



# **IP Office 3.0**

Compact Business Center



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# Table of Contents

<b>Introduction</b> .....	<b>5</b>
CBC Overview .....	5
The CBC Screen .....	6
<b>Installation</b> .....	<b>7</b>
CBC Installation Requirements .....	7
PC Requirements.....	7
Email Notification .....	7
Entering the CBC License .....	8
Installing Delta Server .....	9
Starting the Delta Server Service .....	10
Accessing the Delta Server .....	11
Problems Accessing the Delta Server .....	11
Comms (IP Office) Configuration.....	12
Installing the CBC Software.....	13
Starting CBC (First Time) .....	13
Creating Charts .....	16
<b>Using CBC</b> .....	<b>21</b>
Starting CBC (Normal).....	21
Change the Selected Groups .....	22
Key Performance Indicators .....	23
Trunk Utilization Graph.....	24
Zooming Into Charts.....	25
Amending Charts.....	26
Deleting Charts.....	26
CBC Alarms.....	26
Alarm Notification .....	26
Email Notification.....	27
<b>Index</b> .....	<b>29</b>



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# Introduction

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## CBC Overview

The IP Office Compact Business Center (CBC) is designed to provide a summary of both current and historical activity on an IP Office telephone system. It provides both overall system performance information and information on up to 3 selected hunt groups.

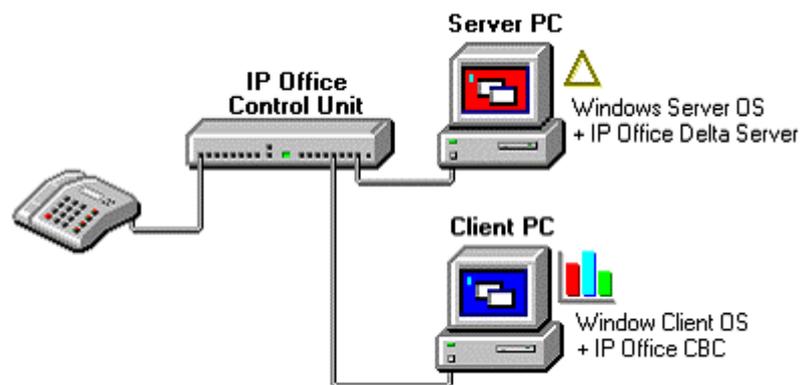
Data is written every minute to a CSV file for each day. The CBC is able to access those files going back for 31 days.

The CBC obtains its call data from the IP Office via another application, the IP Office Delta Server. This can be on the same PC or on a separate PC.

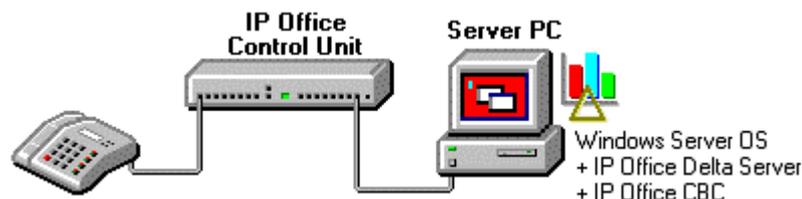
Each IP Office supports only a single Delta Server. However, the Delta Server is able to share that IP Office's call data with up to 80 simultaneous client applications.

CBC is a licensed application, and requires a license in the IP Office configuration for each copy of CBC being run.

The schematic below shows the IP Office Delta Server and CBC on separate PC's.

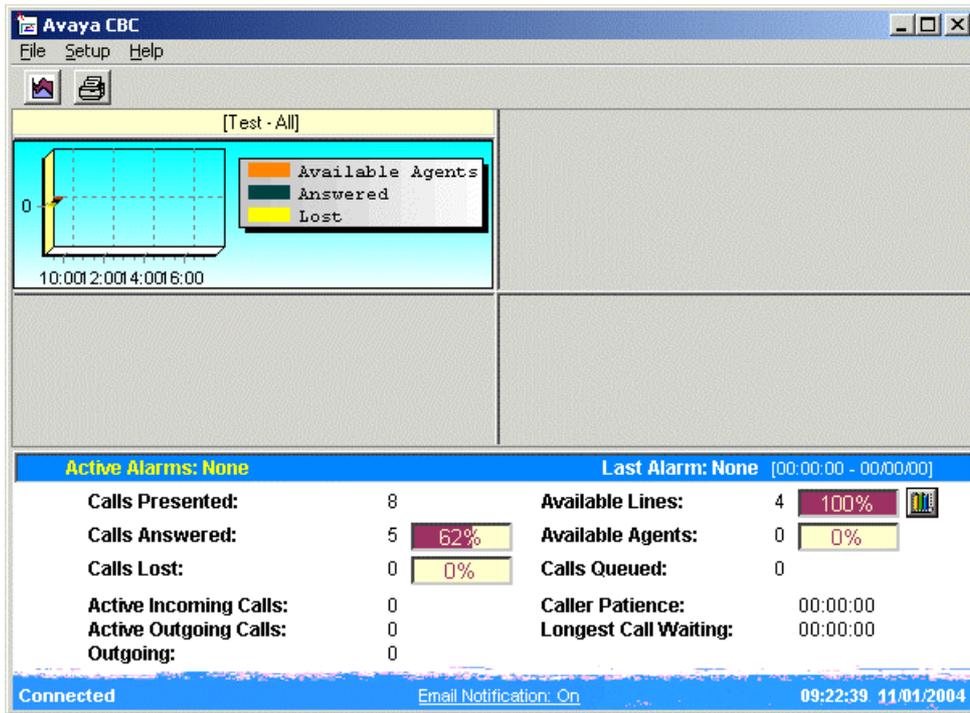


This schematic shows the IP Office Delta Server and CBC on the same PC.



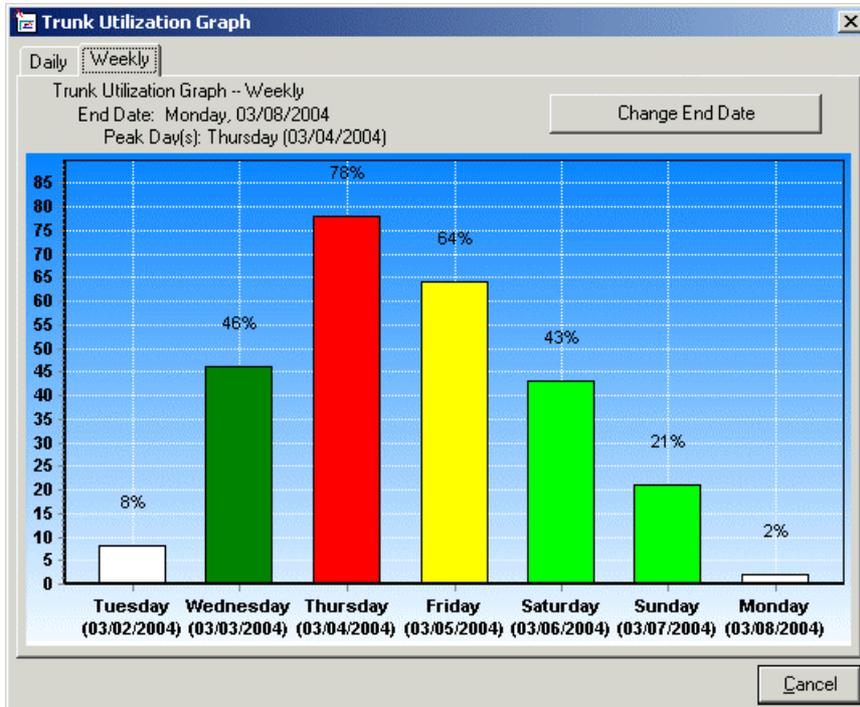
# The CBC Screen

The CBC screen can display up to 4 charts. Each of these can plot up to 4 data variables for an agent group or the whole system, with each data variable being either real-time for the current day or historical for a selected day in the last 31 days.



The base of the screen shows a number of key performance indicators for the whole IP Office system. For more details of these see Key Performance Indicators.

In addition the CBC can display a Trunk Utilization Graph, see Trunk Utilization Graph.



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# Installation

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## CBC Installation Requirements

- **IP Office Administrator Applications CD**  
Contains the CBC software and, if necessary, the Delta Server and Feature Key Server software.
- **IP Office Feature Key**  
CBC is a licensed application. It requires the IP Office to have a Feature key installed.
- **CBC License**  
One license is required for each copy of CBC that will be run. The licenses are unique to the serial number of the Feature Key being used.

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## PC Requirements

The Delta Server and CBC can be installed on either the same PC or on separate PC's. In both cases the following is the minimum recommended PC specification.

### Operating System

- Windows 2000 Server or Professional with SP2
- Windows XP Professional.
- Windows 2003.

### Minimum Recommended PC Specification

This specification may need to be changed to reflect the operating system being used.

- Pentium III 500MHz or higher.
- 10GB free hard disk space.
- Minimum 256MB RAM.

### Network Requirements

- The Delta Server PC should be on the same network segment as the IP Office system, ie. not connected to the IP Office via any intermediate router or remote connection.
- The PC should have an IP address on the same subnet as the IP Office system. A fixed IP address is recommended.
- Connection via LAN2 is not supported. The Delta Server should be connected via LAN1 of the IP Office.

### Additional Requirements

- Microsoft Internet Explorer 5.5 or higher.

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## Email Notification

The CBC can send email notification of alarms to up to two specified email addresses. This uses MAPI and requires the CBC PC to have a MAPI compliant email application installed and configured for MAPI operation.

The CBC must be running under the same user account as configured for the above MAPI operation.

## Entering the CBC License

CBC is a licensed application, with one license required per copy of CBC being run. License are entered into the IP Office configuration and are unique to the serial number of the systems Feature Key.

Feature keys are available in parallel port, USB port and serial port forms. The serial port version plugs directly into the control unit of IP Office Small Office Edition, IP406 V2 and IP412 systems. The parallel port and USB port versions plug into a PC that is connected to the IP Office LAN.

This section assumes that an IP Office feature key has already been installed.

- For a parallel port or USB port feature Key:
  - The Feature Key Server application must be installed on the same PC as the feature key is inserted. This application is found on the IP Office Administrator Applications CD.
  - It is recommended that the Feature Key Server PC is given a fixed IP address. That address should then be entered as the **License Server IP Address** in the IP Office configuration (found on the **System | System** tab).
- For a serial port feature key:
  - The serial port feature key plugs directly into the 9-pin serial port of the control unit.
  - The License Server IP Address in the IP Office configuration (found on the **System | System** tab) should be set to be blank.

### Entering the CBC License

1. Have the license ready, preferably in an electronic form that can be cut and pasted into the configuration.
2. Start IP Office Manager and click  to load the IP Office configuration.
3. In the left-hand panel, click  **License**.
4. Double-click on the right-hand panel.
5. Enter the CBC license key and click **OK**. It should appear as **Compact Business Center** with a **Status** of **Unknown**.
6. Click  the configuration back to the IP Office.
7. Click  and reload the IP Office configuration.
8. Check that the license's **Status** is now **Valid**.
9. Proceed to Installing the Delta Server.

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## Installing Delta Server

These instructions cover installation of the IP Office Delta Server onto a networked PC from the IP Office Administrator Applications CD.

1. Insert the IP Office Administrator Applications CD into the CD Drive.
2. The CD should auto-start and display an Chose Setup Language dialog. Click **Cancel** to close the automatic installation.
3. Select **My computer** or **Windows Explorer**.
4. Right click on the drive containing the CD and select **Open** or **Explore**.
5. Open the **CBC** folder. This should contain two sub-folders, one for CBC itself and one for Delta Server.
6. Open the **Delta Server** folder.
7. Double click **setup.exe**.
8. Select the language for the installation and click **OK**.
9. The Delta Server Installshield Wizard is then started.
10. At the Welcome screen click **Next** to continue.
11. At the completed installation screen, click **Finish**.
12. The IP Office Delta Server is now installed to run as a Windows Service on the PC. Following initial installation the service is not started until either the PC is restarted or the service is started manually, see Starting the Delta Server Service.

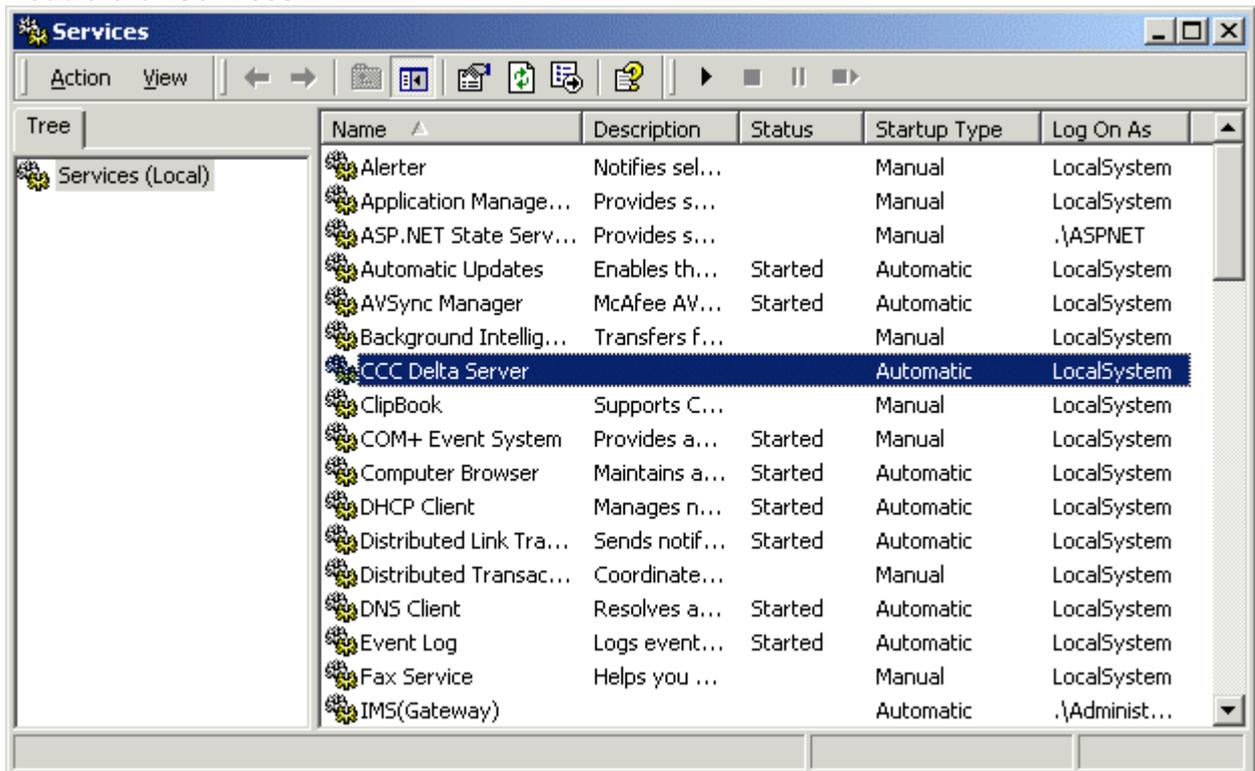
## Starting the Delta Server Service

The IP Office Delta Server is installed to run as a Windows Service called **CCC Delta Server**. It can be stopped and started through the standard **Services** element of the Windows Control Panel.

Following normal installation, the service is installed but not started. The service is set to start automatically following a PC restart, however it can also be started manually.

To start or stop the CCC Delta Server service:

1. Click **Start**.
2. Select **Settings** and click **Control Panel**.
3. Double-click **Administrative Tools**.
4. Double-click **Services**.

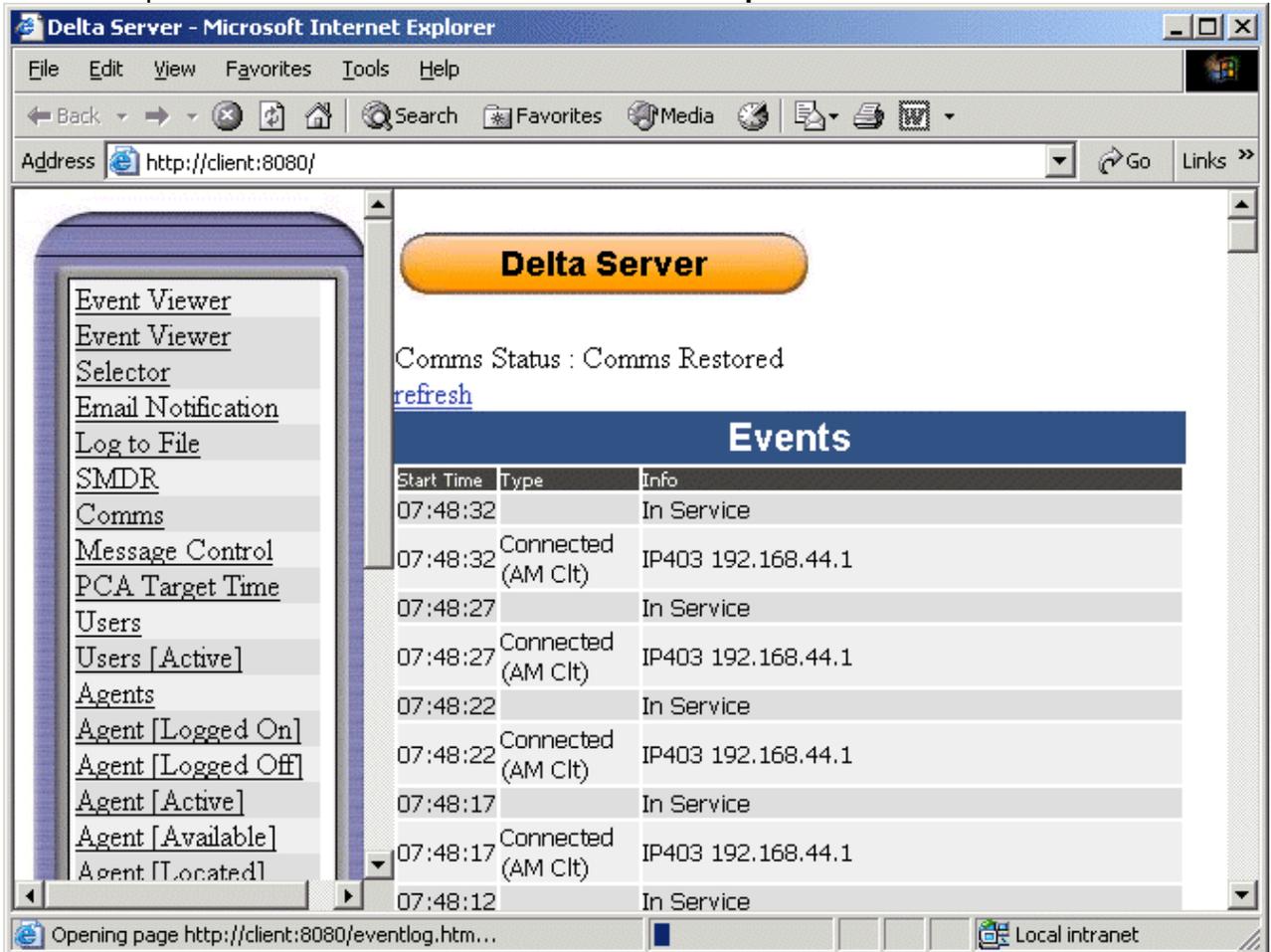


5. Click on the **CCC Delta Server** service to select it.
6. Click on the ▶ icon to start the service. A dialog should appear reporting that Windows is attempting to start the service. If successful the service status will change to **Started**.
7. The **Service** panel can be used to start, stop and configure the CCC Delta Server service as standard for any Windows services.
8. Close the **Service** panel and if necessary the Windows **Control Panel**.
9. If this is the first time the **CCC Delta Server** service has been started, proceed to Accessing the Delta Server.

## Accessing the Delta Server

The Delta Server runs as a Windows service which is started/stopped through the Service option of the Windows Control Panel. However to configure and manage the Delta Service, it is accessed through a web browser interface.

1. Click **Start**.
2. Select **Programs | CCC**.
3. Click **Delta Server**.
4. Internet Explorer should start and access the address **http://client:8080**.



5. If the Delta Server has just been installed, you need to configure with which IP Office system it communicates. Proceed to Comms (IP Office) Configuration.

## Problems Accessing the Delta Server

If you encounter problems connecting to the IP Office SMDR (Delta Server) using Internet Explorer. You may need to enable Bypass proxy for local addresses. To enable this option:

1. In Internet Explorer Select **Tools | Internet Options...**
2. Select the **Connections** Tab
3. Click **LAN Settings**
4. In the Proxy server part of the window check **Bypass proxy for local addresses**.

# Comms (IP Office) Configuration

The Delta Server Comms screen is used to set with IP Office the Delta Server communicates.

1. Access the Delta Server using **Start | Programs | CCC | Delta Server**.
2. In the left-hand panel click **Comms**.



3. Select the required IP Office system from the **Connection** drop-down.
4. If the require system is not listed, enter its IP address in the **Search** box and click **Search**.
  - The Multimedia options relate to IP Office CCC installation and are not covered here.
5. Once the correct system is selected, click **Apply**.
6. Proceed to Installing the CBC Software.

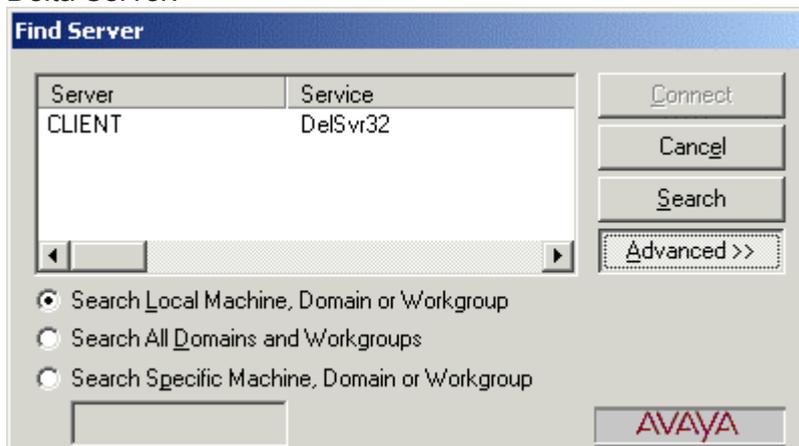
Note: If the IP Office name or IP address is changed, it is essential to reconnect the IP Office SMDR.

## Installing the CBC Software

1. Insert the IP Office Administrator Applications CD into the CD Drive.
2. The CD should auto-start and display an Chose Setup Language dialog. Click **Cancel** to close the automatic installation.
3. Select **My computer** or **Windows Explorer**.
4. Right click on the drive containing the CD and select **Open** or **Explore**.
5. Open the **CBC** folder. This should contain two sub-folders, one for CBC itself and one for Delta Server.
6. Open the **CBC** sub-folder (the sub-folder may be labeled with the CBC version).
7. Double click **setup.exe**.
8. Chose the required installation language and click **OK**.
9. The InstallShield Wizard will start. Click **Next**.
10. The software will now start being installed. When completed click **Finish**.
11. The CBC is not configured to auto-start. Data is not collected for periods when CBC is not running. Therefore it is recommend that you copy the CBC program shortcut (**Start | Programs | CCC | CBC**) to the Startup folder (**Start | Programs | Startup**).
12. Proceed to Starting CBC (First Time).

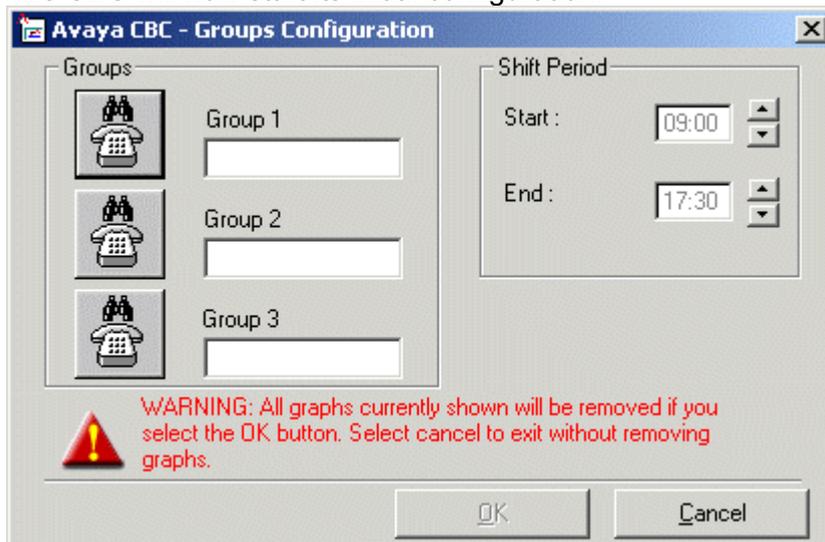
## Starting CBC (First Time)

1. Click **Start**.
2. Select **Programs** and then **CCC**.
3. Click **CBC**.
4. As this is the first time CBC has been started, it will perform a network search for the IP Office Delta Server.

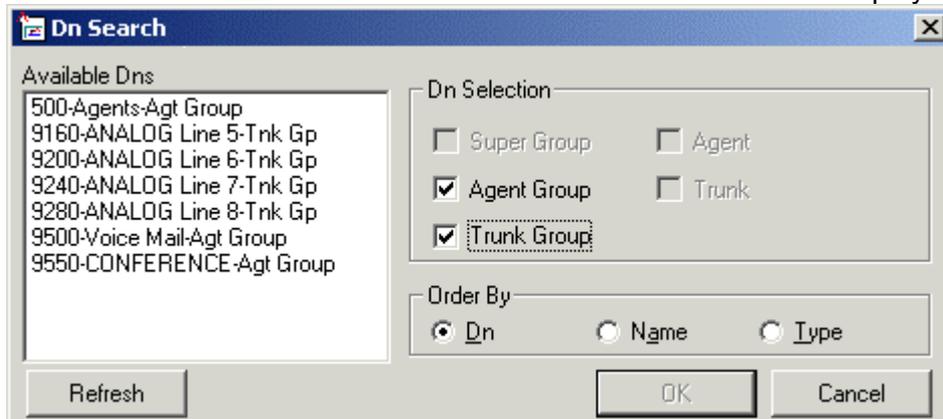


5. The name of the PC running the Delta Server should appear in the list. Click the name to select it and then click **Connect**.

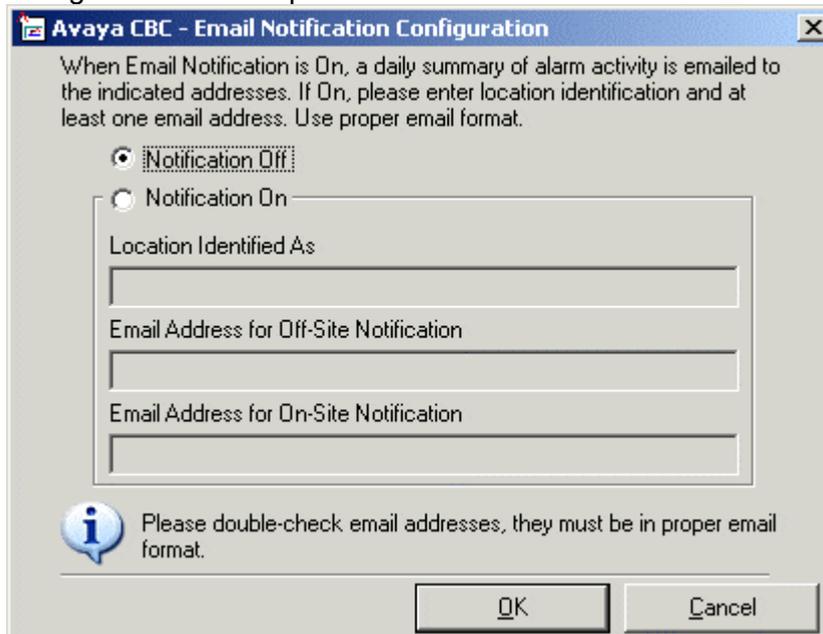
- The CBC will now start its initial configuration.



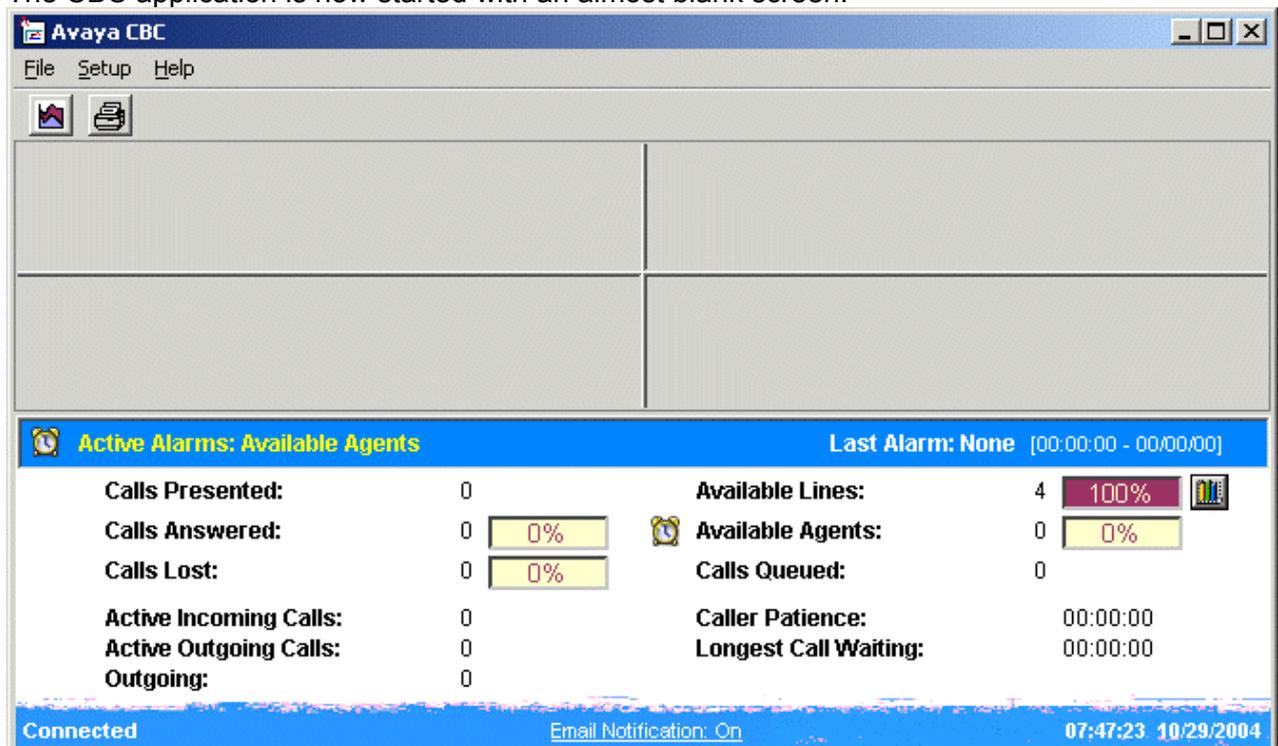
- Click on the first  button. The **Dn Search** windows menu is displayed.



8. Use this to select the group required and then click on **OK**. Selecting a shift time limits the period during which alarms may occur.
9. Repeat for the other groups, then click **OK**.
10. An configuration menu for email notification is displayed. This requires that the CBC PC has a configured MAPI compliant email client such as Outlook.



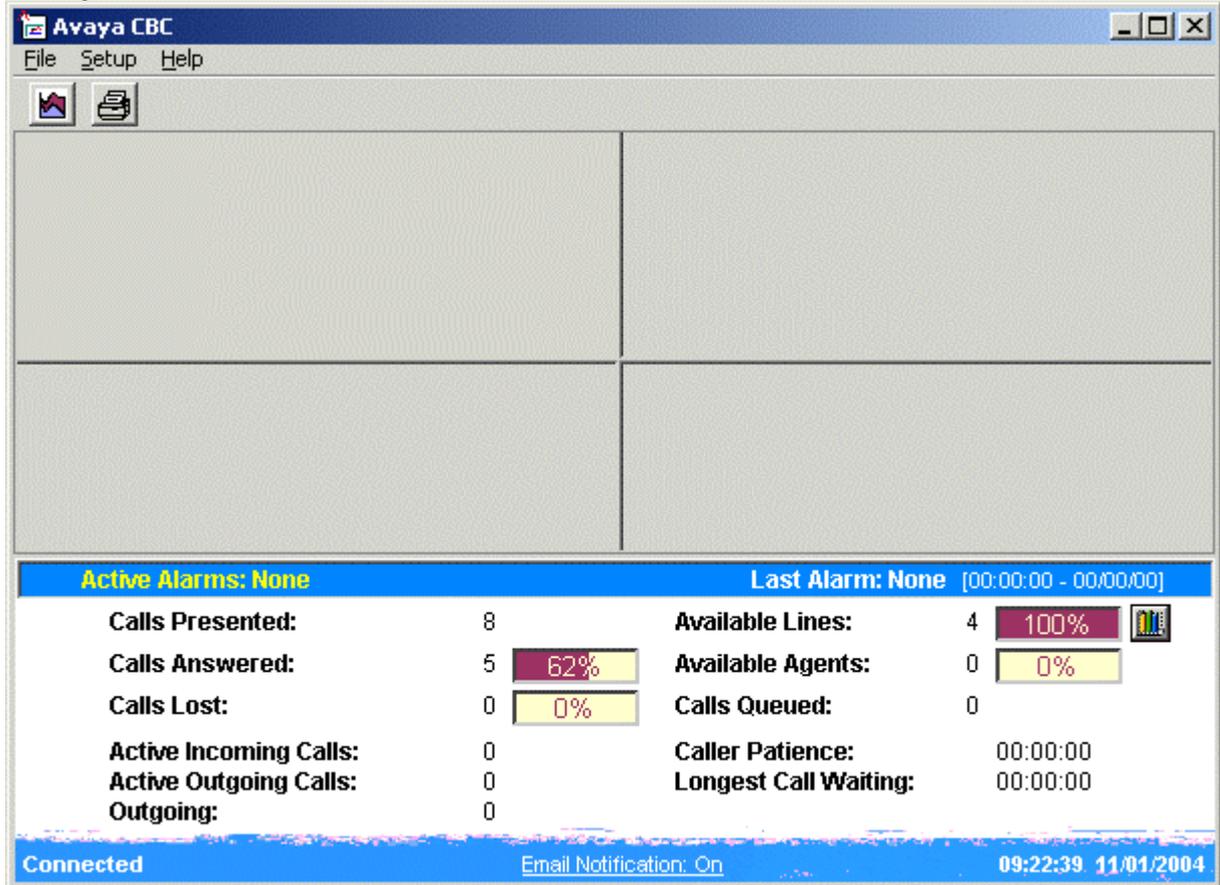
11. Click **OK**.
12. The CBC application is now started with an almost blank screen.



13. Proceed to Creating Charts.

# Creating Charts

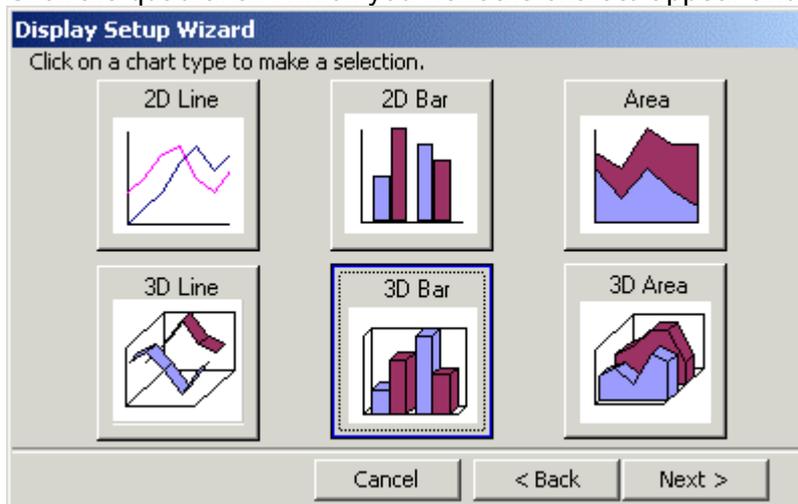
- Initially CBC starts with four blank chart areas.



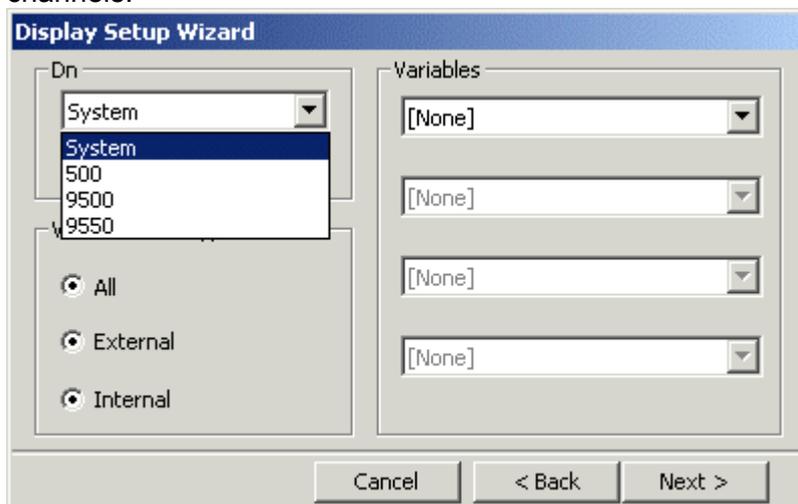
- Click  or right-click on the chart area and select **New Chart**. This starts the **Display Setup Wizard**.



- Click the quadrant in which you want the chart to appear and click **Next>**.



- Select the chart type from 2D line, 2D bar, Area, 3D line, 3D bar and 3D area. Then click **Next>**.
- Select the **Dn** (directory number) that you want to report on. The drop down list will include only those supported by CBC, ie. groups with login agents, line, voicemail trunks and conference channels.

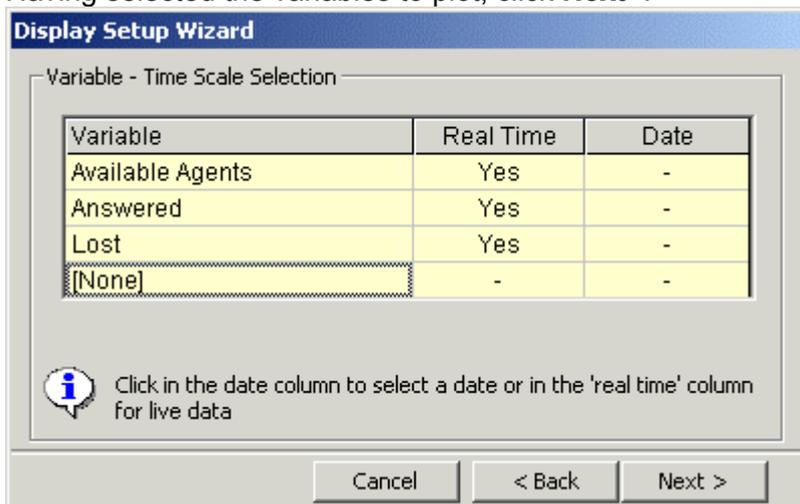


- Select the data variables and the data type (internal, external or all) that you want plotted for the selected DN. You can select up to 4 variables.



- Presented:** The total number of calls presented.
- Answered:** The total number of calls presented and answered.
- Lost:** The number of total calls presented or queued but not answered.
- Outgoing:** The total number of outgoing attempts including internally made calls.
- Available Agents:** The number of available agents that are logged on.
- Available Lines:** The total number of free lines and busy lines in use i.e. trunk utilization.
- Calls Waiting:** The number of calls alerting a device.
- Active I/C Calls:** The number of calls currently in progress across the entire system.
- Active O/G Calls:** The number of calls currently in progress across the entire system.
- Queued:** The number of calls being queued. This does not include calls alerting a device.
- Caller Patience:** The average time the an ACD call was in queue before lost. (Only Available if the **Variable Data Type** is set to **External**).

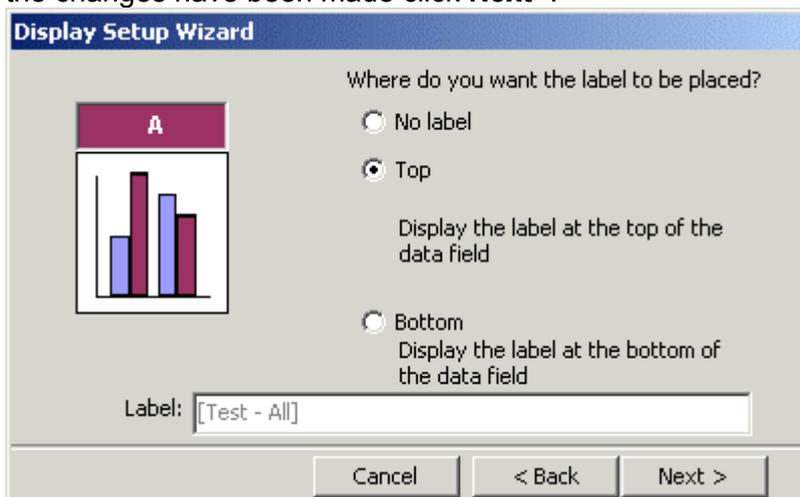
- Having selected the variables to plot, click **Next>**.



8. This step of the wizard allows you to select to view either historical data or real time information.
- To view historical data for a variable, click on the date field and select a date from the calendar. This can be any day in the last 31 days.
  - To view real time data for a variable, click on the Real Time field.
9. Click **Next>**.

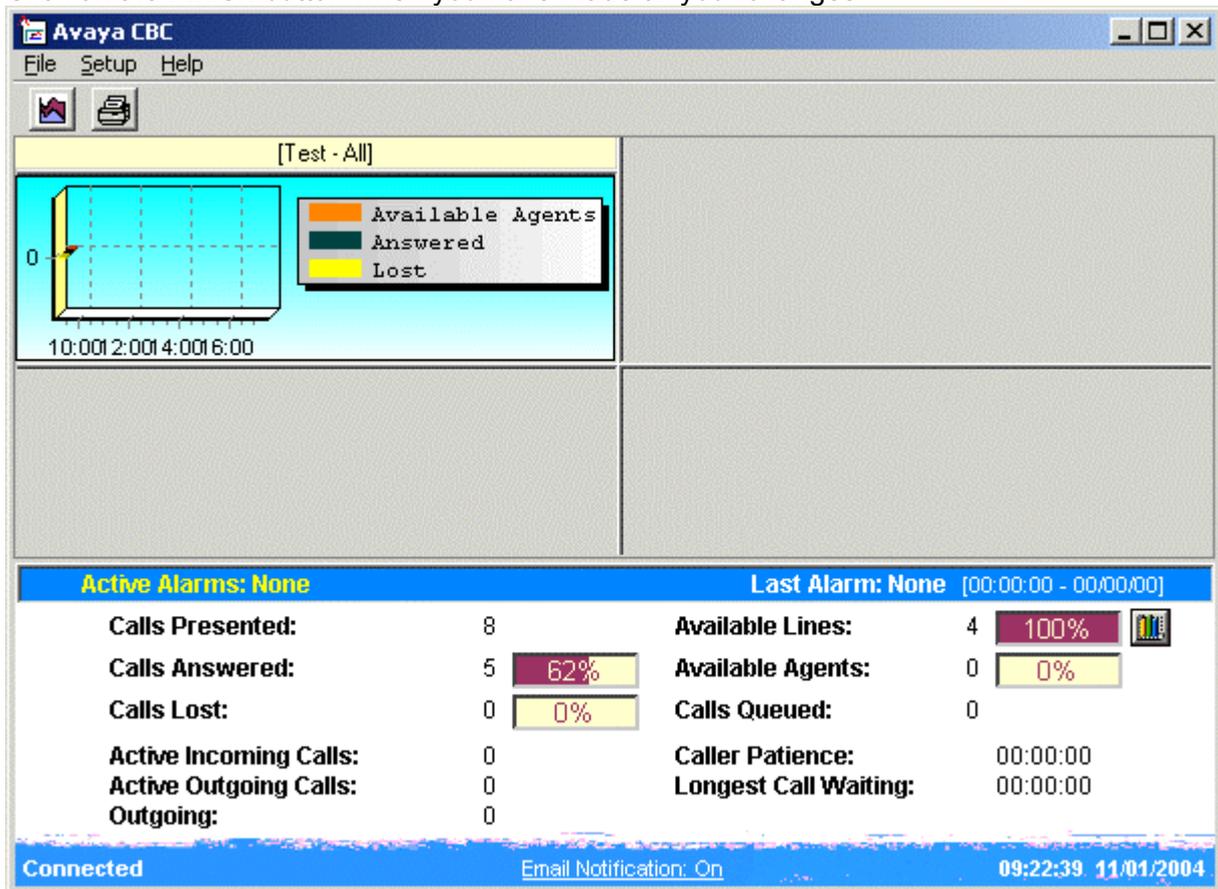


10. This step of the wizard allows you to assign colors to various parts of the plotted graph. When all the changes have been made click **Next>**.



11. The final step of the wizard allows you to choose whether you want to show a label or not.

12. Click on the **Finish** button when you have made all your changes.



To make changes to the chart, right-click on it and select **Edit Chart**.

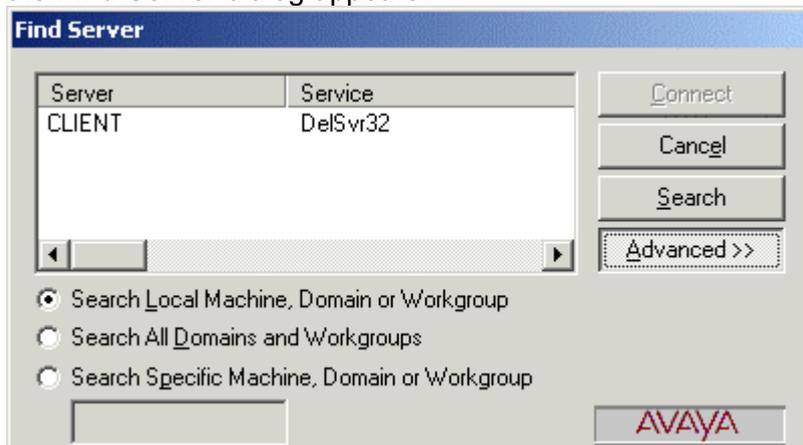
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# Using CBC

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## Starting CBC (Normal)

1. Click **Start** and select **Programs**.
2. Select **CCC** and click on **CBC**.
3. If **Reconnect to last known Delta Server** is checked, the CBC will attempt this and then run as previously configured.
4. If the Delta Server could not be found or **Reconnect to last known Delta Server** was unchecked, the **Find Server** dialog appears.



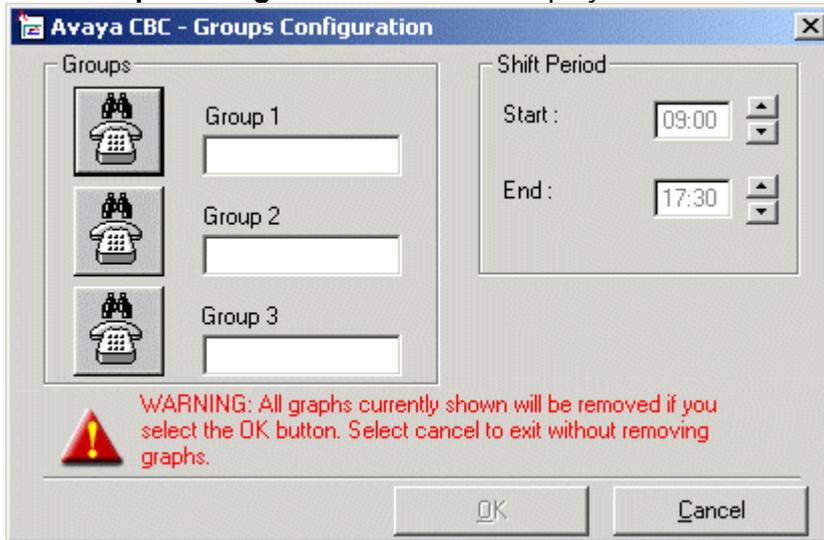
5. Use this to locate the name of the PC running the Delta Server. Select that name when shown and click **Connect**.

## Change the Selected Groups

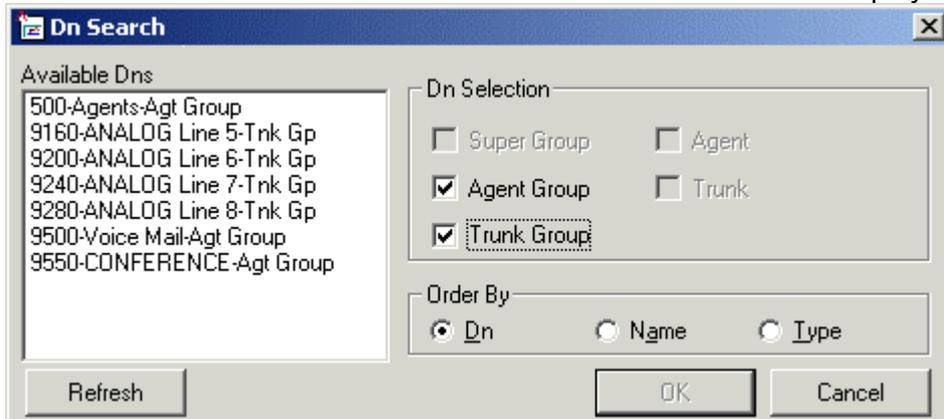
The CBC can record and display data for up to 3 agent hunt groups. These groups are selected when the CBC is connected to a particular IP Office for the first time.

You can change the selected groups if necessary. Note however that doing this will cause the loss of all existing data and chart settings.

1. **WARNING:** All original data will be lost when you change the Groups Configuration.
2. From the **File** menu, select **Groups**.
3. The **Groups Configuration** Screen is displayed.



3. Click on the first  button. The **Dn Search** windows menu is displayed.



4. Enter the shift period.
5. Click the **OK** button.
6. Repeat for the other groups and then click **OK**.

## Key Performance Indicators

The bottom of the CBC screen shows a range of 'key performance indicators' for the system. These are either current figures or cumulative for the current day.

These details are updated every 10 seconds.

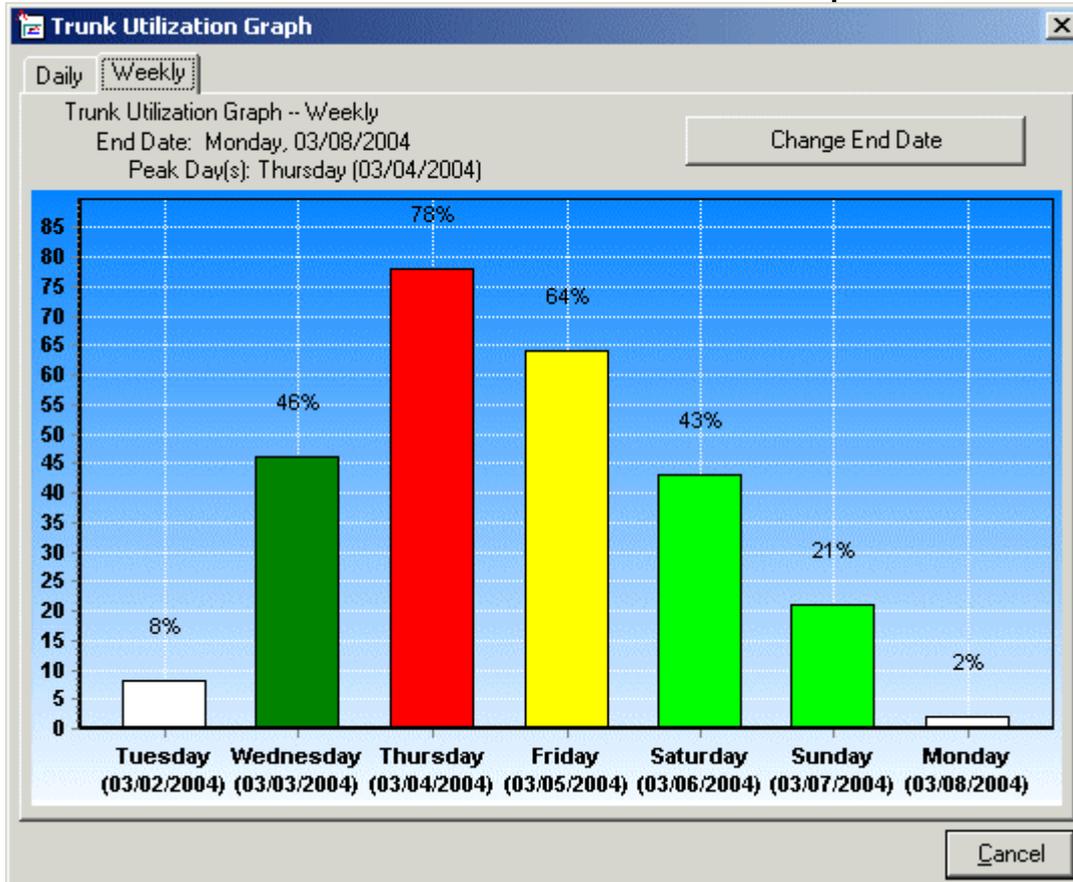
Active Alarms: None		Last Alarm: None [00:00:00 - 00:00:00]	
Calls Presented:	0	Available Lines:	12 <span style="background-color: #800000; color: white; padding: 2px;">100%</span> 
Calls Answered:	0 <span style="background-color: #ffff00; padding: 2px;">0%</span>	Available Agents:	4 <span style="background-color: #800000; color: white; padding: 2px;">44%</span>
Calls Lost:	0 <span style="background-color: #ffff00; padding: 2px;">0%</span>	Calls Queued:	0
Active Incoming Calls:	0	Caller Patience:	00:00:00
Active Outgoing Calls:	0	Longest Call Waiting:	00:00:00
Outgoing:	0		
Connected		Email Notification: Off	
		10:03:08 03/11/2004	

- **Active Alarms**  
Shows if any alarms are currently active. If a single alarm is active, its name is shown. If several alarms are active, **Multiple** is shown. See Alarms for further details.
- **Last Alarm**  
Shows the last alarm and when it occurred.
- **Calls Presented**  
The number of calls presented both internally and externally.
- **Calls Answered**  
The total number of calls that answered. The percentage figure is the percentage of calls answered against calls presented.
- **Calls Lost**  
The total number of calls lost. The percentage figure is the percentage of calls lost against calls presented.
- **Active Incoming Calls**  
The number of incoming calls currently in progress.
- **Active Outgoing Calls**  
The number of outgoing calls currently in progress. Note that internal calls are also seen as outgoing.
- **Outgoing**  
The total number of calls made during the day.
- **Calls Queued**  
The total number of calls in a queue, which are not ringing on a phone (both internal and external).
- **Available Lines**  
The total number of free and busy lines available. i.e. trunk utilization. The percentage figure shows the percentage of total lines in comparison to the available lines.
- **Available Agents**  
This shows the number of agents logged on. The percentage figure shows the number of agents in a ready state as a percentage of all agents on the telephone switch.
- **Caller Patience**  
The average waiting time by a caller at the point when the call was lost.
- **Longest Call Waiting**  
The duration of the longest active call waiting.

## Trunk Utilization Graph

The trunk utilization graph displays the trunk utilization for the IP Office. The trunk utilization graph can be opened in a number of ways:

1. Click the  icon or select **File** and then **Trunk Utilization Graphs**.



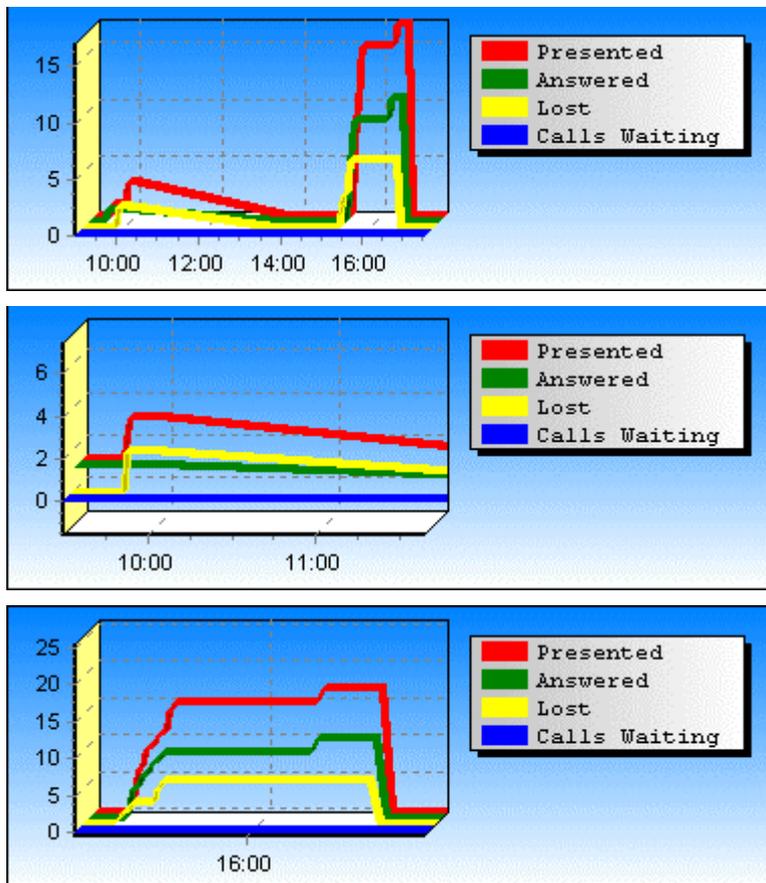
2. Select either **Daily** or **Weekly**.
3. When opened, the graphs always default to the current day. You can select to view a particular end date. Click **Change End Date** and select the date required.
4. The trunk utilization graph shows the trunk utilization of all lines (except IP) on the IP Office system. The different colors of the chart indicate the level of trunk utilization.
  - **White** = Up to 20% utilization.
  - **Light Green** = Up to 45% utilization.
  - **Dark green** = Up to 60% utilization.
  - **Yellow** = Up to 75% utilization.
  - **Red** = Over 75% utilization.
5. To close the graph click **Cancel**.

## Zooming Into Charts

When viewing charts on the user interface you can zoom into the chart. To zoom into a particular section of the chart:

1. Drag your mouse over the chart whilst holding the left mouse button down, so that a square appears.
2. When you let go of the mouse button, the chart will zoom into the area selected.

The charts below show an example of gradually zooming in to an area of the chart.



To expand the view make your selection beyond the edge of the charts (all four charts). When you let go of the mouse button, the whole shift time period will show.

## Amending Charts

If you want to change an existing chart:

1. Right-click on the chart.
2. Select **Edit Chart**.
3. The Display Setup Wizard is rerun. See Creating Charts.

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## Deleting Charts

To delete an existing chart:

1. Right-mouse the existing chart.
2. Select **Remove Chart**.

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## CBC Alarms

The CBC provides a number of pre-defined alarms. The alarms will notify the business of issues which may require action.

The following pre-defined alarms are available:

- **Lost Call Alarm**  
This alarm is triggered when the percentage of lost calls exceeds 10% of the calls presented. The alarm is reset when the percentage returns to less than or equal to 9%.
- **Trunk Utilization Alarm**  
This alarm is triggered when the percentage trunk utilization exceeds 75% of the total available trunks. The alarm is reset when the percentage returns to less than 70%.
- **Calls Queued Alarm**  
This alarm is triggered when the number of calls queued is greater than 4. The alarm is reset when the number of calls queued is less than 4.
- **Available Agents Alarm**  
This alarm is triggered when the percentage of available agents is less than 10% of the total logged in agents. The alarm is reset when the percentage returns to greater or equal to 11%.

**Note:** Alarms will not be triggered until one minute has elapsed after the CBC has been started.

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## Alarm Notification

When an alarm is triggered the CBC can notify you of the alarm in a number of ways:

- In the CBC charts, if a variable being plotted has exceeded its alarm value, a {!} is shown next to its name in the chart legend.
- The Key Performance Indicators area of the CBC screen will indicate the alarm name and when it occurred.
- An Alarm icon  is shown against the Key Performance Indicator that is alarming.
- If email notification is on, the daily email will include details of the alarm. See Email Notification.

## Email Notification

Email notification enables a summary of CBC alarms to be sent to two specified email addresses at the end of each day. The current status of email notification is shown at the bottom of the CBC screen.

To activate email notification

1. Click **File** and then **Email Notification**.

2. Select **Notification On**
3. Enter a name for the system in **Location Identified As**. This must be completed.
4. At least one of the following two email addresses must be completed. The addresses used must be fully qualified internet email addresses.
5. Click **Finish**

A sample email is shown below...

Dear user1@test.avaya.com,

Your Avaya(TM) Compact Business Center located at Site One CBC has reported the alarms listed below. Please refer to the individual alarm listing for a suggestion on corrective action.

---

Alarm: Lost

Time: 08:59:10

Date: 03/17/2004

Suggested Action:

For your business, the rate of customers who abandon while waiting to be helped is high. Are your peak hours staffed correctly?

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# Index

- 1**
  - 11
    - equal 26
  - 128MB RAM 7
- 2**
  - 2D 16
  - 2D bar 16
  - 2GB Free Disk Space 7
- 3**
  - 3D 16
  - 3D bar 16
- 9**
  - 9-pin 8
- A**
  - Accessing
    - Delta Server 11, 12
  - Accessing 11, 12
  - ACD 16
  - Active Alarms 23
  - Active I/C Calls 16
  - Active Incoming Calls 23
  - Active O/G Calls 16
  - Active Outgoing Calls 23
  - Agent Group 13
  - Alarm icon 26
  - Alarm Notification 26
  - Amending
    - Charts 26
  - Amending 26
  - Apply 12
  - Area 16
  - Assigning
    - PC 11
  - Assigning 11
  - Available Agents 16, 23
  - Available Agents Alarm 26
  - Available Lines 16, 23
  - Avaya 27
- B**
  - Back
    - IP Office 8
  - Back 8
  - Browseable 11
  - Bypass 11
- C**
  - Caller Patience 16, 23
  - Calls Answered 23
  - Calls Lost 23
  - Calls Presented 23
  - Calls Queued Alarm 26
  - Calls Waiting 16
  - Cancel 9, 13, 24
  - CBC
    - Contains 7
      - copy 5, 7, 8, 13
    - Enter 8
    - Open 9, 13
    - Starting 13, 21
  - CBC 5, 6, 7, 8, 9, 13, 16, 21, 22, 23, 26, 27
  - CBC Alarms 26
  - CBC application 13
  - CBC Installation Requirements 7
  - CBC License
    - Entering 8
  - CBC License 7, 8
  - CBC Overview 5
  - CBC PC
    - requires 7
  - CBC PC 7, 13
  - CBC Screen 6
  - CBC Software
    - Installing 13
  - CBC Software 13
  - CCC 11, 12, 13
  - CCC Delta Server
    - stop 10
  - CCC Delta Server 10
  - CD
    - containing 9, 13
  - CD 9, 13
  - CD Drive 9, 13
  - Change
    - Groups 22
    - Selected Groups 22
    - Started 10
  - Change 10, 22
  - Change End Date 24
  - Charts
    - Amending 26
    - Creating 16
    - Deleting 26
  - Charts 16, 26
  - Chose Setup Language dialog
    - display 9, 13
  - Chose Setup Language dialog 9, 13
  - Close
    - Service 10
  - Close 10
  - Comms 12
  - Compact Business Center 8, 27
  - Conference Agent Group 13
  - Connecting
    - IP Office SMDR 11
  - Connecting 11, 13, 21
  - Connection 12
  - Connections Tab
    - Select 11
  - Connections Tab 11
  - Containing
    - CBC 7
    - CD 9, 13
  - Containing 7, 9, 13
  - Control Panel 10
  - Copy
    - CBC 5, 7, 8, 13
  - Copy 5, 7, 8, 13
  - Creating
    - Charts 16
  - Creating 16
  - CSV file
    - minute 5
  - CSV file 5
- D**
  - Daily 24
  - Dear user1@test.avaya.com 27
  - Deleting
    - Charts 26
  - Deleting 26
  - Delta Server
    - Access 12
    - Accessing 11
    - Installing 9
    - IP Office 12
    - Open 9
    - Problems
      - Accessing 11
    - Delta Server 5, 7, 9, 11, 12, 13, 21
  - Delta Server Comms 12
  - Delta Server Installshield Wizard 9
  - Delta Server Service
    - Starting 10
  - Delta Server Service 10
  - Delta Service
    - manage 11
  - Delta Service 11
  - Display
    - Chose Setup Language dialog 9, 13
  - Trunk Utilization Graph 6
  - Display 6, 9, 13
  - Display Setup Wizard
    - starts 16
  - Display Setup Wizard 16, 26
  - Dn
    - Select 16
  - Dn 16
  - Dn Search 13, 22
  - Double-click Administrative Tools 10
  - Double-click Services 10
- E**
  - Edit Chart 16
  - Email 7, 13, 26, 27
  - Email application 7
  - Email Notification 7
  - Email Notification 27
  - Entering
    - CBC 8
    - CBC License 8
  - Entering 8
  - Equal
    - 11 26
  - Equal 26
  - Explore 9, 13
  - External
    - set 16
  - External 16
- F**
  - Feature Key
    - number 7
  - Feature Key 7, 8
  - Feature Key Server 7
  - Feature Key Server application 8
  - Feature Key Server PC 8
  - File menu 22
  - Find Server dialog 21
  - Finish 9, 13, 27
  - Finish button 16
  - Firewalls 11
  - First Time 13
  - Following
    - Operating Systems 7
    - PC 10
  - Following 7, 10
- G**
  - Groups
    - change 22

- Groups 22
- Groups
- Configuration
- Screen 22
- H**
- Hard Disk Drive 7
- I**
- le 16
- Including
  - Trunk Utilization Graph 26
- Including 26
- Initially CBC 16
- Insert
  - IP Office Administrator Applications CD 9, 13
- Insert 9, 13
- Installing
  - CBC Software 13
  - Delta Server 9
- Installing 9, 13
- InstallShield Wizard 13
- Internet email 27
- Internet Explorer 11
- Internet Explorer Select Tools 11
- Internet Options 11
- Into Charts
  - Zooming 25
- Into Charts 25
- IP 8, 12, 24
- IP Office
  - back 8
  - Delta Server 12 requires 7
- IP Office 5, 6, 7, 8, 11, 12, 13, 22, 24
- IP Office Administrator Applications CD
  - Insert 9, 13
- IP Office Administrator Applications CD 7, 8, 9, 13
- IP Office CCC relate 12
- IP Office CCC 12
- IP Office Compact Business Center 5
- IP Office Delta Server
  - shows 5
- IP Office Delta Server 5, 9, 10, 13
- IP Office Feature Key 7
- IP Office LAN 8
- IP Office Small Office Edition 8
- IP Office SMDR connecting 11
- IP Office SMDR 11, 12
- IP406 V2 8
- IP412 8
- K**
- Key Performance Indicators 26
- L**
- LAN
  - PC's 11
- LAN 11
- LAN Settings 11
- Last Alarm 23
- License 8
- License Server IP Address 8
- Light Green 24
- Location Identified As 27
- Login 13, 16
- Longest Call Waiting 23
- Lost Call Alarm 26
- M**
- Manage
  - Delta Service 11
- Manage 11
- MAPI 7, 13
- Minute
  - CSV file 5
- Minute 5
- Multimedia 12
- Multiple 23
- N**
- Name
  - PC 13
- Name 13
- Network Administrator 11
- New Chart 16
- Next 9, 13, 16
- Number
  - Feature Key 7
- Number 7
- O**
- OK 8, 9, 13, 22
- OK button 22
- Only Available 16
- Open
  - CBC 9, 13
  - Delta Server 9
- Open 9, 13
- Operating System 7
- Operating 7
- Operating Systems following 7
- Operating Systems 7
- Outlook 13
- P**
- PC
  - assigning 11
  - following 10
  - name 13
  - Windows Service 9
- PC 5, 7, 8, 9, 10, 11, 13, 21
- PC Requirements 7
- PC's
  - LAN 11
- PC's 5, 7, 11
- Pentium II 400 MHz 7
- Performance Indicators 23
- Problems Accessing Delta Server 11
- Problems Accessing 11
- Programs 12, 21
- Proxy 11
- R**
- Real Time 16
- Reconnect 21
- Red 26
- Relate
  - IP Office CCC 12
- Relate 12
- Remote Access 11
- Requires
  - CBC PC 7
  - IP Office 7
- Requires 7
- S**
- Search 12
- Select
  - Connections Tab 11
  - Dn 16
- Select 11, 16
- Select CCC 21
- Select Edit Chart 26
- Select My 9, 13
- Select Notification On 27
- Select Programs 11, 13
- Select Remove Chart 26
- Select Settings 10
- Selected Groups
  - Change 22
- Selected Groups 22
- Server 7
- Service
  - Close 10
- Service 10, 11
- Set
  - External 16
- Set 16
- Setup.exe 9, 13
- Shows
  - IP Office Delta Server 5
- Shows 5
- Site One CBC 27
- Start
  - CBC 13, 21
  - change 10
  - Delta Server Service 10
  - Display Setup Wizard 16
- Start 10, 11, 12, 13, 16, 21
- Start | Programs 13
- Start IP Office Manager 8
- Started/stopped 11
- Startup 13
- Status
  - Unknown 8
- Status 8
- Stop
  - CCC Delta Server 10
- Stop 10
- Suggested Action 27
- System
  - Operating 7
- System 7, 8
- T**
- TM 27
- Trunk Utilization Alarm 26
- Trunk Utilization Graph
  - display 6
  - including 26
- Trunk Utilization Graph 6, 24, 26
- U**
- Unknown
  - Status 8
- Unknown 8
- USB 8
- V**
- Valid 8
- Variable Data Type 16
- Voicemail 16
- Voicemail Agent Group 13
- W**
- WARNING 22
- Weekly 24
- Welcome 9
- Windows 10, 11

Windows Control  
Panel 10, 11  
Windows Explorer  
9, 13

Windows NT/2000 7  
Windows Service  
PC 9

Windows Service 9,  
10  
**X**  
XP Professional 7

**Z**  
Zooming  
    Into Charts 25  
Zooming 25

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