a call center are similar to those involved in planning a new call center. The following table describes the general steps involved in configuring a call center.

Step	Role	Activity
1	Account Executive	Complete needs assessment with customer. Specifically, include information about the switch, number of agents, and how the customer wants to administer the call center.
2	Account Executive	Enter the information into the configurator.
3	Account Executive	Assign reference number.
4	Account Executive	Send the E1154 form to the Design Center.
5	Design Center	- Analyze the design, - Recommend improvements.
6	Account Executive	Review design and recommendations made by the Design Assurance Center.
7	Account Executive	Show revised design and recommendations to customer.
8	Account Executive	Change design as agreed to by customer.
9	Account Executive	Return the design to the Design Assurance Center as a firm order.
10	Design Center	Review and approve revised plan.
11	Design Center	Send data storage allocations to account executive only if the parameters have changed.
12	Account Executive	Request Project Manager.
13	Account Executive	Schedule implementation with the Provisioning team and the customer.

Upgrading from R2 CMS

Upgrading from R2 CMS to *CentreVu* CMS R3V6 requires the customer to purchase the software and one of the new processors. If the customer's terminals and printers are compatible with *CentreVu* CMS R3V6, those pieces do not need to be replaced.

The Upgrade Packages

Each upgrade package includes the computer processor hardware, the system software, and the *CentreVu* CMS R3V6 software application Right-To-Use (RTU). The configurator assumes that the customer reuses the terminals and printers. Package size is based on the number of agents that will be logged on simultaneously.

The following table provides the Price Explosion Codes (PECs) available for ordering an upgrade from R2 CMS to *CentreVu* CMS R3V6. Complete descriptions of and prerequisites for these PECs are provided in the sales manual.

PEC	Agent Size	Processor	RAM	Disk Storage
1208-8SU	100	SPARC 5	64 MB	2.1 GB
1208-8MU	300	SPARC 5	96 MB	2.1 GB
1208-8LU	600	SPARC 5	128 MB	2.1 GB
1208-8HP	maximum	E3000	256 MB	4.2 GB

Upgrading Features

If a customer's R2 CMS-Large supports more than one Automatic Call Distribution (ACD), added RTUs for multiple ACDs will not apply to the *CentreVu* CMS R3V6 upgrade. The customer will receive upgrades to support their current multiple ACD connectivity size. For example, if a customer with three ACDs active on their R2 CMS-Large upgrades to *CentreVu* CMS R3V6 and activates only three ACDs, they will pay only the upgrade charge. No added RTU charge will be made for ACDs two and three. However, if the customer adds a fourth ACD to *CentreVu* CMS R3V6, the RTU charge will apply to the fourth ACD.

Forecasting is automatically included with each R2 CMS to *CentreVu* CMS R3V6 upgrade. Customers who purchased Call Vectoring or Graphics software for R2 CMS receive these features with *CentreVu* CMS R3V6 at no additional cost.

Data Migration

Some customers upgrading from R2 CMS to *CentreVu* CMS R3V6 in an Expert Agent Selection (EAS) or Multi-ACD call center environment may need the use of R2 CMS during the transition. These customers may keep the R2 CMS application in service for a period of 30 days. The Technical Service Center (TSC) must be notified of this temporary service prior to the installation of *CentreVu* CMS R3V6.

NOTE:

Only one CMS can be connected to a given Private Branch Exchange (PBX) at a time. R2 CMS may not be connected to the *DEFINITY* Enterprise Communications System (ECS) Release 6 during the transition period.

Transferring historical data into *CentreVu* CMS R3V6 from R2 CMS requires the use of data conversion routines and data backups on R2 CMS. A data restore must also be performed on the *CentreVu* CMS R3V6. The same data conversion routines will migrate customer reports from R2 CMS to *CentreVu* CMS R3V6. Customers can perform these routines with support from the TSC provisioning group. If the customer requests Lucent Technologies' personnel to perform this function, an appropriate Professional Services offer will apply.

Some R2 CMS report functions do not automatically convert into *CentreVu* CMS R3V6. These functions can be manually converted or recreated in *CentreVu* CMS R3V6. The customer or Lucent Technologies' Professional Services can perform these functions. If Professional Services performs this work, the customer will be billed the regular rate. As with previous CMS releases, data conversion utilities are not available for migrations from the AP-16 CMS.

C language, shell, or other custom software reports originated in R2 CMS cannot transfer into *CentreVu* CMS R3V6. Programs created in UNIX* will have to be recreated in SOLARIS†. If Professional Services performs this conversion work, the customer will be liable.

*UNIX is a registered trademark of Novell, Inc.

†Solaris is a trademark of Sun Microsystems, Inc. in the United States and other countries.

Upgrading Hardware

Hardware upgrades automatically come with the software necessary to run *CentreVu* CMS R3V6. With the upgrade, customers receive any features they previously purchased. However, customers must pay for any new features they may want to add while upgrading. With this release, the biggest influence on hardware upgrades is the fact that *Intel*^{*} platforms are no longer supported.

Upgrading from an *Intel* Platform

CentreVu CMS R3V6 will not run on the *Intel* platform. Customers can upgrade to either the *SPARC* 5 or E3000 platforms.

All the *Intel* to *Sun* upgrade packages include the necessary hardware components to support a hardware upgrade from an existing R3 CMS *Intel* processor configuration. The customer must have CMS R3V1 or higher supported by a 6386/25s, 6386/33s, *StarServer*[†], or GIS 3332 processor. If the software is not at this or a later release, it can be upgraded to the current *CentreVu* CMS R3V1 load.

When upgrading from an *Intel* platform, the E3000 processors require a loaner 2.5 GB tape drive to migrate the customer's data. The loaner tape drive connects to the customer's E3000 processor and allows it to read the *Intel* tapes. Lucent Technologies supplies a tape drive when the upgrade is scheduled. After the upgrade, the Project Manager is responsible for returning the loaner tape drive.

All *CentreVu* CMS R3V6 software RTU licenses must be transferred from the existing configuration to the new configuration. Hardware upgrades that involve going from one *CentreVu* CMS R3 to a more recent release must be configured and ordered through the CMS configurator to ensure that the software, hardware, and connectivity is sized correctly for the customer's application.

The following table provides the PECs available for ordering a hardware upgrade. More information is provided in the sales manual.

PEC	Processor	RAM	Disk Storage
1208-8UH	SPARC 5	64 MB	2.0 GB
1208-8IS	E3000	256 MB	4.2 GB

*Intel is a trademark of Intel Corporation

†Starserver is a trademark of AT&T

Upgrading *Sun* Processors

Customers with *SPARC* 10 or 20 platforms can improve the overall system performance by upgrading to the 150 MHz processor. Currently, four PECs cover this type of upgrade. These PECs deal with both single and dual processor upgrades. Contact *CentreVu* CMS provisioning to schedule support for this upgrade. *Sun* technicians complete the hardware installation. The processor modules being replaced will be returned to *Sun* by the *Sun* technician.

In addition, customers currently using the *SPARC* 5 and 10 platform can upgrade to the *SPARC* 20 single or dual processor platforms. These orders will be supported on a case by case basis because of the complexity of this change and the various options for completing the platform change process. Account teams should contact the Call Center Core team through the design center if they want to upgrade a customer using these PECs.

Software Upgrades

Software upgrades from *CentreVu* CMS R3V1 or 2 to R3V6 are available in two sizes, depending on whether the customer has Call Vectoring. Generally, upgrading from an older version of *CentreVu* CMS R3 to *CentreVu* CMS R3V6 requires only the software. However, increased customer needs may require them to add hardware to their platform. The customer may simply need more memory or may need other additional hardware in order to support some application requirements.

PBX Compatibility Issues

The account team must make sure that the PBX and the PBX options are compatible with *CentreVu* CMS R3V6. If the PBX and *CentreVu* CMS R3V6 are not correctly configured, several complications will occur. These complications could range from a customer not being able to use some of the new features to the PBX-CMS link not connecting.

NOTE:

The account team must provide the provisioner the correct version and feature information. A system based on the wrong version number must be completely re-provisioned. The reprovisioning service will be billed to the branch.

CMS R3V1

Customers who have *CentreVu* CMS R3V1 with 1,023 agent RTU will be provided the 600 agent RTU when they upgrade. Customers upgrading other than 1,023 agent RTU from *CentreVu* CMS R3V1 will be migrated to the closest larger increment of agent size RTU.

Software Upgrade Packages

The following table lists the PECs available for ordering a software upgrade to *CentreVu* CMS R3V6. Complete descriptions of the prerequisites for these PECs are provided in the sales manual.

PEC	Comments
1208-46U	R3V1/V2/V4 to V6 software upgrade, without vectoring.
1208-46V	R3V1/V2/V4 to V6 software upgrade, with vectoring.
1208-56U	R3V5 to V6 software upgrade without, vectoring.
1208-56V	R3V5 to V6 software upgrade with, vectoring.

U.S. Configuration of CentreVu CMS R3V6 Call Centers

General Information

The *AT&T*^{*} Order Management System (ATTOMS) configurator is used to design *CentreVu* Call Management Systems (CMS). This configurator consists of a number of screens called worksheets. Entering accurate information into these worksheets is a key part of successfully designing the *CentreVu* CMS R3V6 piece of a call center. This chapter describes:

- Accessing the configurator
- Selecting the correct worksheets
- Worksheets required for new designs
- Worksheets required for hardware upgrade designs
- Worksheets required for software upgrade designs
- Optional worksheets.

*AT&T is a registered trademark of AT&T

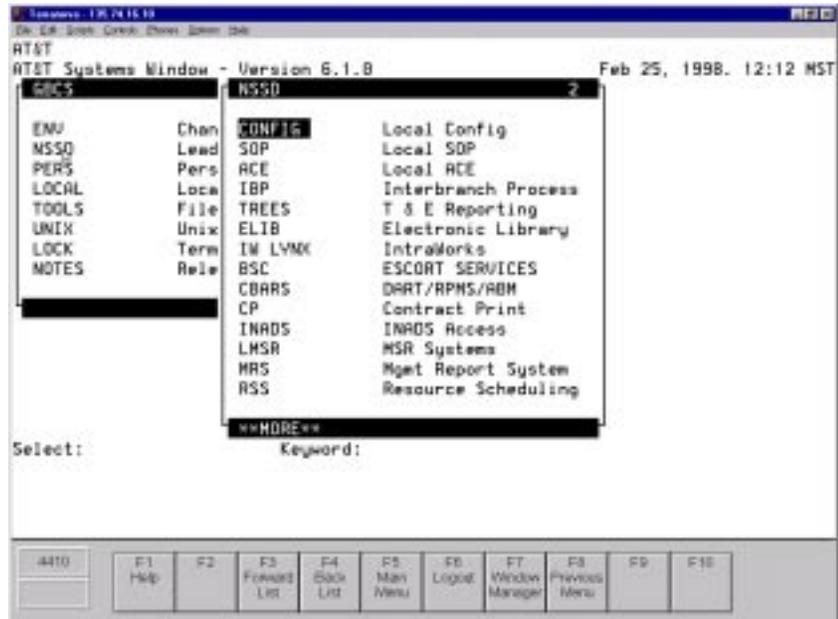
Accessing the Configurator

Follow the steps in this section to access the configurator through a PC using an emulator.

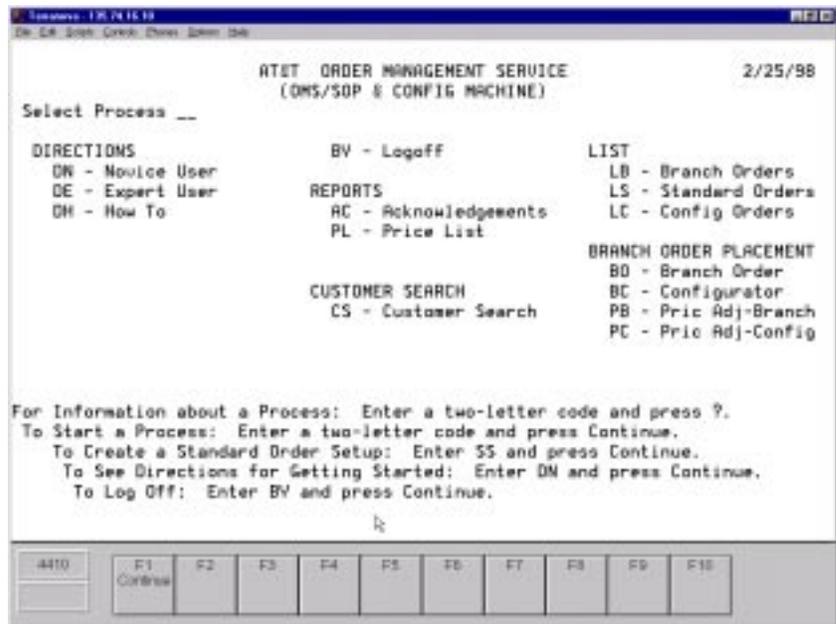
1. Access the appropriate server through the emulator. The system displays the Main Menu.



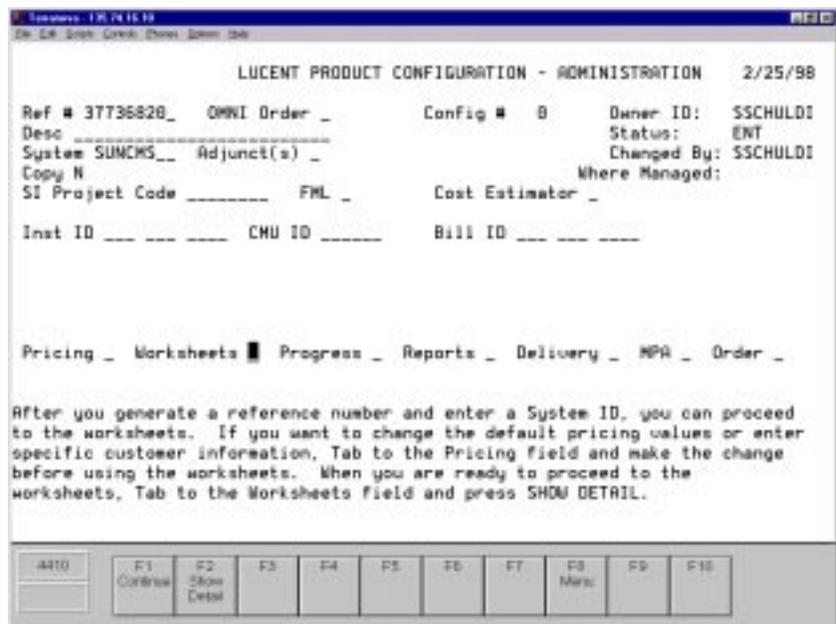
2. Select the NSSD Lead Menu. The system displays the Lead Menu.



3. Select the local configurator. The system displays the AT&T ORDER MANAGEMENT SERVICE screen.



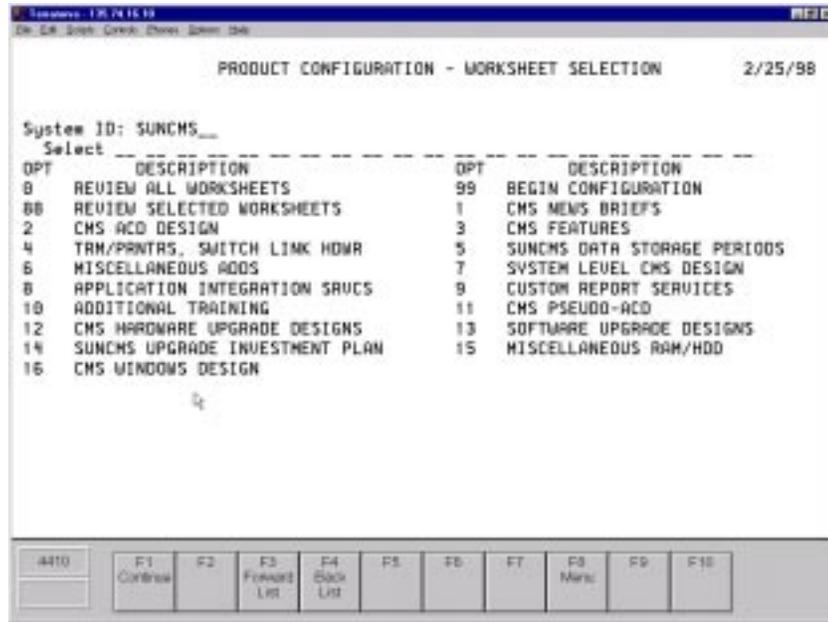
4. Select the BC option. The System displays the LUCENT PRODUCT CONFIGURATION - ADMINISTRATION screen.



5. Receive a reference number by tabbing through the Ref # field. After getting a reference number, tab to the System field and type SUNCMS in that field.

If you want to change the default pricing values or add customer information, tab to the pricing field and change that information before proceeding to the Worksheets field.

Tab to the Worksheets field. Press the <F2> key while in that field. The system will display the PRODUCT CONFIGURATION - WORKSHEET SELECTION screen.



The next sections describe the worksheets and which worksheets to select.

Selecting Worksheets

The previous section described how to access the SUNCMS configurator and reach the PRODUCT CONFIGURATION - WORKSHEET SELECTION screen. That screen displays the worksheet titles and numbers. The lists below describe when to select which worksheets.

To generate a new design, select the following worksheets:

2-CMS ACD DESIGN

3-CMS FEATURES

4-TRM/PRNTRS, SWITCH LINK HDWR

(this is an optional worksheet that is frequently used)

7-SYSTEM LEVEL CMS DESIGN

8-APPLICATION INTEGRATION SRVCS

16-CMS WINDOWS DESIGN

To upgrade the hardware used by an existing CMS, select the following worksheets:

2-CMS ACD DESIGN

3-CMS FEATURES

4-TRM/PRNTRS, SWITCH LINK HDWR

(this is an optional worksheet that is frequently used)

7-SYSTEM LEVEL CMS DESIGN

8-APPLICATION INTEGRATION SRVCS

12-CMS HARDWARE UPGRADE DESIGNS

16-CMS WINDOWS DESIGN

Use the following worksheet to upgrade the software features of an existing CMS or to migrate to *CentreVu* CMS R3V6.

13-SOFTWARE UPGRADE DESIGNS

Required Worksheets

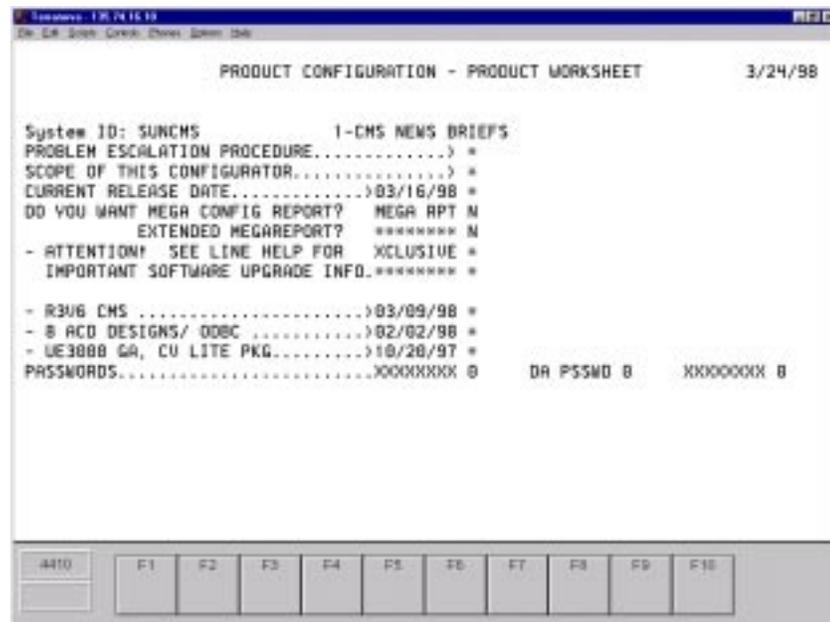
This section describes the screens needed to configure a *CentreVu* CMS R3V6 design.

The News Brief Worksheet

CMS NEWS BRIEFS. This worksheet gives the current release date and a brief summary of how the configurator changed since the last release. If you press the <F6> key, you can see general information about the configurator and the worksheets.

⇒ NOTE:

Some designs need passwords. If you do not have a password, the configurator will display a message that states you need a password instead of processing your design. Once the Sales Design Support Center (SDSC) gives you a password, enter it in this screen.



New Designs

New designs use several worksheets. You need to provide information about how many agents the customer's call center supports; which features and peripherals the customer wants; which miscellaneous components the customer needs to properly modify the call center; and any professional services the customer requests.

Worksheets 2-CMS ACD DESIGN; 7-SYSTEM LEVEL CMS DESIGN and 16-CMS WINDOWS DESIGN are used to design the core pieces of the system. Information from these worksheets help determine which package the customer should use and determine how much disk space and memory the system will need. Other worksheets are used to design different aspects of the system:

- Worksheet 3-CMS FEATURES is used to order software features.
- Worksheet 4-TRM/PRNTRS, SWITCH LINK HDWR is a frequently used optional worksheet used to order peripherals such as printers, terminals and modems.
- Worksheets 8-APPLICATION INTEGRATION SVCS and 9-CUSTOM REPORT SERVICES are used to order the different options provided by Professional Services.

Screen 2

CMS ACD DESIGN. The configurator uses information from this worksheet to calculate how many agents and Voice Response Units (VRU)s will simultaneously log into the system. This information is crucial to determining which package the customer needs along with the disk and RAM requirements. The more agents and VRUs a customer has simultaneously logged in, the larger the package the customer needs.

PRODUCT CONFIGURATION - PRODUCT WORKSHEET 3/24/98

THIS SCREEN ALLOWS MULTIPLE ENTRIES

System ID: SUNCMS 2-CMS ACD DESIGN
 MAIN CMS ACD DESIGN SCREEN FOR.... ACD # 1

1. MAX TERM SESSIONS(NOT CENTREVV) SUPRVRS 0

AGENT INFORMATION.....

1. ACTUAL AGENTS (MAX #)....	URU'S MAX AGNT 0	# URU'S 0	
2. # OF AGENT LOGINS/SHIFT	SHIFT 1 0	SHIFT 2 0	SHIFT 3 0
3. # OF HOURS PER SHIFT	SHIFT 1 8	SHIFT 2 8	SHIFT 3 8
4. AVG # OF LOGOUTS/AGENT/SHIFT	SHIFT 1 4	SHIFT 2 0	SHIFT 3 0
5. STARTING TIMES FOR SHIFTS	SHIFT 1 800	SHIFT 2 0	SHIFT 3 0
6. LENGTH OF INTRUL & CALL	INTERVAL 30	AVG TIME 180	

SWITCH INFORMATION.....

1. SWITCH/VERSION & BUSV HR CALLS	SWITCH G3SI	VERSION US	BUSV HR 0
2. TRUNKS/TRNK GRPS & SPLTS/SKLLS	TRUNKS 0	TRNK GPS 0	SPLT/SKL 1

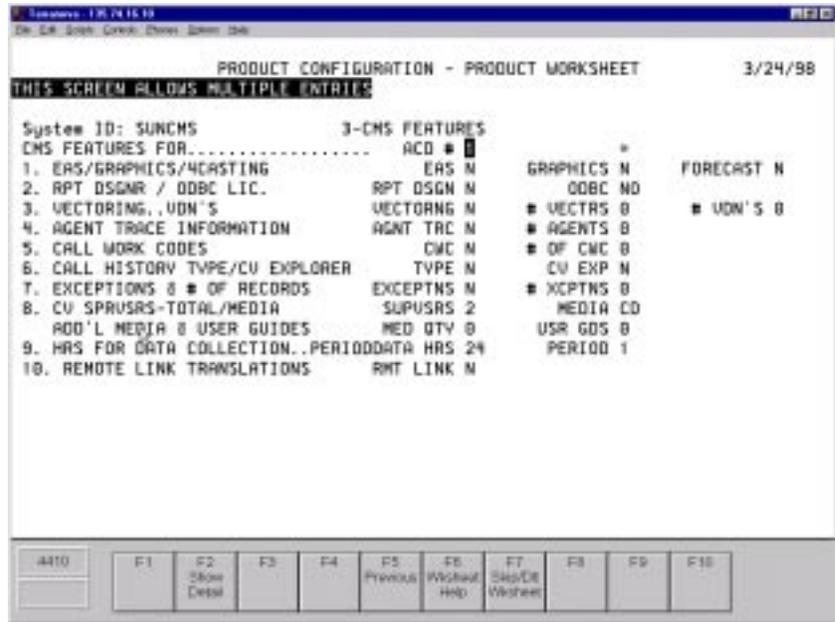
4410 F1 F2 F3 F4 F5 F6 F7 F8 F9 F10

Field Notes

- MAIN CMS ACD DESIGN SCREEN FOR.... ACD # - You need to fill out a separate worksheet for each ACD connected to CMS R3V6. Use this field to designate which ACD the rest of the information pertains to.
- MAX TERM SESSIONS (NOT CENTREVV) SUPRVRS - This field is only for Supervisors connected to *CentreVu* CMS R3V6 processor. Do not include CentreVu Supervisors that run on PCs.
- ACTUAL AGENTS (MAX #) - The total number of agents that will be simultaneously logged into the system. The number of VRUs logged into the system are also included in this field.
- # OF AGENT LOGIN/SHIFTS - This field requires the number of machines used to give customers messages and prompt them added to the maximum number of agents that will log in at any one time.

Screen 3

CMS FEATURES. This screen accepts information about the features the customer wants to order. This information affects the customer's Right-To-Use (RTU) fees and the amount of disk space they need.



Field Notes

- **Billable Products:** External Call History, CentreVu Explorer, Expert Agent Selection (EAS), Vectoring, Graphics, Forecasting and additional CentreVu Supervisor logins are size-sensitive packages.
- **Non-billable Products:** Internal Call History, Agent Trace Information, Call Work Codes and Exceptions, are not billable products, but they use disk space.
- CMS FEATURES FOR.... ACD # _: You need to fill out a separate worksheet for each ACD connected to CMS R3V6. Use this field to designate which ACD the rest of the information pertains to.
- HRS FOR DATA COLLECTION.. PERIODDATA: The default value is 24 hours. If data collection is turned off for part of a day, the data concerning the calls handled during that part of the day will not be saved.

Screen 4

The TRM/PRNTRS, SWITCH LINK HDWR worksheet is optional but frequently used. This worksheet is used to order peripheral pieces. Most of the questions concern serial devices that connect directly to the processor. The number of devices that connect directly to the processor affects the number of ports needed. The number of ports a customer will need is important to know when ordering serial connection devices such as a ports card or a Network Terminal Server. (NTS).

Field Notes

- TERMINALS & PRINTER FOR.... ACD # _: You need to fill out a separate worksheet for each ACD connected to CMS R3V6. Use this field to designate which ACD the rest of the information pertains to.
- SERIAL CONNECTION...AURORA/NTS: *Aurora*^{*} Port Cards (APC) are less expensive than Network Terminal Servers (NTS) and fit inside the computer. However these cards have several limitations. These cards expand capacity to only 8 or 16 ports; they are not compatible with the *SUN Enterprise* system 3000[†] (E3000); and they cannot be used if devices are placed more than 200 feet away from the processor.

The Network Terminal Server (NTS) overcomes these limitations. NTS expands capacity to 64 ports, is compatible with the E3000 and can be used with devices placed more than 200 feet away.

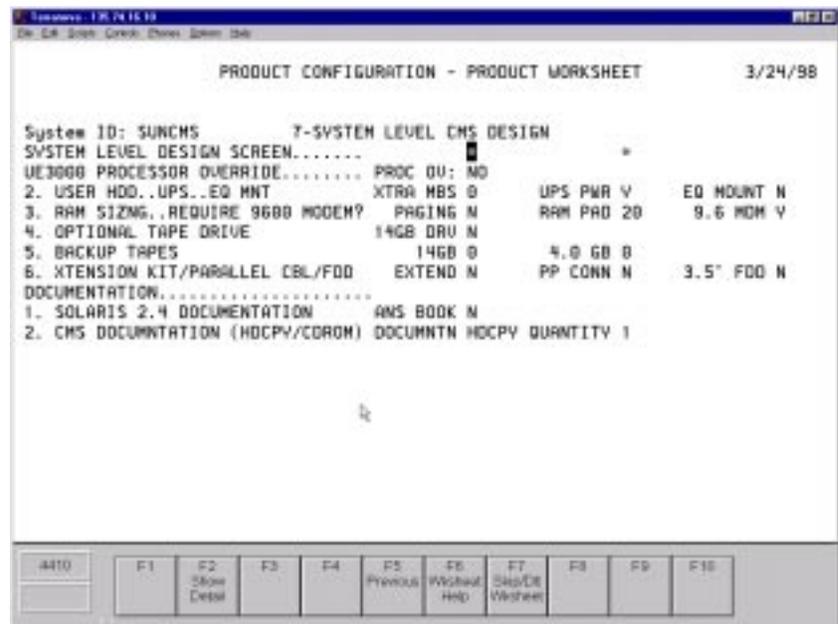
^{*}*Aurora* is a trademark of Aurora Technologies, Inc.

[†]*Enterprise* is a registered trademark of Sun Microsystems, Inc. in the United States and other countries.

Screen 7

The SYSTEM LEVEL CMS DESIGN worksheet helps determine the processor *CentreVu* CMS R3V6 will use and customize the amount of disk space the RAM it needs. You can also order optional tape drives, extension kits and documentation from this screen.

The paging segment can have a particularly large impact on the design. To the configurator, paging indicates how many pages of a document they system will keep in RAM at any one time. The more paging you order, the more RAM the design will include. You have three paging options; none, low and high. If a customer wants a fast processor, select the high option for additional RAM. If the customer is more price-conscious; select either the low or none option.



Field Notes

- **USER HDD..UPS..EQ MNT:** You can order a customer an extra hard drive in this segment. If you request 1800 extra Megabytes (MB)s, the configured design will include an additional hard drive.
- **BACKUP TAPES:** The 14 GB backup tapes for the E3000 are bundled in groups of ten. If you place a one next to the 14 GB backup tape option, you will get ten blank tapes and ten cleaning tapes. However, the backup tapes for the other processors are not bundled. If you place a one next to that backup tapes option, you will get only one backup tape.
- **XTENSION KIT/PARALLEL CBL/FDD:** The processors do not have floppy disk drives. If a customer wants to use floppy disks, you can order a floppy disk drive in this segment.

Screen 8

The APPLICATION INTEGRATION SRVCS worksheet is used to order some Professional Services. The services offered on this worksheet pertain mostly to vectoring, Expert Agent Selection (EAS), and *CentreVu* Supervisor. Any new or upgrade design may need some of the services listed in this worksheet. If you need more information, contact Professional Services at 1-800-776-4352.

PRODUCT CONFIGURATION - PRODUCT WORKSHEET 3/24/98

System ID: SUNCMS B-APPLICATION INTEGRATION SRVCS

APPLICATION INTEGRATION SERVICES.. *

1. CALL CENTER'S W/O EAS	STD WK N	OFFST/WK N	MKND CUT N
2. EAS DESIGN ONLY	STD WK N	PRE-G3U4 N	
3. EAS DESIGN AND IMPLEMENTATION	STD WK Y	MKND CUT N	PRE-G3U4 N
4. EAS REDESIGN (R5)	REDSGN N		
5. TECHNICAL SEASON TUNE-UP	TUNE-UP N		
6. CENTREUV SUPERVISOR SUPPORT	SERVICE N	TYPE N	UPGRADE N
7. TOKEN RING LAN SUPPORT/BOARD	SVC TYPE N	TR BOARD N	
8. REMOTE ACTIVATION OF 6 PRINTERS	PRINTERS 0		
MIGRATION SERVICES: (R2 UPGRADES)			
1. R2 (3B2 ONLY) MIGRATION TO R3	ADMIN N	HIST/RPT N	
2. R2 ADDITIONAL CUSTOM REPORTS	CR QTY 0		

4410 F1 F2 F3 F4 F5 F6 F7 F8 F9 F10

Show Detail Previous Worksheet Stop/Exit Worksheet Help

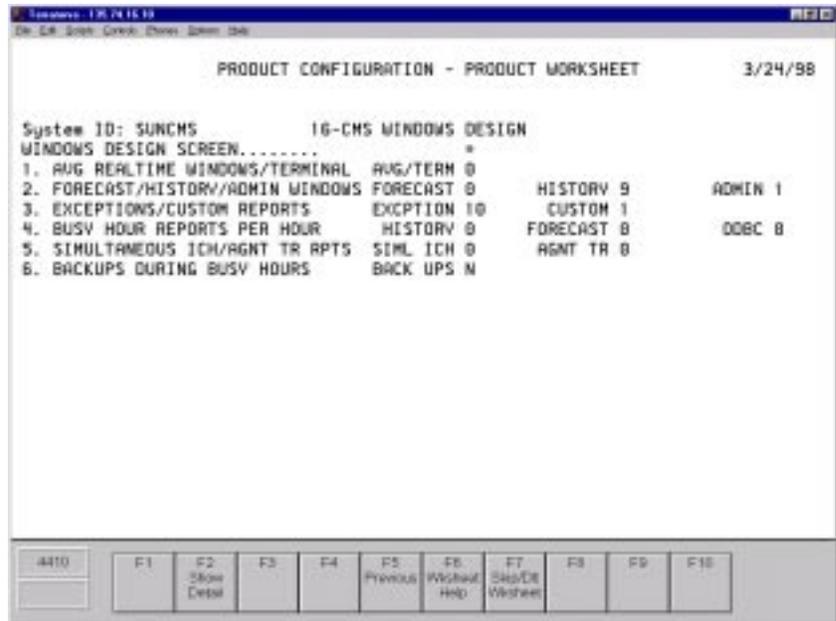
Field Notes

- **TECHNICAL SEASON TUNE-UP:** The amount of business a customer handles can vary greatly throughout a year. If a customer wants to change how the system is configured during the busier and slower times, a seasonal “tune-up” can be requested through this worksheet.
- **TOKEN RING LAN SUPPORT/BOARD:** CentreVu CMS R3V6 includes Ethernet. If a customer wants to use a token ring, you can request it on this worksheet.
- **REMOTE ACTIVATION OF 6 PRINTERS:** Professional Services will remotely activate printers connected to a LAN. This service can be requested in increments of six printers. For example, if a customer needs eight printers remotely activated, enter a two in the remote activation field. If a customer needs 15 printers activated, enter a three in the field.

Screen 16

The CMS WINDOWS DESIGN worksheet is one of the worksheets used to help calculate RAM. In general, the more windows and reports a customer wants open and generating at the same time, the more RAM the customer will need.

Determine the customer's priorities before filling out this worksheet. If the customer's main priority is having a high-performance system, then enter the maximum number of windows and reports the customer may possibly use. If the customer's main priority is keeping expenses to a minimum, then you may want to enter a smaller number of windows and reports.

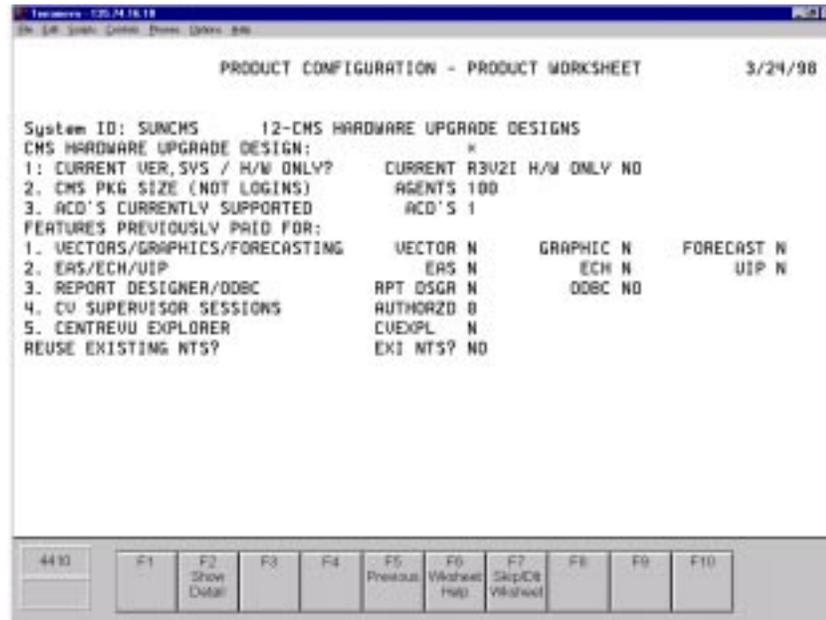


Hardware Upgrades

Hardware upgrades use the same worksheets as new designs plus screen 12 -CMS HARDWARE UPGRADE DESIGNS. You need to provide the same information you provided with new designs plus the information requested in worksheet 12.

Screen 12

CMS HARDWARE UPGRADE DESIGNS. The information used in this worksheet is compared to the information supplied in other screens. Customers are not charged for features they already have, but are charged for new features they choose to add.



Software Upgrades

Upgrading CMS software can involve changing to a more recent version of *CentreVu* CMS, adding new features or both. Software upgrades use only Worksheet 13 -SOFTWARE UPGRADE DESIGNS. Because the information in this worksheet is not checked against other worksheets; it's particularly important to enter accurate information about the existing system.

PRODUCT CONFIGURATION - PRODUCT WORKSHEET 3/24/98

System ID: SUNCMS 13-SOFTWARE UPGRADE DESIGNS
 SOFTWARE UPGRDS ARE EXCLUSIVE, SEEHELP.

1. CURRNT PLTFM/PRE-PD UIP/DOCHNTN PLTFM 3332 UIP N
 2. CURRNT/TARGET VERSION/U4 PASSWD? CURRENT R3V2 TARGET R3V6
 3. # OF SIMULT. TERMINAL SESSIONS SESSIONS 0
 FEATURES TO BE ADDED/PAID FOR.....

1. CU SPRUSR SESS-NEW TOTAL/EXIST	TOTAL 0	AUTHORZD 0	MEDIA CD
ADDITIONAL MEDIA & USER GUIDES	MED QTY 0	USR GDS 0	
2. CU EXPLORER/ODBC/CMS LOAD	CUEXP N	ODBC NO	RI.F? NO
3. EXT. CALL HIST/ACASTNG/GRAPHICS	ECH N	ACASTNG N	GRAPHICS N
4. VECTURING/EAS/REPORT DESIGNER	VECTORS N	EAS N	RPT DSGN N
5. AGENT SIZE CURRENT/TARGET	CURRENT 100	TARGET 100	
6. PROVIDE ONLINE DISK SUITE?	SKILL PRS N		

4410 F1 F2 Show Detail F3 F4 F5 Previous Worksheet F6 Next Worksheet F7 F8 F9 F10

Field Notes

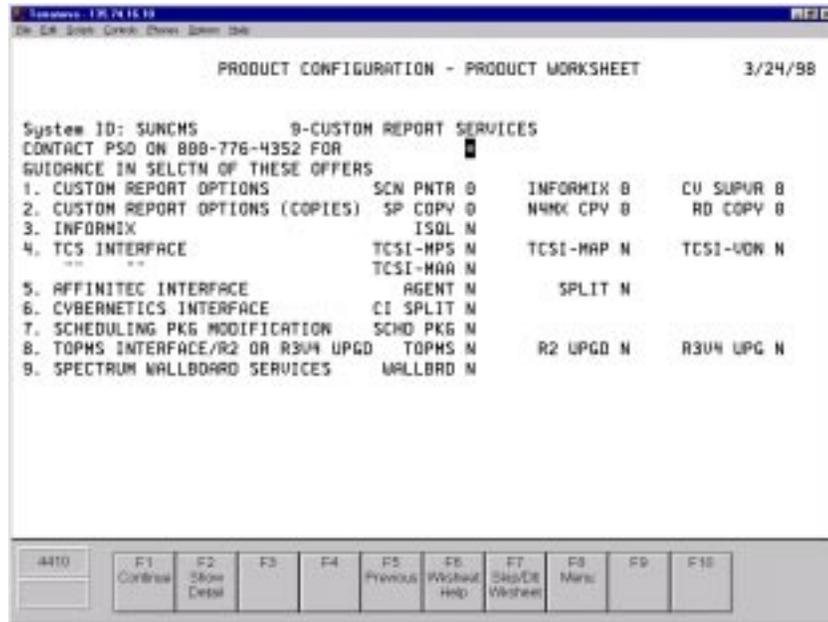
- **ADDITIONAL MEDIA & USER GUIDES:** Regardless of how many *CentreVu* Supervision sessions a customer orders, they will only receive five copies of the software and five user guides. If a customer ordered 20 Supervisor sessions and wants 20 user guides, they will need to order 15 additional guides.
- **VECTURING/EAS/REPORT DESIGNER:** Vectoring and EAS are size sensitive. If a customer adds 100 agents to the system, the customers also have to pay a RTU fee to cover those additional agents.

Optional Worksheets

Sometimes you need to enter additional information in order to successfully configure the *CentreVu* CMS R3V6 section of a call center. These optional screens can be used to order additional products and services. You can order upgrade insurance, training, more Professional Services training, and additional RAM

Screen 9

The CUSTOM REPORT SERVICES worksheet is used to order additional Professional Services. The additional services include designing and activating custom reports, giving *CentreVu* CMS R3V6 the ability to share data with selected programs, plus a variety of other services. Contact Professional Services at 800-776-4352 before using this worksheet. Design support does not advise on this worksheet, only Professional Services can give accurate information about this worksheet.



Screen 10

The ADDITIONAL TRAINING worksheet is used to order additional training for customers. The training material comes in three formats; classroom, CD ROM and video. The classroom training covers how to administer *CentreVu* CMS R3V6 and how to create custom reports in *CentreVu* CMS R3V6. The CD ROM material covers how to use Supervisor and how to create custom reports in Supervisor. The video training covers skills used by call center agents and their managers.

The screenshot shows a window titled "PRODUCT CONFIGURATION - PRODUCT WORKSHEET" with a date of "3/24/98". The system ID is "SUNCMS". The training options are listed as follows:

CLASSROOM TRAINING:		10-ADDITIONAL TRAINING	
1. ADMINISTRATION TRAINING	NO EAS 0	W/63 EAS 0	62.2/ERS 0
2. CMS CUSTOM REPORT TRAINING	CMS RPT 0		
3. SPLIT SUPERVISORS TRAINING	SPLIT 0		
CD ROM TRAINING:			
1. SUPERVISOR TRAINING	SPLIT CD 0	CENTREUU 0	
2. REPORT TRAINING	INTRPTNG 0	CUSTOM 0	
VIDEO TRAINING:			
1. TELEPHONE VOICE & ETIQUETTE	ETIQUETE 0		
2. CALL CENTER TRAINING	CMS APPL 0	AGENT 0	
3. INBOUND TELEMARKETING	TELEMRKT 0		

At the bottom of the window, there is a control bar with buttons for F1 (Continue), F2 (Show Detail), F3, F4, F5 (Previous), F6 (Without HHD), F7 (Skip/DE Worksheet), F8 (Menu), F9, and F10. A numeric field "4410" is also present.

Field Notes

- ADMINISTRATION TRAINING: All customers automatically get to send two students to this class within six months of their purchase. If a customer wants to have classroom training for four people, enter a two in this field.
- CMS CUSTOM REPORTS TRAINING: Customers can also send two students to this class at no extra cost. However, the students attending this class must have attended the administration training class beforehand. It is also recommended that the students use CMS for two to three months before attending this class.

Screen 11

Occasionally, a customer will need to transfer data from one CMS system to another. The customer will need extra disk space to store the data from the first CMS system during the data transfer. The CMS PSEUDO-ACD worksheet is used to order the extra storage space. This data transfer process is rarely used. Contact SDSC before ordering anything from this worksheet.

PRODUCT CONFIGURATION - PRODUCT WORKSHEET 3/24/98

System ID: SUNCMS 11-CMS PSEUDO-ACD

PSEUDO-ACD DATA: (IN MEGABYTES)

1. AGENT DATA	AGENT 0
2. SPLIT DATA	SPLIT 0
3. TRUNK GROUP DATA	TK GROUP 0
4. TRUNK DATA	TRUNK 0
5. VDN DATA	VDN 0
6. VECTOR DATA	VECTOR 0
7. CALL WORK CODE DATA	CL WK CD 0
8. EXCEPTION DATA	EXCEPTN 0
9. AGENT TRACE DATA	AG TRACE 0
10. FORECAST DATA	FORECAST 0
11. AGENT LOGIN DATA	AGT LOG 0

4410

F1 Control	F2 Show Detail	F3	F4	F5 Previous	F6 Worksheet Help	F7 Exit/End Worksheet	F8 Menu	F9	F10
---------------	----------------------	----	----	----------------	-------------------------	-----------------------------	------------	----	-----

Screen 14

The SUNCMS UPGRADE INVESTMENT PLAN worksheet is used to order Upgrade Investment Protection (UIP). Customers using this plan reduce the cost of upgrades. This program covers CMS software upgrades and other associated software changes for three years. This includes programs like *CentreVu* Supervisor and the *Solstice** for Server Connect X.25 Network Interface software. This program also covers the upgrade installation charges.

UIP does not cover activation or new chargeable features. Hardware upgrades and additions also fall outside the range of this program. The customer will still be charged the conventional rates for data migrations and migrating custom reports if they purchase this program.

The screenshot shows a terminal window titled "PRODUCT CONFIGURATION - PRODUCT WORKSHEET" with a date of 3/24/98. The main content area displays the following text:

```
System ID: SUNCMS      14-SUNCMS UPGRADE INVESTMENT PLAN
SUNCMS UPGRADE INVESTMENT PLAN
1. CURRENT CMS VERSION..... VERSION CWS04
2. TYPE OF UIP CONTRACT & LENGTH..UIP TYPE M      LENGTH 2
```

At the bottom of the window is a control panel with the following buttons:

4410	F1 Continue	F2 Show Detail	F3	F4	F5 Previous	F6 Wkst/Help	F7 Stop/Exit Worksheet	F8 Menu	F9	F10
------	----------------	----------------------	----	----	----------------	-----------------	------------------------------	------------	----	-----

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

Screen 15

The MISCELLANEOUS RAM/HDD worksheet is used to order additional RAM, disk space and other components for the Intel platform and older Sun platforms. You should have a thorough knowledge of your customer's system and needs before ordering from this worksheet. Consult the SDSC if you have specific questions.

PRODUCT CONFIGURATION - PRODUCT WORKSHEET 3/24/98

System ID: SUNCMS 15-MISCELLANEOUS RAM/HDD
RAM/HDD/BLANK TAPES TO BE ADDED... *

INTEL:

1. 386 33/25	4K16 BD 0		
2. STARSERVER	16MB BD 0		
3. NCR 3332	16MB BD 0	INT HDD 0	
4. EXT HDD/SCSI HDD	EXT HDD 0	SCSI HDD 0	

SUN:

1. RAM (SPARC5/SPARC20)	32 MB 0	64 MB 0	
2. DISK DRIVES	SCSI 0	INT HDD 0	EXT HDD 0
3. 3.5" FLOPPY DRIVE	TYPE N	QUANTITY 0	
4. BLANK TAPES	5GB 0	QIC 150 0	

4410

F1 Continue	F2 Show Detail	F3	F4	F5 Previous	F6 Workset Help	F7 Skip/Exit Worksheet	F8 Menu	F9	F10
----------------	----------------------	----	----	----------------	-----------------------	------------------------------	------------	----	-----

Non-U.S. Configuration of CentreVu CMS R3V6 Call Centers

General Information

The Order Management Interface (OMNI) configurator is used to design *CentreVu* Call Management Systems (CMS). Entering accurate information into the configurator's screens is a key part of successfully designing the *CentreVu* CMS R3V6 piece of a call center. This chapter gives a brief overview of different aspects of the configurator. The screens in this chapter are examples based on Canadian options. Not every country has these same options.

This chapter describes:

- Accessing the configurator
- Selecting the correct worksheets
- Worksheets used for new designs
- Worksheets used for hardware upgrade designs
- Worksheets used for software upgrade designs

Currently, ITAC supports the OMNI configurator and international orders. For more detailed information about the OMNI configurator call ITAC at (303) 538-4666.

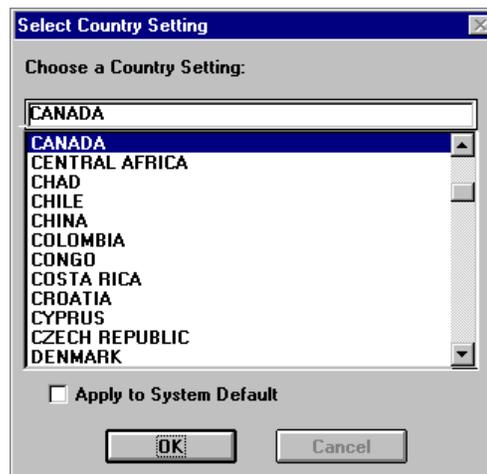
Accessing the Configurator

Follow the steps in this section to access the configurator

1. Open the OMNI program. The system displays a blank screen.



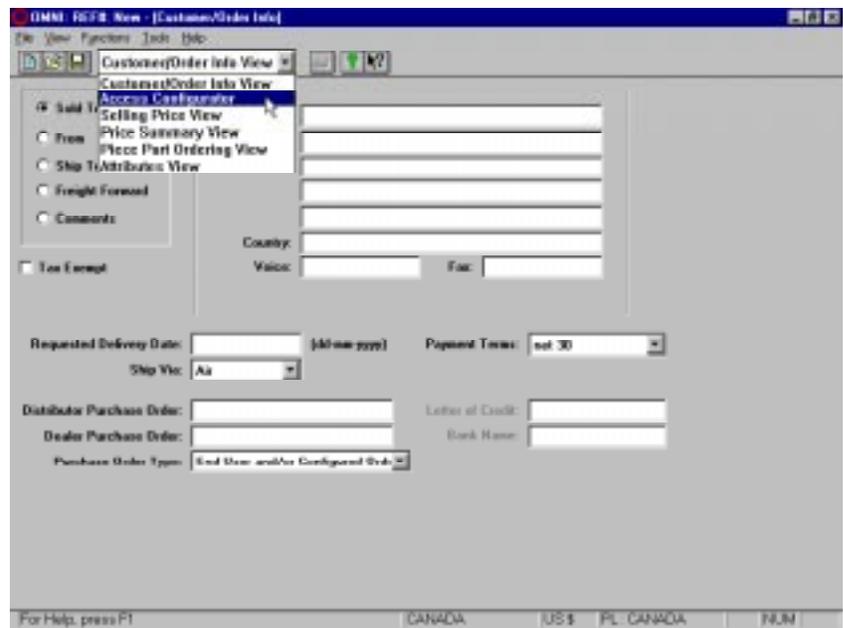
2. Select the New option from the File Menu. The system displays the Select Country Setting option box.



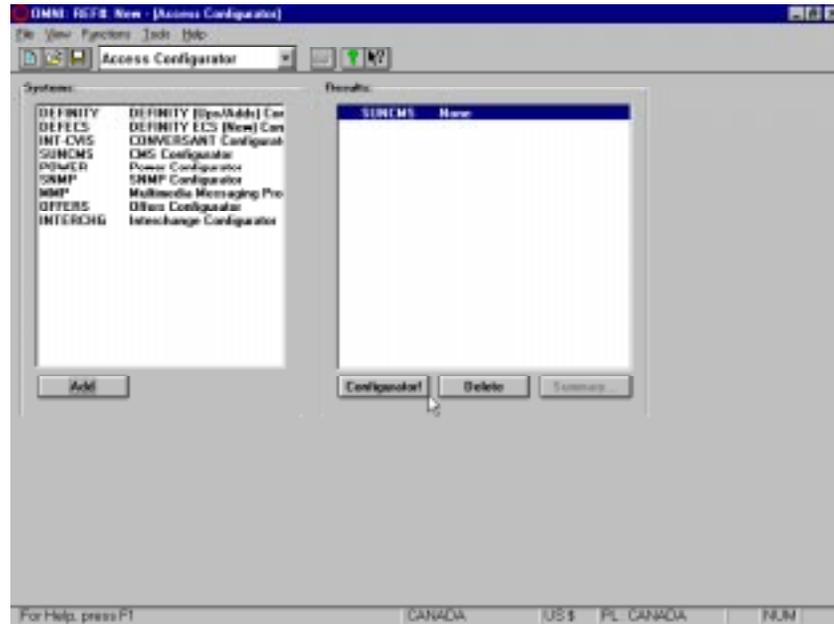
3. Select the appropriate country. The system displays the Price List option box.



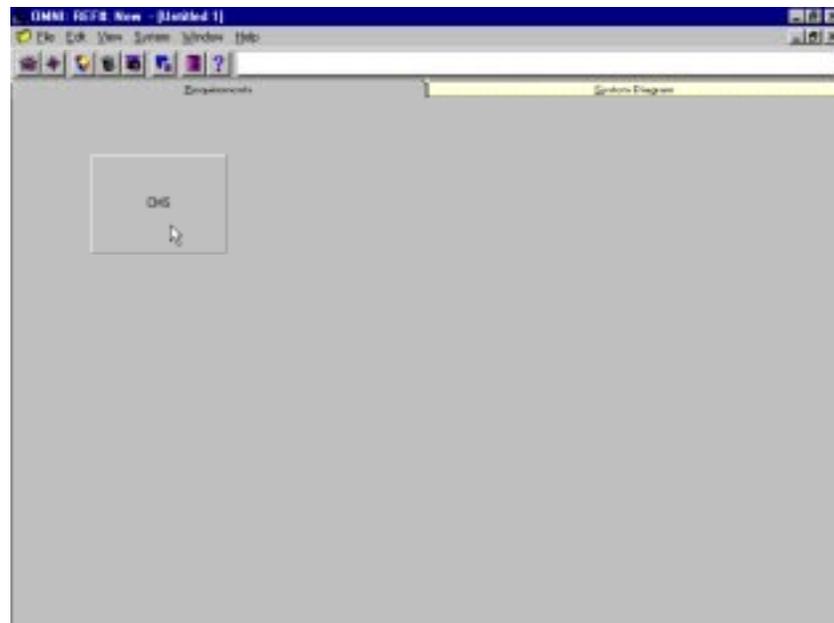
4. Select the appropriate price list. The system displays the Customer/Order Info View screen.



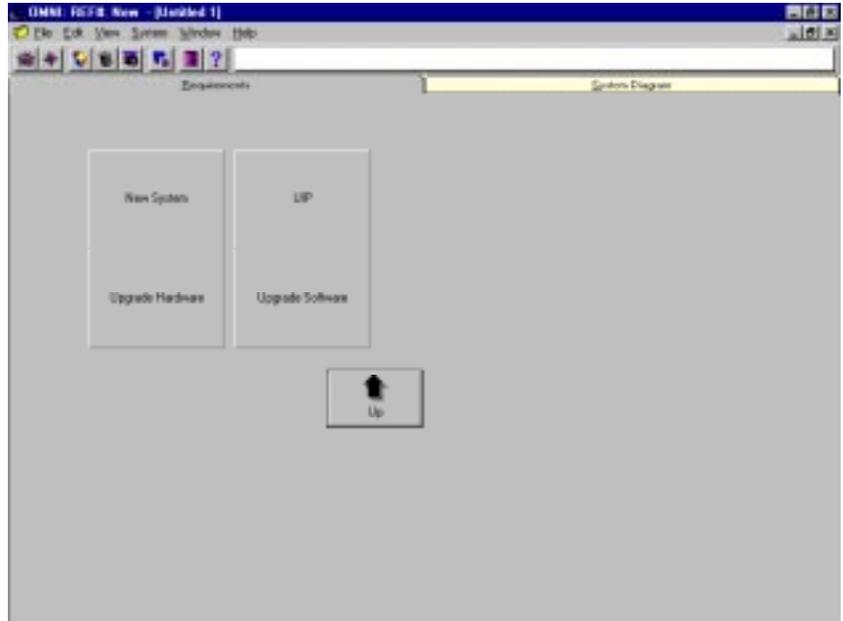
5. Select the Access Configurator screen. The system displays the Access Configurator screen.



6. Select the SUNCMS configurator. The system displays the CMS screen.



7. Click on the CMS button. The system displays the screen that allows you to choose whether you want to configure a new design, configure a hardware upgrade, configure a software upgrade or order an Upgrade Investment Plan (UIP).



The following sections of this chapter describe the different options you can select from this screen.

New Systems

New systems require the most information. You need to provide information about how many agents the customer's call center supports; which features and peripherals the customers wants; which miscellaneous components the customer needs to properly modify the call center; and any professional services the customer requests.

The figure below shows the New Systems menu screen.



ACD Design

The OMNI configurator has a separate group of required screens for Automatic Call Distributions (ACDs). You reach these screens by clicking on the !New/Edit ACD button in the New Systems menu screen. The system requires you to name the ACD and then displays the ACD Requirements screen. The configurator requires you to enter switch information, agent information and features information. Use the optional screens to customize the new system.



The agent information is crucial to determining which package the customer needs along with the disk and RAM requirements. The more agents and Voice Response Units (VRU)s a customer has simultaneously logged in, the larger the package the customer needs.

Features are ordered in this section of the configurator. Some features are billed on a Right To Use (RTU) basis. How many features a customer orders affects the customer's Right-To-Use (RTU) fees and the amount of disk space they need

- **Billable Features:** External Call History, CentreVu Explorer, Expert Agent Selection (EAS), Vectoring, Graphics, Forecasting and additional CentreVu Supervisor logins are size-sensitive packages.
- **Non-billable Features:** Internal Call History, Agent Trace Information and Call Work Codes, Exceptions, are not billable products, but they use disk space.

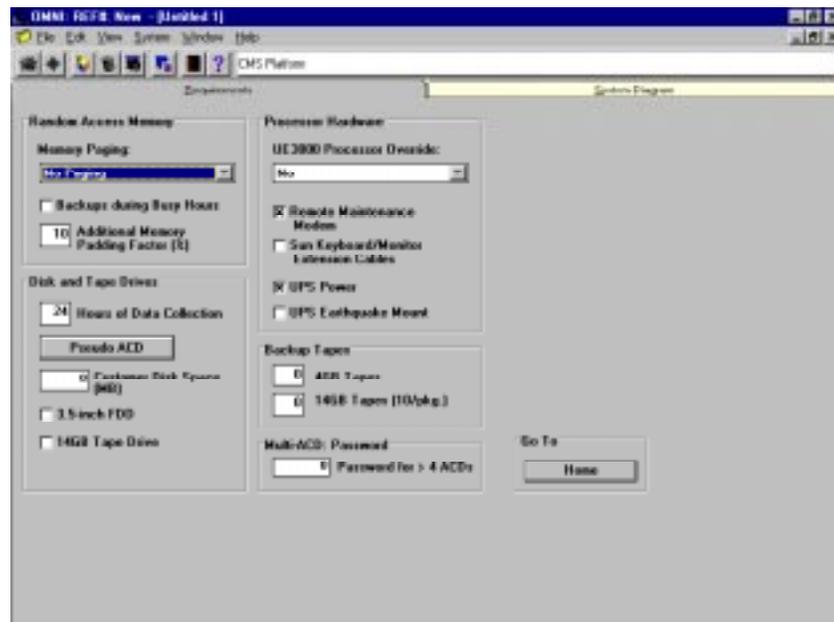
CMS Design

The OMNI configurator uses information from several screens to design the CMS system. You reach these screens through the new systems menu screen

CMS Platform

The fields in the CMS Platform screen help determine the amount of memory and disk space the customer needs. You enter information about the platform, tape drives and data collection into this screen.

The paging segment can have a particularly large impact on the design. To the configurator, paging indicates how many pages of a document they system will keep in RAM at any one time. The more paging you order, the more RAM the design will include. You have three paging options; none, low and high. If a customer wants a fast processor, select the high option for additional RAM. If the customer is more price-conscious; select either the low or none option



Field Notes

- Hours of Data Collection: The default value is 24 hours. If data collection is turned off for part of a day, the data concerning the calls handled during that part of the day will not be saved.
- Backup Tapes: The 14 GB backup tapes are bundled in groups of ten. If you place a one in the 14 GB backup tape field, you will get ten blank tapes and ten cleaning tapes. However, the backup tapes for the other processors are not bundled. If you place a one next to that backup tapes option, you will get only one backup tape.

CMS Windows and Reports

The more windows and reports a customer wants to run simultaneously, the more memory they will need. The first section determines how many windows the customer will keep open to run reports. The next section determines how many reports the customer will run.

UMMS - R3V6 - New - [Unsaved 1]

File Edit View System Window Help

Windows & Reports

Requirements

System Program

Windows / Reports Information

Average Number of Realtime Windows per Terminal

Number of Windows Used For the Following:

Administration Historical

Forecast Realtime Exception Logs

Total Number of Windows Used For Custom Reports:

Number of Windows Used to Create or Modify Custom Reports During Busy Hours

Number of Reports Run (per Hour) During Busy Hours:

Forecast Internal Call History

Historical EDIC

Total Number of Agent Trace and Internal Call History Reports Run Simultaneously During Busy Hours

Go To

Home

Professional Services

Professional Services can assist customers in several areas. Any new design may need some of the services listed in this screen. The additional services include custom reports, various interfaces, and other services. If you need more information, contact Professional Services at 1-800-776-4352.

The screenshot shows a software window titled "Professional Services" with a menu bar (File, Edit, View, System, Window, Help) and a toolbar. The main content area is divided into several sections:

- Services:**
 - Application Integration Services:** A dropdown menu set to "EAS Design & Implement - Got Work".
 - CentreVu Supervisor Services:** A dropdown menu set to "No CentreVu Services".
 - LAN Services:** A dropdown menu set to "No LAN Services", with two checkboxes below: "Token Ring Based" (unchecked) and "Remote Activation of Network Printers" (unchecked).
 - Wallboard Services:** A dropdown menu set to "No Spectrum Wallboard Services".
 - Tune-Up Services:** A dropdown menu set to "No Tune-Up Services".
- Custom Report Services:**
 - Reports:** A table with columns "Reports" and "Copies".

Screen Painter	0	0
INFORMIX	0	0
Report Designer	0	0
 - Scheduling Package Reports:** A dropdown menu with options: "TCS - Mospower Planning System", "TCS - Mospower Agent Productivity", "TCS - VDM Report", and "TCS - Mospower Agent Adherence".
- International Services:** A dropdown menu set to "Non-Passport Countries (See Help)".

At the bottom right, there is a "Go To" section with a "Home" button.

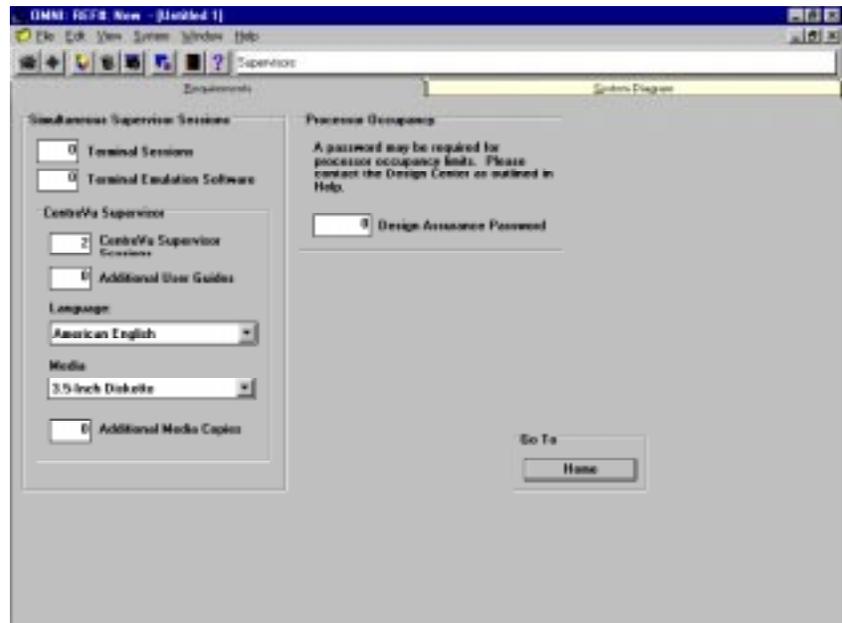
Field Notes

- **LAN Services:** CentreVu CMS R3V6 includes Ethernet. If a customer wants to use a token ring, you can request it on this worksheet.
- **Remote Activation of Network Printers:** Professional Services will remotely activate printers connected to a LAN. This service can be requested in increments of six printers. For example, if a customer needs eight printers remotely activated, enter a two in the remote activation field. If a customer needs 15 printers activated, enter a three in the field.
- **Tune Up Services:** The amount of business a customer handles can vary greatly throughout a year. If a customer wants to change how the system is configured during the busier and slower times, a seasonal "tune-up" can be requested through this worksheet.
- **International Services:** Non-passport countries order any Professional Services available to them through SPE -0424-005. Call (303) 850-8346 for more information about non-passport countries.

Supervisor

This screen is used to order the Supervisor feature. Supervisor terminal sessions run on machines that connect directly to the *CentreVu* CMS R3V6 computer. Each Supervisor terminal session needs terminal emulation software in order to run.

CentreVu Supervisor runs on *Windows*-based PCs. Each customer receives two *CentreVu* Supervisors at no cost. However, customers do have to pay for any additional copies of *CentreVu* Supervisor.



Training

Use the Training screen to order course material for customers. The training material comes in three formats; classroom, CD ROM and video.

Classroom training is not automatically available outside the United States. Each countries' sales organization determines what classroom training to offer.



Field Notes

- CDROM Training: Covers how to use Supervisor and how to create custom reports in Supervisor.
- Video Training: Covers skills used by call center agents and their managers.

Upgrade Hardware

Customers upgrade their hardware for a variety of reasons. They may want to upgrade from an *Intel*-based platform to a *SPARC* platform. Or they may need a larger platform, such as the *SUN Enterprise* system 3000* (E3000).

The figure below shows the Upgrade Hardware menu screen. The exclamation marks indicate required screens.



**Enterprise* is a registered trademark of Sun Microsystems, Inc. in the United States and other countries.

ACD Design

The OMNI configurator has a separate group of required screens for Automatic Call Distributions (ACDs). You reach these screens by clicking on the !New/Edit ACD button in the Upgrade Hardware menu screen. The system requires you to name the ACD and then displays the ACD Requirements screen. The configurator requires you to enter switch information, agent information and features information. Use the optional screens to customize the new system.



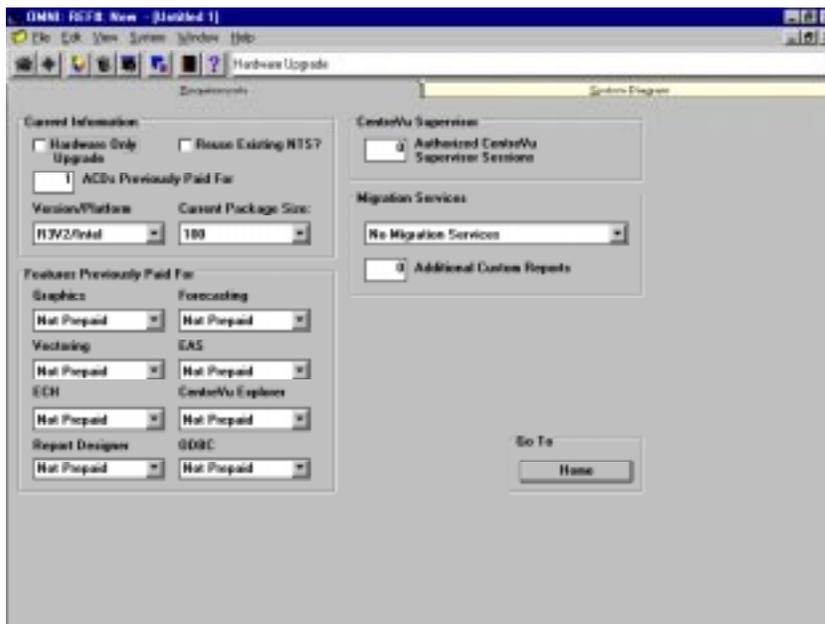
The agent information is crucial to determining which package the customer needs along with the disk and RAM requirements. The more agents and Voice Response Units (VRU)s a customer has simultaneously logged in, the larger the package the customer needs.

Features are ordered in this section of the configurator. Some features are billed on a Right To Use (RTU) basis. How many features a customer orders affects the customer's Right-To-Use (RTU) fees and the amount of disk space they need

- **Billable Features:** External Call History, CentreVu Explorer, Expert Agent Selection (EAS), Vectoring, Graphics, Forecasting and additional CentreVu Supervisor logins are size-sensitive packages.
- **Non-billable Features:** Internal Call History, Agent Trace Information and Call Work Codes, Exceptions, are not billable products, but they use disk space.

Hardware Upgrade

The Hardware Upgrade screen compares information about the customer's current hardware design to their upgrade design. Customers are not charged RTU fees for features they already have, but are charged additional RTU fees for new features they choose to add.



Field Notes

- **Hardware Only:** This field applies only when the customer is upgrading from an *Intel* platform to a *Sun* platform or when the customer has *CentreVu* CMS R3V2 or later.
- **Authorized *CentreVu* Supervisor Sessions:** Enter the number of *CentreVu* Supervisor Sessions the customer has in their existing system.
- **Migration Services:** You can order Professional Services' data migration package through this screen if the customer is upgrading from *CentreVu* CMS R3V 2 or 3 to the most recent *CentreVu* CMS version. For information about other data migration options, call Professional Services at 800-776-4352.

CMS Platform

The screens in this section are the same as the corresponding screens for a New System. Refer to the "New System" section for more information.

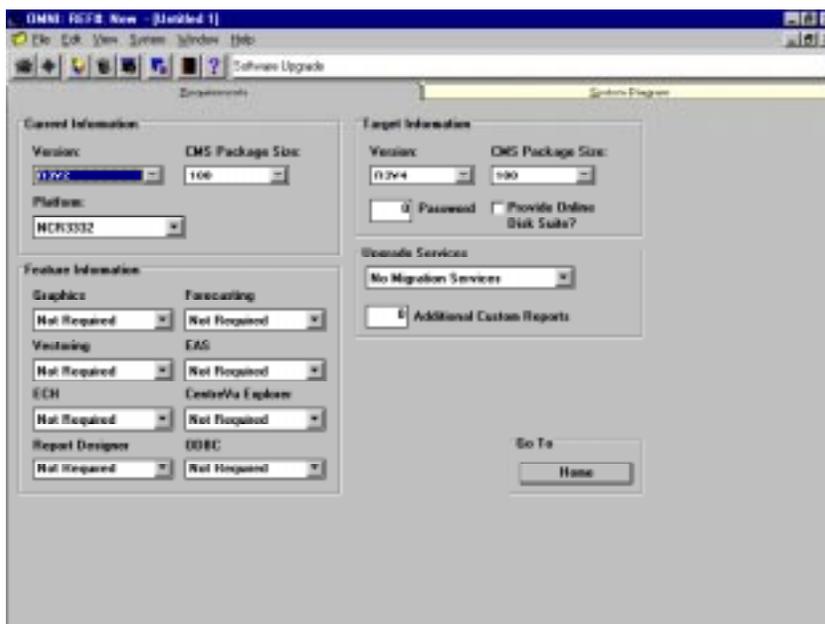
Upgrade Software

Upgrading CMS software can involve changing to a more recent version of *CentreVu* CMS, adding new features or both. The figure below shows the Upgrade Software menu screen. The exclamation marks indicate required screens.



Software Upgrade

The Software Upgrade screen compares information about the customer's current software design to their upgrade design. Customers are not charged RTU fees for features they already have, but are charged additional RTU fees for new features they choose to add.



Field Notes

- Platform: CentreVu CMS R3V6 only runs on *Sun* platforms. Customers who continue using the *Intel* platform cannot upgrade to version six of *CentreVu* CMS. All bug fixes for the *Intel* platform will be made in version five of *CentreVu* CMS.
- Upgrade Services: You can order Professional Services' data migration package through this screen if the customer is upgrading from *CentreVu* CMS R3V 2 or 3 to the most recent *CentreVu* CMS version. For information about other data migration options, call Professional Services at (800) 776-4352.

CentreVu Upgrade

The *CentreVu* Upgrade screen is used to upgrade *CentreVu* Supervisor. Enter the number of *CentreVu* Supervisors the customer currently has in the Authorized *CentreVu* Supervisor Sessions field. Enter the number of *CentreVu* Supervisors they want in their new design in the Total *CentreVu* Supervisor Sessions field.



Training and Professional Services

The Training and Professional Services screens are required for software upgrade designs. The Training and Professional Services screens for software upgrades are the same as the Training and Professional Services screens used for New Systems. Refer to the “New Systems” section for more information.

Software Upgrade Design Options

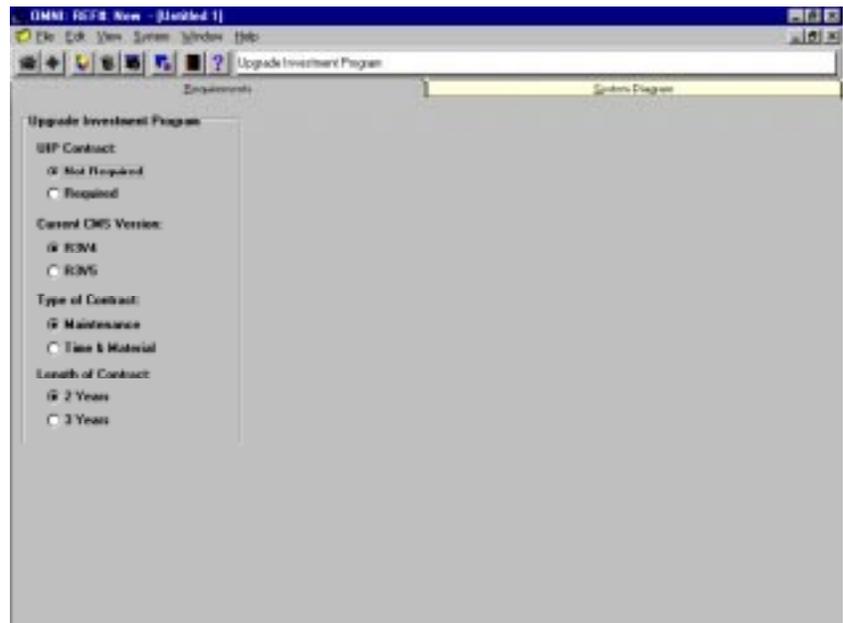
A customer may need additional hardware if the new software design is significantly different from the current design. The optional screens under this heading allow you to order hardware components necessary for supporting the new software design.

UIP

Upgrade Investment Protection (UIP) is available only in the United States. It can be ordered by customers who own *CentreVu* CMS R3V2 or later.

Customers using this plan reduce the cost of upgrades. This program covers CMS software upgrades and other associated software changes for three years. This includes programs like *CentreVu* Supervisor and the *Solstice** for Server Connect X.25 Network Interface. This program also covers the upgrade installation charges.

UIP does not cover activation or new chargeable features. Hardware upgrades and additions also fall outside the range of this program. The customer will still be charged the conventional rates for data migrations and migrating custom reports if they purchase this program.



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

Implementing *CentreVu* CMS R3V6

General Information

This chapter provides a general overview of the implementation process. It describes roles and responsibilities involved in provisioning *CentreVu* CMS R3V6. This chapter does not cover the specific steps involved in carrying out the responsibilities. For a list of documents that contain more specific information, refer to the Additional References section of this chapter.

Prerequisites

Some preparation must occur before implementing *CentreVu* CMS R3V6. This involves site preparation, data collection, and scheduling.

Site Preparation

The Account Team is responsible for site preparation. Site preparation includes planning where to place the equipment, how to ensure that any hardware piece that needs access can connect to the network, and how to ensure each hardware piece has access to power outlets. This planning by the Account Team insures that customers have the space, power, cabling, adapters, and any other ancillary equipment they need for *CentreVu* CMS R3V6 to work properly at their locations. Connectivity diagrams are available in the hardware installation guides and in the connectivity guides.

Data Collection

The Account Team works closely with the customer and services group to gather data. The Account Team needs to finish gathering data at least two weeks prior to provisioning the system. Data from U.S. accounts is sent to the Sales Design and Support Center (SDSC) and TSC. Data from non-U.S. accounts should be sent to the Center of Excellence.

Scheduling

After the Account Team's design is approved, it assigns a Project Manager. The Project Manager contacts the Technical Services Center (TSC) CMS Provisioning Group at (800) 242-2121 x84699 in order to schedule provisioning for the approved design. The Project Manager should contact the CMS Provisioning Group at least two to three weeks before the cutover date.

The Standard Provisioning Offer for New Systems

This section provides a brief summary of the standard *CentreVu* CMS R3V6 provisioning offer.

1. The Project Manager contacts the TSC CMS Provisioning Support group to schedule their assistance with final provisioning at least two weeks in advance.
2. The system is assembled, loaded and tested based on the Account Team's approved design at the Denver factory.
3. The entire initialized system is shipped to the customer site.
4. The technician completes the following tasks:
 - Unpack the system
 - Install the processor
 - Install the terminal hardware
 - Link to the switch
 - Power up CMS
5. The Provisioning Support group administers various CMS parameters and activates features based on information provided by SDSC.
6. The Provisioning Support Group administers "agent authorization" for the agent-sized package purchased and for the number of *CentreVu* Supervisor logins purchased.
7. The Provisioning Support group sets up one administrative ID.
8. The DSIC technician performs an initial backup of the system after the system is operational. However, this backup will not have any customer data because *CentreVu* CMS R3V6 will not be in service before the initial backup.
9. The technician verifies that the customer changes all the passwords from the defaults.

NOTE:

If *CentreVu* CMS R3V6 is installed as an after-market addition, the Project Manager/Software Specialist ensures that all necessary link translations are performed. In new system sales, part of the PBX initialization provides the translations. When a customer adds *CentreVu* CMS R3V6 to an existing call center, the translations must be performed separately and incurs additional time and maintenance charges.

Upgrade *Sun* Platforms

This section provides a brief summary of the steps involved in upgrading a *Sun* platform. See the *CentreVu Call Management System Release 3 Version 6 Upgrades and Migrations* (Doc # 585-215-856) (Comcode 108144858) for more detailed information.

1. The Project Manager contacts the TSC CMS Provisioning Support group to schedule their assistance at least two weeks in advance.
2. The Project Manager prepares the customer's system for the upgrade and mails the backup tapes to the Speed Center.
3. The Speed Center configures the lab machine to match the customers.
4. The Speed Center builds a new hard drive that matches the customer's new approved design.
5. The Speed Center transfers the customer's data to the new hard drive.
6. The Speed Center sends the new hard drive to the customer.
7. An on-site technician sets up the new hard drive, connects it to the system and mails back any equipment the customer no longer needs to support the new design.

Additional References

This chapter summarizes the steps involved in provisioning systems for customers. For more detailed information, refer to the documents listed below.

- *CentreVu Call Management System Release 3 Version 6 Upgrades and Migrations* (Doc # 585-215-856) (Comcode 108144858)
- *CentreVu Call Management System Release 3 Version 6 Sun SPARCserver Computers Hardware Installation* (Doc # 585-215-857) (Comcode 108144874)
- *CentreVu Call Management System Release 3 Version 6 Sun SPARCserver Computers Connectivity Diagram* (Doc # 585-215-858) (Comcode 108145285)
- *CentreVu Call Management System Release 3 Version 6 Sun Enterprise 3000 Computer Hardware Installation* (Doc # 585-215-867) (Comcode 108145319)
- *CentreVu Call Management System Release 3 Version 6 Sun Enterprise 3000 Computer Connectivity Diagram* (Doc # 585-215-865) (Comcode 108145293)
- *CentreVu Call Management System Release 3 Version 6 Software Installation* (Doc # 585-215-866) (Comcode 108145301)
- *CentreVu Call Management System Release 3 Version 6 Hardware Maintenance and Troubleshooting* (Doc # 585-215-861) (Comcode 108145400).

If you have access to the internet, you can also find information through *IntraWorks* at <http://www.bcs.lucent.com/>. The two most useful sections are:

- Sales and Marketing
- Solution Realization and Delivery.

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X

XTENSION KIT/PARALLEL CBL/FDD field	5-11
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