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# Nortel Networks Symposium Call Center Server

for DMS  
Setup Guide

Product release 5.0

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April 2004

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**NORTEL**  
**NETWORKS™**



# Nortel Networks Symposium Call Center Server

## for DMS Setup Guide

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# Chapter 1

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## Filling in the worksheets

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# Overview

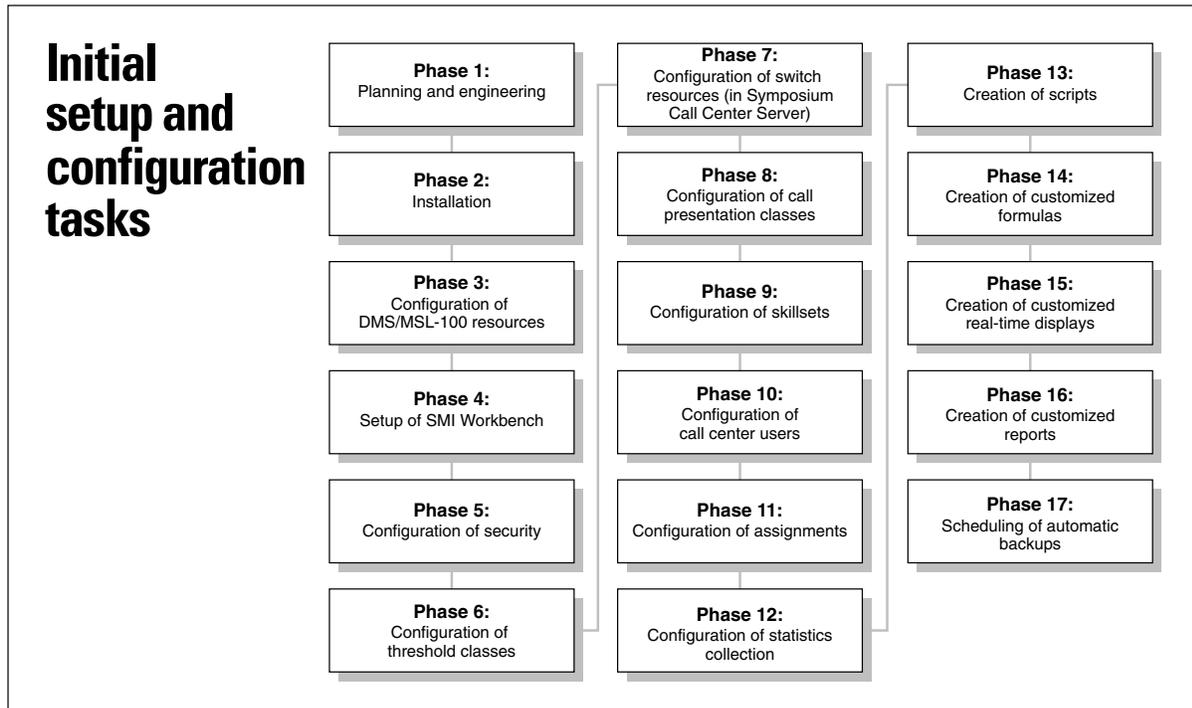
## Introduction

The worksheet package contains worksheets you can use to plan the configuration of your Symposium Call Center Server. The worksheets are provided in two formats: paper and Microsoft Excel spreadsheet. This guide provides instructions for completing the worksheets.

Complete the worksheets in the order in which they are described in this chapter; some worksheets depend on entities defined in earlier worksheets.

## Initial setup and configuration tasks

The following illustration shows the tasks involved in the initial setup and configuration of Symposium Call Center Server:



During Phase 1, plan your call center and select the hardware configuration required to support your call center workload. As part of Phase 1, complete the worksheets in this guide. During Phases 5 to 12, use the information in your worksheets to configure the server.

## Completing the worksheets

During Phase 1, the planning phase, use the worksheets to perform the following planning tasks (the worksheets for these tasks are labeled SCCS01 to SCCS012):

1. **Setting up security.** You must give users access to the server so that they can configure call flows, and manage and monitor the call center. You implement security during Phase 5.
2. **Defining threshold classes.** Threshold classes determine how statistics are treated in reports and real-time displays. When you create agents, skillsets, and applications, you assign them to threshold classes. Therefore, you must define threshold classes before you define any of these other objects. You configure threshold classes during Phase 6.
3. **Administering the switch.** You must define all of the switch resources used by the server (CDNs, DNISs, phonesets, and so on). Some of these resources (CDNs and phonesets) must be defined so that they can be acquired by the server. The others must be defined if you want to be able to report on them. You configure switch resources during Phase 7.
4. **Defining call presentation classes.** Call presentation classes determine how calls are presented to agents. When you create agents, you assign call presentation classes to them. Therefore, you must define call presentation classes before defining agents. You configure call presentation classes during Phase 8.
5. **Defining skillsets.** A skillset is a set of capabilities and knowledge required to answer a certain type of call. When you create agents, you assign them to skillsets. Therefore, you must define skillsets before defining agents. You configure skillsets during Phase 9.
6. **Defining call center users.** You must define agents and assign them to skillsets. You must also define the supervisors who will monitor agent performance. When you create agents, you assign them to supervisors. Therefore, you must define supervisors before defining agents. You configure call center users during Phase 10.
7. **Defining assignments (optional).** To automate the reassignment of agents to skillsets and supervisors, you can define agent to skillset and agent to supervisor assignments. Reassignment can be used to reassign agents for early morning and late evening periods, lunch and coffee breaks, and vacations and sick days. You configure assignments during Phase 11.
8. **Configuring statistics collection.** You must specify the types of statistics to be collected, and (for historical statistics) how long they are stored on the server. You must also specify the applications for which call-by-call statistics are stored. You configure statistics collection during Phase 12.

## Optional features

Some of the features described in this guide are optional. To determine which features you have access to, Nortel Networks supplies a special code called a keycode that you use when you install the Symposium Call Center Server software. Fields and commands for features that you did not purchase are not available.

# Skills you need

## Nortel Networks product knowledge

Knowledge of, or experience with, the following Nortel Networks products is helpful when creating reports for Symposium Call Center Server:

- Symposium Call Center Server
- DMS switch

**Note:** Throughout this guide, the term DMS switch applies to the following switch types:

- DMS switch
- MSL-100 switch
- Succession 2000 switch
- Nortel Networks Communication Server 2100 (CS 2100) switch

## Other experience or knowledge

Other types of experience or knowledge that may be of use include the following:

- knowledge of your call center organizational structure
- knowledge of your call center information requirements

## Section A: Security worksheets

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# Overview of security worksheets

## Planning for security

Before completing the worksheets in this section, perform these tasks:

1. Identify the roles required to administer your system.
2. Determine the privileges required to perform each role.
3. Identify the individuals who will fill each role.

When you have completed these tasks, use the worksheets in this section to do the following:

1. Define an access class with the set of privileges required to perform each role.
2. Define each individual as a desktop user, and assign him or her to the appropriate access class.

## When to configure security

You configure security in Phase 5.

# Completing the Access Classes worksheet

## What are access classes?

An access class is a set of privileges for Symposium Call Center Server functions. For example, you may define an access class called Real-Time View that has view access to real-time displays. You can then give supervisors desktop accounts with this access class, so that they can only view the real-time statistics.

## Where to look for more information

For more information, see the *Administrator's Guide*.

## Default access classes

The installation process creates three default access classes:

- **adminGroup:** Users belonging to this class have administrator access to the system.
- **Call Center Admin:** Users belonging to this class can access all functions except the switch administration functions (such as configuring phonesets and CDNs), and system administration functions (such as backup, restore, and the alarm monitor).
- **Supervisor:** Users belonging to this class can view and change reporting agents, create and run reports, and create and view real-time displays.

## Field descriptions

Complete the following fields on worksheet SCCS01:

### Access Class Name

**Description:** The name of the access class. Use a descriptive name that helps identify the privileges of the access class.

**Format:** Up to 30 characters (no spaces)

### Access

**Description:** Choose the level of access for each Symposium Call Center Server function. The worksheet contains the following codes for access levels:

- N—None
- V—View
- VR—View reporting agents only
- VRE—View and edit reporting agents only
- VO—View own agents only
- VOA—View and assign own agents only
- VOD—View own agents—create displays
- VA—View all agents

- **VAA**—View and assign all agents
- **VAD**—View all agents—create displays
- **VU**—View all users
- **E**—Edit
- **EA**—Edit all agents—create agents only
- **EU**—Edit all users
- **EUC**—Edit all users—create any type
- **C**—Create/Delete
- **CR**—Create and run any report
- **D**—Delete

**Note:** Not all codes apply to all functions.

# Completing the Desktop User Configuration worksheet

## What are desktop users?

A desktop user account is an account that can use the client application to access Symposium Call Center Server. When you create a desktop user account, you assign an access class that gives the user the privileges needed to perform his or her job.

## Where to look for more information

For more information, see the *Administrator's Guide*.

## Before you begin

Complete the Access Classes worksheet, SCCS01.

## Field descriptions

Complete the following fields on worksheet SCCS02:

### User name

**Description:** The user's name, in the format:  
firstname lastname.

### Title

**Description:** The user's job title.

### Department

**Description:** The name of the department to which the user belongs.

### Language

**Description:** The user's preferred language.

### User ID

**Description:** The ID that the user uses to log on to the server in Symposium Call Center Server.

### Password Expires

**Description:** Whether the user's password expires in 180 days. For special users, such as wallboard displays used with third-party software, you may choose not to allow the password to expire.

**Note:** The administrator's password does not expire.

### Access Class

**Description:** The access class to which the user belongs. This should be one of the access classes defined in the previous section.

**Comments**

**Description:** Optional. Additional information about the user.

## Section B: Threshold Class worksheets

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# Overview of threshold class worksheets

## What is a threshold class?

A threshold class is a set of options that specifies how statistics are treated in reports and real-time displays.

The following types of threshold classes are available:

- agent (defined in worksheet SCCS03ag)
- skillset (defined in worksheet SCCS03sk)
- application (defined in worksheet SCCS03ap)
- nodal (defined in worksheet SCCS03cc)

Many of these threshold class types contain two types of thresholds, display and pegging. Display thresholds appear on real-time displays. Pegging thresholds appear in reports and historical statistics.

## Where to look for more information

For more information, see the *Administrator's Guide*.

## Display statistics

For display statistics, you define values for the low and high end of the normal range. When you create a real-time display, you can assign colors to indicate whether the value of the statistic is less than the low value, within the normal range, or greater than the high value.

For example, in a skillset threshold class, you can specify low and high values for the Agent Available statistic. You may set the low (Level 1) value to 3, and the high (Level 2) value to 6. You can create a real-time display definition that shows this statistic as red if it is less than 3, black if it is 3 to 6, and blue if it is greater than 6.

## Pegging statistics

In reports and historical statistics, pegging statistics are used to accumulate data about events like short calls, or delay before a call is answered or abandoned. In a threshold class, you define a cut-off value for these statistics. If a statistic falls below the cut-off, it is not recorded.

For example, you can create a skillset threshold class that defines a short call as a call of less than 10 seconds. Any calls that are less than 10 seconds, and that are directed to skillsets with this threshold class, are pegged as short calls.

**When to configure threshold classes**

You configure threshold classes in Phase 6.

You must create and configure threshold classes before you configure the resources to which you want to assign them.

# Completing the Threshold Class worksheets

## Field descriptions

Complete the appropriate worksheet SCCS03 for each threshold class that you want to define. On the worksheet, specify a threshold class name, and enter information into the Level 1 and Level 2 threshold value fields for each statistic for which you want to define a threshold.

**Note:** You can also define thresholds for custom formulas you create.

### Threshold Class name

**Description:** The name of the threshold class.

**Format:** Up to 30 characters (no spaces)

### Level 1 threshold value

**Description:** For display thresholds, the value for the low end of the normal range. For pegging thresholds, a cut-off value for the statistic.

### Level 2 threshold value

**Description:** The value for the high end of the normal range.

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# Overview of switch administration worksheets

## Introduction

Symposium Call Center Server uses a number of switch resources. It must acquire some of these resources from the switch. It does not acquire others.

## Acquired resources

Symposium Call Center Server must acquire the following switch resources:

- Controlled Directory Numbers (CDNs)
- phonesets
- voice ports

When you configure these resources on the server, you add them to the database maintained on the server. At startup, or whenever you make a change to the resources (for example, if you add a phoneset), the server acquires these resources. When you acquire a resource, the switch sends messages regarding the resource to Symposium Call Center Server.

## Other resources

To make your reports easier to understand, you can assign names to the following resources:

- activity (line of business) codes
- Dialed Number Identification Services (DNISs)
- music/RAN routes

To assign a name to a resource, you must configure it. If you do not configure these resources, they are included in reports, but the Name field is blank.

## When to configure switch resources

You configure switch administration resources in Phase 7.

# Completing the Activity Codes worksheet

## What are activity codes?

An activity (line of business) code is a number that an agent enters on the phoneset keypad during a call. This number identifies the type of call that the agent is handling (for example, customer service, orders, or inquiry). In some cases, the agent may enter several activity codes during the call. You can use the activity codes to track the amount of time spent on various types of incoming calls.

**Note:** To use this feature, you must enable the Line of Business (LOB) feature on the switch.

## How to use activity codes

To record an activity code during a call, agents press the LOB key and enter a 3-digit code. Up to three activity codes can be entered during a single call; for example, if a call changes from a “product inquiry” to an “order,” agents can keep track of the time spent on each function. Managers can then generate reports to identify the time spent on different types of activities, such as product inquiries.

**Note:** To use this feature, you must enable the Line of Business (LOB) feature on the switch.

## How to use Not Ready reason codes

To enter a Not Ready reason code, agents press the Not Ready key to go into Not Ready state. Then they press the Activity Code key and enter a 3-digit code. Managers can then generate reports to analyze how Not Ready time is spent.

## Where to look for more information

For more information, see the *Administrator's Guide*.

## Field descriptions

Complete the following fields on worksheet SCCS04ac:

### Activity Code Name

**Description:** The name of the activity code as you want it to appear in reports.

**Format:** Up to 30 characters (no spaces)

### Activity Code Number

**Description:** The number that the agents enter on their phonesets to assign this activity code to a call.

**Format:** 3 digits

# Completing the Controlled Directory Numbers (CDNs) worksheet

## What are CDNs?

Controlled directory numbers (CDNs) are special directory numbers (DNs) defined on the switch, to which no actual agent is assigned. Instead, a CDN is controlled by an application, such as Symposium Call Center Server. When the switch receives a call on a CDN, it notifies the controlling application, and the application tells the switch how to handle the call.

## How to use CDNs

To control calls in the CDN, you create a script. A script is a set of rules, written in a scripting language, for call handling and processing. Each script is associated with one or more CDNs; all calls entering those CDNs are processed by the script. If a CDN does not have an associated script, calls are put into default mode.

## Where to look for more information

For more information, see the *Administrator's Guide*.

## Prerequisite

Configure the CDNs on the switch. For more information, refer to the *Symposium and DMS/MSL-100 Switch Guide*.

## Field descriptions

Record your system information in the following fields on worksheet SCCS04cdn:

### CDN Name

**Description:** The name of the CDN as you want it to appear in reports.

**Format:** Up to 30 characters (no spaces)

**Note:** For CDN names to appear in reports, the CDN must be acquired through Symposium Call Center Server.

### CDN Number

**Description:** The CDN to be acquired or deacquired by the switch. This number must match the number defined on the switch.

**Format:** 10 digits

**Note:** Once the CDN number has been defined in Symposium Call Center Server, it cannot be modified.

# Completing the Dialed Number Information Services (DNISs) worksheet

## What is a DNIS?

DNIS is a service that allows you to identify the dialed number for calls coming in to the call center.

If you use supplementary DNs, you can define them as DNISs, to record the number of calls to the supplementary numbers.

## How to use DNISs

Typically, DNISs are used for 1-800 numbers. For example, a company may give customers different 1-800 numbers for sales and customer service calls. Calls can be routed to specific skillsets based on that number. Additionally, an agent can receive calls from customers calling in on different DNISs, and tailor the response to the DNIS that appears on the phoneset display.

## Where to look for more information

For more information, see the *Administrator's Guide*.

## Prerequisite

Configure the DNISs on the switch as CDNs, supplementary DNs, or ACD-DNs. For more information, refer to the *Symposium and DMS/MSL-100 Switch Guide*.

## Field descriptions

Record your system information in the following fields on worksheet SCCS04dnis:

### DNIS Name

**Description:** The name of the DNIS as you want it to appear in reports.

**Format:** Up to 30 characters (no spaces)

### DNIS Number

**Description:** The number assigned to the DNIS. This is part or all of the phone number that is dialed by the incoming caller.

**Format:** 10 digits

### Service Level Threshold

**Description:** The service level threshold assigned to the DNIS. The calls answered after threshold fields in reports are incremented when calls coming in on this number are not answered or abandoned within the number of seconds specified here.

# Completing the Music/RAN Routes worksheet

## What is a music/RAN route?

A music/RAN route is a resource installed on the switch that offers music or a recorded announcement to customers who are waiting for their call to be answered.

## Where to look for more information

For more information, see the *Administrator's Guide*.

## How to use music/RAN routes

Your scripts can transfer callers to a music/RAN route configured on the switch. Or, agents can transfer callers to a music/RAN route manually.

## Default route

When you install the server, the dummy route named “Default\_Route” is created to serve as your default RAN route. This dummy route is unlikely to be valid for your system. You must create another valid route to use as the default RAN route.

**Note:** Since Default\_Route is a system-defined route, you cannot delete it.

## Prerequisite

Configure the route on the switch. For more information, refer to the *Symposium and DMS/MSL-100 Switch Guide*.

## Field descriptions

Record your system information in the following fields on worksheet SCCS04mus.

### Music/RAN Route Name

**Description:** The name of the music/RAN route as you want it to appear in reports.

**Format:** Up to 30 characters (no spaces)

### Music/RAN Route Number

**Description:** The number assigned to the music/RAN route when it was configured on the switch.

**Range:** 0–512

# Completing the Phonesets worksheet

## What is a phoneset?

A phoneset is the physical device, connected to the switch, to which calls are presented. Each agent and supervisor must have a phoneset.

## How to use phonesets

Agents log on to phonesets to take calls. Agents use phoneset keys to answer, transfer, and conference calls. The supervisor monitors a phoneset for emergency calls from agents or to observe agent calls.

## Where to look for more information

For more information, see the *Administrator's Guide*.

## Prerequisite

Configure the TN (the physical port address of the phoneset on the switch) and the Secondary DN on the switch. For more information, refer to the *Symposium and DMS/MSL-100 Switch Guide*.

## Field descriptions

Complete the following fields on worksheet SCCS04ph:

### Terminal Name

**Description:** The phoneset name as you want it to appear in reports.

**Format:** Up to 30 characters (no spaces)

### Telephony/port address

**Description:** The position ID of the phoneset, as defined on the switch.

**Format:** 4 digits

**Restriction:** A telephony/port address cannot be changed once the phoneset has been saved. To change the address assigned to a voice port, you must remove the voice port, and then recreate it with the new address.

### Secondary DN

**Description:** The number at which the agent can be reached for non-ACD calls.

# Completing the Voice Ports worksheet

## What is a voice port?

A voice port is a phoneset configured on the switch that connects to an Interactive Voice Response (IVR) system. When adding a voice port, you must add a phoneset, and then configure it as a voice port.

## Limitations

You can define up to 500 voice ports. (If you are using Symposium Web Client, you can define up to 1000 voice ports.)

## Where to look for more information

For more information, see the *Administrator's Guide*.

## Prerequisite

- Configure the phoneset on the switch. For more information, refer to the *Symposium and DMS/MSL-100 Switch Guide*.
- Install and configure the IVR system.

## Field descriptions

Record your system information in the following fields on worksheet SCCS04vp:

### Terminal Name

**Description:** The phoneset name as you want it to appear in reports.

**Format:** Up to 30 characters (no spaces)

### Telephony/port address

**Description:** The position ID of the phoneset, as defined on the switch.

**Format:** 4 digits

**Restriction:** A telephony/port address cannot be changed once it has been saved. To change the address assigned to a voice port, you must remove the voice port, and then recreate it with the new address.

### Voice Port name

**Description:** The name of the voice port, as you want it to appear in reports.

**Format:** Up to 30 characters

### Voice Port Channel

**Description:** The channel number of the voice port. This is the ID for the port on the IVR system.

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# Overview of Call Presentation Classes worksheet

## What are call presentation classes?

An agent call presentation class is a set of call presentation options that can be assigned to a user. For each call presentation class, you can customize the following options:

- how incoming calls are presented to agents; calls can be
  - presented to an agent phoneset for a specified length of time, and then, if not answered, returned to the queue
  - presented to an agent phoneset, remaining there until they are answered or abandoned

## Where to look for more information

For more information, see the *Administrator's Guide*.

## When to configure call presentation classes

You configure call presentation classes in Phase 8.

# Completing the Call Presentation Classes worksheet

## Field descriptions

Complete the following fields on worksheet SCCS05:

### Call Presentation Name

**Description:** The name of the call presentation class.

### Call Presentation Type

**Description:** Choose one of the following call presentation types for the call presentation class:

- **Return Call to Queue after:** Choose this type to return calls to the queue if they have not been answered within the specified amount of time. If you choose this type, in the make phoneset field, indicate whether you want to make the phoneset Busy or Not Ready after the call is returned to the queue.
- **Let Call ring at phoneset:** Choose this type to let calls ring at the phoneset until they are answered.

If you do not choose this option, calls are not presented to agents while they are on a DN call.



## Section E: Skillset worksheets

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# Overview of skillset worksheets

## What is a skillset?

A skillset is a group of agents with the expertise necessary to answer a specific type of call. Skillsets are the basic building blocks of skill-based routing. They are used to match callers with the agents who can best meet their needs.

## What are global skillset settings?

Global skillset settings are settings that apply to all skillsets configured on your system. Configure the global skillset settings to define the default skillset for the system and to specify how agent idle time is calculated.

## Where to look for more information

For more information, see the *Administrator's Guide*.

## When to configure skillsets

You configure skillsets and global settings for skillsets in Phase 9.

# Completing the Skillsets worksheet

## Before you begin

- Complete the Skillset Threshold Class worksheet, SCCS-03sk.
- If you are using a dummy skillset to report statistics for an ACD-DN, define the ACD-DN on the switch. For information on how to define ACD-DNs, refer to the *Symposium and DMS/MSL-100 Switch Guide*.

## Field descriptions

Complete the following fields on worksheet SCCS06:

### Skillset Name

**Description:** Required. The name of the skillset.

**Format:** Up to 30 characters, without spaces

### Threshold Class

**Description:** The threshold class for this skillset.

**For more information:** For a list of available threshold classes, consult your Skillset Threshold Class worksheet.

### Map Skillset to ACD DN Number

**Description:** Check this option if you want calls received on an ACD-DN to be pegged against this skillset. If you select this option, specify the ACD-DN number.

### Call Age Preference

**Description:** Determines how call age is interpreted for this skillset.

- **Oldest:** Choose this option to give priority to the call that has been in the system longest.
- **First in queue:** Choose this option to give priority to the call that has been in the skillset queue longest.

# Completing the Skillsets Global Settings worksheet

## Field descriptions

Complete the following fields of worksheet SCCS07:

### Default Skillset

**Description:** The name of the skillset to which you want to queue calls if they are not handled by the end of a script.

### RAN Route

**Description:** The route number of the default RAN route, to which calls are queued if the default skillset is out of service. Enter the route number as specified on the switch.

### Caller-Entered-Data Delimiter

**Description:** The character used to separate fields in caller-entered data.

### Agent Preference

**Description:** Specify how agent idle time is to be interpreted.

#### Options:

- **Longest total time in Idle state since login:** Select this option if you want the server to present new calls to the agent who has accumulated the greatest amount of idle time since logging on.
- **Longest time in Idle state since last status change:** Select this option if you want the server to present new calls to the agent who has been idle longest since his or her last change of state. (The agent idle timer starts when an agent ends a call, or goes out of Not Ready or Walkaway state.)
- **Longest time since last CDN/ACD call:** Select this option if you want the server to present new calls to the agent who has been idle longest since the end of his or her last Symposium Call Center Server or ACD call.

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# Overview of Call Center User Configuration worksheets

## What are agents?

An agent is a user who can receive incoming calls. An agent account has the following properties:

- the agent's threshold class
- the agent's skillsets
- the agent's call presentation class
- the agent's supervisor

Before you fill out the Agent Configuration worksheet, ensure that the agent's threshold class, skillsets, presentation class, and supervisor have been defined on the appropriate worksheets.

## Where to look for more information

For more information, see the *Administrator's Guide*.

## What are supervisors?

A supervisor is a user who has responsibility for a group of agents. You must assign each agent a reporting supervisor. You can assign one or more associated supervisors.

### Reporting supervisors

Each agent must have one reporting supervisor. The reporting supervisor is the supervisor who

- is notified when the user presses the Emergency key
- has keys on his or her phoneset that are mapped to the agent keys

Supervisors can view information about all reporting agents on their real-time displays.

### Associated supervisors

In addition, an agent may have one or more associated supervisors to provide backup when the reporting supervisor is unavailable. Supervisors can view information about their associated agents in the real-time displays.

## When to configure users

You configure supervisors and agents in Phase 10.

# Completing the Supervisor Configuration worksheet

## Field descriptions

For each supervisor, create a copy of worksheet SCCS08a, and complete the following fields:

### User name

**Description:** The supervisor's name, in the following format:  
firstname lastname.

### Title

**Description:** The supervisor's job title.

### Department

**Description:** The name of the department to which the supervisor belongs.

### Language

**Description:** The supervisor's preferred language.

### Login ID

**Description:** The number that the supervisor enters to log on to the phoneset.

### Telephony/Port Address

**Description:** The position ID of the supervisor's phoneset.

# Completing the Agent Configuration worksheet

## Before you begin

Before you complete the Agent Configuration worksheet, you should perform the following tasks:

- Complete the Agent Threshold Class worksheet, SCCS03ag.
- Complete the Call Presentation Class worksheet, SCCS05.
- Complete the Access Classes worksheet, SCCS01.
- Complete the Skillsets worksheet, SCCS06.
- Complete the Supervisor Configuration worksheet, SCCS08a.

## Field descriptions

For each agent, complete the following fields on worksheet SCCS-08b:

### User Name

**Description:** The agent's name, in the format:  
firstname lastname.

### Title

**Description:** The agent's job title.

### Department

**Description:** The name of the department to which the agent belongs.

### Language

**Description:** The agent's preferred language.

### Login ID

**Description:** The numerical ID that the agent uses to log on to the phoneset.

**Format:** 4 digits

### Call Presentation Class

The call presentation class of the agent. The call presentation class determines how calls are presented to the agent.

### Agent Threshold Class

The threshold class for the agent. The threshold class determines how statistics for this agent are handled in reports and real-time displays.

### Skillset Properties

The skillsets to which this agent belongs. For each skillset, indicate whether the agent is on standby (that is, not actively taking calls for this skillset, but available to do so if

the need arises), or if the agent is active, indicate the priority at which the agent takes calls for this skillset.

**Note:** If you want to assign this agent to a skillset in an agent to skillset assignment, the agent must be a member of the skillset. The agent can be on standby for the skillset.

### **Supervisor Properties**

#### **Reporting supervisor**

**Description:** The name of the agent's primary supervisor.

#### **Associated supervisors**

**Description:** The secondary, or associated, supervisors for this agent.



## Section G: Assignment worksheets

### **In this section**

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Completing the Agent to Supervisor Assignment worksheet	49

# Overview of assignment worksheets

## Introduction

This section explains how to complete the Agent to Skillset and Agent to Supervisor Assignment worksheets.

## What is an agent to skillset assignment?

When you configure agents, you assign them to skillsets. You may need to temporarily assign agents to different skillsets for the following reasons:

- for early morning and late evening shifts, when few agents are available
- to cover other agents' coffee and lunch breaks
- when agents are sick, on vacation, or on course

You can assign temporary skillsets manually, and reassign the skillsets the same way, or you can schedule agent to skillset assignments.

## What is an agent to supervisor assignment?

When you configure agents, you assign them to reporting supervisors. You may need to temporarily change agents' reporting supervisors for the following reasons:

- for early morning and late evening shifts, when few supervisors are available
- to cover supervisors' coffee and lunch breaks
- when supervisors are sick, on vacation, or on course

You can assign temporary supervisors manually, and reassign the normal supervisors when they return, or you can schedule agent to supervisor assignments.

## Where to look for more information

For more information on agent to skillset assignments, see the *Administrator's Guide*.

For more information on agent to supervisor assignments, see the *Administrator's Guide*.

## When to configure assignments

You configure assignments in Phase 11.

# Completing the Agent to Skillset Assignment worksheet

## Before you begin

Before you start the assignments worksheets, make sure that you have already completed the following worksheets:

- Skillsets (SCCS06)
- Skillset Global Settings (SCCS07)
- Agent Configuration (SCCS08b)

**Note:** Agent to skillset assignments allow you to change an agent's priority for a skillset; they do not allow you to assign agents to skillsets. Therefore, agents must be defined as members of the skillsets on the Agent Configuration worksheet.

## Where to look for more information

For more information, see the *Administrator's Guide*.

## Field descriptions

Complete the following fields on worksheet SCCS09:

### Assignment name

**Description:** The name of the agent to skillset assignment.

**Format:** Up to 30 characters

### Agent Name

**Description:** The name of the agent whose skillset settings are to be altered when this assignment is run.

### Supervisor

**Description:** The name of the agent's supervisor.

### Skillset Name

**Description:** The skillsets to which this agent is to be assigned when this assignment is run.

### Priority for this skillset

**Description:** The priority for this agent for this skillset.

#### Options:

- **Standby:** The agent belongs to the skillset but is not taking calls for it.
- **1 to 48:** The agent belongs to the skillset and is taking calls at a priority of 1 (highest) through 48 (lowest).

**Schedule**

**Description:** To specify how often you want the assignment to run, choose the schedule type (Once, Daily, Weekly, Monthly, Yearly, or Unscheduled). Then indicate the following, if applicable:

**Start date**

**Description:** The first date the assignment should be run.

**Start time**

**Description:** The first time the assignment should be run.

**End time**

**Description:** The time after which the assignment should no longer be run.

**Interval**

**Description:** The interval for which the assignment is scheduled to run. The scheduler allows the assignment to be repeated every interval.

**Examples**

- hourly
- daily
- every three days

# Completing the Agent to Supervisor Assignment worksheet

## Before you begin

Before you start the assignments worksheets, make sure that you have already completed the following worksheets:

- Supervisor Configuration (SCCS08a)
- Agent Configuration (SCCS08b)

## Where to look for more information

For more information, see the *Administrator's Guide*.

## Field descriptions

Complete the following fields on worksheet SCCS10:

### Assignment name

**Description:** The name of the agent to supervisor assignment.

### Agent Name

**Description:** The names of the agents whose supervisor assignments will be changed when this assignment is run.

### Login ID

**Description:** The phoneset IDs of the agents.

### Assign to Supervisor

**Description:** The name of the supervisor to whom the agents will report.

### Original Supervisor

**Description:** The name of the agents' original reporting supervisor.

### Schedule

**Description:** To specify how often you want the assignment to run, choose the schedule type (Once, Daily, Weekly, Monthly, Yearly, or Unscheduled). Then indicate the following, if applicable:

### Start date

**Description:** The first date the assignment should be run.

### Start time

**Description:** The first time the assignment should be run.

**End time**

**Description:** The time after which the assignment should no longer be run.

**Interval**

**Description:** The interval for which the assignment is scheduled to run. The scheduler allows the assignment to be repeated every interval.

**Examples:**

- hourly
- daily
- every three days

## Section H: Statistics Collection worksheets

### **In this section**

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Completing the Historical Statistics Collection worksheet	54

# Overview of statistics worksheets

## What are real-time statistics?

You must configure the server to collect the statistics to be displayed in real-time displays. For example, if you want to be able to display agents available in a skillset, you must configure the server to collect skillset statistics.

In addition to the type of statistics to be collected, you can choose

- viewing modes for the different statistics groups (moving window or interval-to-date)
- the start time and length of the interval in which real-time statistics are accumulated
- the frequency with which real-time statistics are refreshed

If you choose not to collect statistics, you cannot open displays containing those statistics. For example, if you do not collect application statistics, you cannot open application real-time displays.

### Moving window

In moving window mode, statistics are collected for a block of time representing the last 10 minutes of system activity.

### Interval-to-date

In interval-to-date mode, statistics are collected only for the current interval. When the interval is over, data fields initialize to zero and collection begins for the next interval.

## What are historical statistics?

You must configure the server to collect the statistics to be included in reports. For example, if you want to be able to report on agent productivity, you must configure the server to collect agent statistics.

In addition to the type of statistics to be collected, you can choose

- how long historical statistics are stored on your system
- the applications for which call-by-call statistics are collected

The statistics are stored in the system database. Your choices determine the amount of disk space required for the database.

## Where to look for more information

For more detailed information about real-time and historical statistics, refer to the *Administrator's Guide*.

## When to configure reports

You configure statistics collection in Phase 12.

# Completing the Real-time Statistics Collection worksheet

## Field descriptions

Record your system information in the following fields on worksheet SCCS11:

### Statistic to be collected

**Description:** Check the boxes for each type of statistics you want to collect. If you choose not to collect statistics, you cannot open displays containing those statistics. For example, if you do not collect application statistics, you cannot open application real-time displays.

**Note:** Skillset and nodal statistics are always collected.

### Modes

**Description:** Select the mode you want to use to collect real-time data for each type of statistic you are collecting.

**Values:** The modes available vary depending on the type of statistics. These include

- Interval to date
- Moving window and interval to date
- Moving window

**Note:** For more information about modes, see “What are real-time statistics?” on page 52.

### Data Collection Interval

**Description:** The duration for each real-time statistics interval.

**Values:** 15 minutes, 30 minutes, 45 minutes, 1 hour, 2 hours, 3 hours, 4 hours, 6 hours, 8 hours, 12 hours, 24 hours

### One of the Intervals starts at

**Description:** If you choose to use the interval to date mode, specify the start time for one of the selected intervals. This time can be the start time for any interval for the day.

When you specify one of the interval start times, the system calculates the remaining intervals (following and preceding the specified start time) for the day.

**Format:** hh:mm

### Minimum Refresh Rate for Agent Real-time Displays

**Description:** The minimum refresh rate in seconds for agent real-time displays.

**Minimum value:** 0.5 seconds

### Minimum Refresh Rate for Other Real-time Displays

**Description:** The minimum refresh rate in seconds for all other real-time displays.

**Minimum value:** 2 seconds

# Completing the Historical Statistics Collection worksheet

## Field descriptions

Record your system information in the following fields on worksheet SCCS12:

### Section A: Options

#### Call Flows

**Description:** The call flow statistics to be collected. You can choose to collect the following call flow statistics:

- application
- CDN
- skillset
- activity code
- DNIS
- music/RAN route

#### Agent

**Description:** The agent statistics to be collected. You can choose to collect the following types of agent statistics:

- performance
- by application
- by skillset
- login/logout

### Section B: Parameters

#### Active Agents

**Description:** The number of agents logged on at any time.

#### Agent Positions

**Description:** The number of phonesets defined in the system.

#### Skillsets

**Description:** The number of skillsets defined in the system.

#### Calls per hour

**Description:** The estimated number of calls arriving at the call center within an hour.

#### DNISs

**Description:** The number of DNISs configured on the system.

**CDNs**

**Description:** The number of CDNs configured on the system.

**Activity Codes**

**Description:** The number of activity codes configured on the system.

**Agent Events per Day**

**Description:** The number of agent events (login, logout, walkaway, return from walkaway) that occur in one day.

**RAN Routes**

**Description:** The number of RAN routes configured on the system.

**Music Routes**

**Description:** The number of music routes configured on the system.

**Applications**

**Description:** The number of applications configured on the system.

**Nodes**

**Description:** The number of nodes. (Only one node is supported in the current version.)

**IVR ports**

**Description:** The number of voice ports configured on the system.

**Note:** When you configure the parameters, be sure to allow for future growth.

**Section C: Duration****Interval**

**Description:** The number of days interval data is stored by the system.

**Daily**

**Description:** The number of days daily data is stored by the system.

**Weekly**

**Description:** The number of weeks weekly data is stored by the system.

**Monthly**

**Description:** The number of months monthly data is stored by the system.

**IVR Voice Port**

**Description:** The number of days voice port statistics are stored by the system.

**Agent Login/Logout**

**Description:** The number of days agent login and logout statistics data is stored by the system.

**First Business Day**

**Description:** The day defined as the first business day of the week.

**Length of Business Day**

**Description:** The number of hours per business day that the system collects historical statistics data.

**Business week**

**Description:** The number of business days per week for which the system collects historical statistics data.

**Call by Call**

**Description:** The number of days call-by-call statistics data is stored by the system.

**Section D: Call by Call**

Lists the applications for which you want to be able to collect call-by-call statistics.

# Glossary

## A

### **accelerator key**

A key on a phoneset that an agent can use to place a call quickly. When an agent presses an accelerator key, the system places the call to the configured number associated with the key. For example, if an agent presses the Emergency key, the system places a call to the agent's supervisor.

### **access class**

A collection of access levels that defines the actions a member of the access class can perform within the system. For example, a member of the Administrator access class might be given a collection of Read/Write access levels.

### **access level**

A level of access or permission given to a particular user for a particular application or function. For example, a user might be given View Only access to historical reports.

### **ACD call**

*See* Automatic call distribution call.

### **ACD-DN**

*See* Automatic call distribution directory number.

### **ACD group**

*See* Automatic call distribution group.

### **ACD routing table**

*See* Automatic call distribution routing table.

### **ACD subgroup**

*See* Automatic call distribution subgroup.

### **acquired resource**

A resource configured on the switch that is under the control of Symposium Call Center Server. Resources must be configured with matching values on both the switch and Symposium Call Center Server.

### **activated script**

A script that is processing calls or is ready to process calls. Before you can activate a script, you must first validate it.

### **active server**

In a system with a Replication Server, the server that is providing call processing and administration services.

**activity code**

A number that an agent enters on his or her phoneset during a call. Activity codes provide a way of tracking the time agents spend on various types of incoming calls. They are also known as Line of Business (LOB) codes. For example, the activity code 720 might be used to track sales calls. Agents can then enter 720 on their phonesets during sales calls, and this information can be generated in an Activity Code report.

**administrator**

A user who is responsible for setting up and maintaining Symposium Call Center Server.

**agent**

A user who is responsible for handling customer calls.

**agent logon ID**

A unique identification number assigned to a particular agent. The agent uses this number when logging on. The agent ID is not associated with any particular phoneset.

**agent to skillset assignment**

A matrix that, when you run it, sets the priority of one or more agents for a skillset. Agent to skillset assignments can be scheduled.

**agent to supervisor assignment**

A definition that, when you run it, assigns one or more agents to specific supervisors. Agent to supervisor assignments can be scheduled.

**API**

*See* application program interface.

**application**

1. A logical entity that represents a Symposium Call Center Server script for reporting purposes. The Master script and each primary script have an associated application. The application has the same name as the script it represents. 2. A program that runs on a computer.

**application program interface**

A set of routines, protocols, and tools that programmers use to develop software applications. APIs simplify the development process by providing commonly used programming procedures.

**application server**

The server on which the Symposium Web Client software is installed. This server acts as the middle layer that communicates with Symposium Call Center Server and makes information available to the client PCs.

**associated supervisor**

A supervisor who is available for an agent if the agent's reporting supervisor is unavailable. *See also* reporting supervisor.

**Automatic call distribution**

A means of automatically distributing an organization's incoming calls among a number of answering positions (ACD agents). Automatic call distribution is useful in operations where callers want a service rather than a specific person. Calls are serviced in the order in which they arrive and are distributed so that the workload at each answering position is approximately equal.

**Automatic call distribution call**

A call to an ACD-DN. ACD calls are distributed to agents in an ACD group based on the ACD routing table on the switch. *See also* Automatic call distribution directory number.

**Automatic call distribution directory number**

A primary or supplementary DN associated with an ACD group. Calls made to an automatic call distribution directory number are distributed to agents belonging to the group, based on the ACD routing table on the switch.

**Automatic call distribution group**

An entity defined on the switch for the purpose of call distribution. When a customer dials an ACD group, the call is routed to any agent who is a member of that group.

**Automatic call distribution routing table**

A table configured on the switch that contains a list of ACD-DNs used to define routes for incoming calls. This ensures that incoming calls not processed by Symposium Call Center Server will be queued to ACD groups and handled by available agents.

**Automatic call distribution subgroup**

An entity defined on the switch to assign supervisory responsibilities. Each subgroup has one supervisor phoneset and a number of agent phonesets associated with it. Agents can log on to any phoneset within their ACD subgroup. The supervisor must log on to the supervisor phoneset to monitor his or her assigned agents.

**C****call age**

The amount of time a call was waiting in the system before being answered by an agent.

**call intrinsic**

A script element that stores call-related information assigned when a call enters Symposium Call Center Server. *See also* intrinsic, skillset intrinsic, time intrinsic, traffic intrinsic.

**call presentation class**

A collection of preferences that determines how calls are presented to an agent.

**call priority**

A numerical value assigned in a script that defines the relative importance of a call. If two calls are in the queue when an agent becomes available, and one call is queued with a higher priority than the other, the agent receives the higher priority call first. *See also* skillset priority.

**call treatment**

A script element that enables you to provide handling to a call while it is waiting to be answered by a call center agent. For example, a caller can hear a recorded announcement or music while waiting for an agent.

**call variable**

A script variable that applies to a specific call. A call variable follows the call through the system and is passed from one script to another with the call. *See also* global variable, script variable.

**Calling Line Identification**

An optional service that identifies the telephone number of the caller. This information can then be used to route the call to the appropriate agent or skillset. The CLID can also be displayed on an agent's phoneset.

**CallPilot**

A multimedia messaging system you can use to manage many types of information, including voice messages, fax messages, e-mail messages, telephone calls (including conferencing), calendars, and directories.

**CDN**

*See* controlled directory number.

**CLAN**

*See* Customer local area network.

**Classic Client**

The Windows-based client component for Symposium Call Center Server.

**CLID**

*See* Calling Line Identification.

**client**

The part of Symposium Call Center Server that runs on a personal computer or workstation and relies on the server to perform some operations. Two types of client are available: Classic Client and Symposium Web Client. *See also* server.

**command**

A building block used with expressions, variables, and intrinsics to create scripts. Commands perform distinct functions, such as routing a call to a specific destination, playing music to a caller, or disconnecting a caller.

**Contivity VPN Switch**

A Nortel Networks product that provides routing, firewall, bandwidth management, encryption, authentication, and data integrity for secure tunneling across managed IP networks and the Internet.

**controlled directory number**

A special directory number that allows calls arriving at the switch to be queued when the CDN is controlled by an application such as Symposium Call Center Server. When a call arrives at this number, the switch notifies the application and waits for routing instructions, which are performed by scripts in Symposium Call Center Server.

**CTI**

Computer Telephony Integration

**Customer local area network**

The LAN to which your corporate services and resources connect. The server in Symposium Call Center Server and the client both connect to the CLAN. Third-party applications that interface with the server also connect to this LAN.

**D****DBMS**

Database Management System

**deactivated script**

A script that does not process any new calls. If a script is in use when it is deactivated, calls continue to be processed by the script until they are completed.

**default activity code**

The activity code that is assigned to a call if an agent does not enter an activity code manually, or when an agent presses the activity code button twice on his or her phoneset.

**default skillset**

The skillset to which calls are queued if they have not been queued to a skillset or a specific agent by the end of a script.

**desktop user**

A configured user who can log on to Symposium Call Center Server from a client PC.

**DHCP**

*See* dynamic host configuration protocol.

**Dial-Up Networking**

*See* Remote Access Services.

**Dialed Number Identification Service**

An optional service that allows Symposium Call Center Server to identify the phone number dialed by the incoming caller. An agent can receive calls from customers calling in on different DNISs and, if the DNIS is displayed on the phoneset, can prepare a response according to the DNIS.

**directory number**

The number that identifies a phoneset on a switch. The directory number (DN) can be a local extension (local DN), a public network telephone number, or an automatic call distribution directory number (ACD-DN).

**directory number call**

A call that is presented to the DN key on an agent's phoneset.

**display threshold**

A threshold used in real-time displays to highlight a value below or above the normal range.

**DMS**

Digital Multiplex Switch

**DN**

*See* directory number.

**DN call**

*See* directory number call.

**DNIS**

*See* Dialed Number Identification Service.

**dongle**

The attachment plugged into the parallel port of a server connected to a DMS/MSL-100 switch that authenticates the serial number required at the time of server installation.

**dynamic host configuration protocol**

A protocol for dynamically assigning IP addresses to devices on a network.

**dynamic link library**

A library of executable functions or data that can be used by a Windows application. Typically, a DLL provides one or more particular functions, and a program accesses the functions by creating either a static or dynamic link to the DLL. Several applications can use a DLL at the same time.

**E****ELAN**

*See* embedded local area network.

**embedded local area network**

A dedicated Ethernet TCP/IP LAN that connects the server in Symposium Call Center Server and the switch.

**Emergency key**

A key on an agent's phoneset that, when pressed by an agent, automatically calls his or her supervisor to notify the supervisor of a problem with a caller.

**event**

1. An occurrence or action on Symposium Call Center Server, such as the sending or receiving of a message, the opening or closing of an application, or the reporting of an error. Some events are for information only, while others can indicate a problem. Events are categorized by severity: information, minor, major, and critical. 2. An action generated by a script command, such as queuing a call to a skillset or playing music.

**expression**

A building block used in scripts to test for conditions, perform calculations, or compare values within scripts. *See also* logical expression, mathematical expression, relational expression.

**F****first-level threshold**

The value that represents the lowest value of the normal range for a statistic in a threshold class. The system tracks how often the value for the statistic falls below this value.

**G****global settings**

Settings that apply to all skillsets that are configured on your system.

**global variable**

A variable that contains values that can be used by any script on the system. You can only change the value of a global variable in the Script Variable Properties sheet. You cannot change it in a script. *See also* call variable, variable.

**H****HDX**

*See* Host Data Exchange.

**Host Data Exchange**

A rich scripting language provided with Symposium Call Center Server to control treatment of calls.

**I****ICM**

*See* Intelligent Call Manager.

**Incalls key**

The key on an agent phoneset to which incoming ACD and Symposium Call Center Server calls are presented.

**Intelligent Call Manager**

A high capacity call center TCP/IP interface to the switch that enables the exchange of messages between the switch and a remote host computer.

**Internet Protocol address**

An identifier for a computer or device on a TCP/IP network. Networks use the TCP/IP protocol to route messages based on the IP address of the destination. The format of an IP address is a 32-bit numeric address written as four values separated by periods. Each value can be 0 to 255. For example, 1.160.10.240 could be an IP address.

**intrinsic**

A word or phrase used in a script to gain access to system information about skillsets, agents, time, and call traffic that can then be used in formulas and decision-making statements. *See also* call intrinsic, skillset intrinsic, time intrinsic, traffic intrinsic.

**IP address**

*See* Internet Protocol address.

**L****LAN**

*See* Local area network.

**Line of Business code**

*See* activity code.

**LOB code**

*See* activity code.

**Local area network**

A computer network that spans a relatively small area. Most LANs connect workstations and personal computers, and are confined to a single building or group of buildings.

**logical expression**

A symbol used in scripts to test for different conditions. Logical expressions are AND, OR, and NOT. *See also* expression, mathematical expression, relational expression.

**M****Management Information Base**

A data structure that describes the collection of all possible objects in a network. Each managed node maintains one or more variables (objects) that describe its state. Symposium Call Center Server Management Information Bases (MIBs) contribute to the overall network MIB by

- identifying Nortel Networks/Meridian/Symposium Call Center Server nodes within the network
- identifying significant events (SNMP traps), such as alarms reporting
- specifying formats of alarms

**Master script**

The first script executed when a call arrives at Symposium Call Center Server. A default Master script is provided with Symposium Call Center Server, but it can be customized by an authorized user. It can be deactivated but not deleted. *See also* primary script, script, secondary script.

**mathematical expression**

An expression used in scripts to add, subtract, multiply, and divide values. Mathematical expressions are addition (+), subtraction (-), division (/), and multiplication (\*). *See also* expression, logical expression, relational expression.

**Meridian Link Services**

A communications facility that provides an interface between the switch and a third-party host application.

**MIB**

*See* Management Information Base.

**MLS**

*See* Meridian Link Services.

**MSL-100**

Meridian Stored Logic 100 switch

**music route**

A resource installed on the switch that provides music to callers while they wait for an agent.

**N****network interface card**

An expansion board that enables a PC to be connected to a local area network (LAN).

**night mode**

A skillset state in which the server does not queue incoming calls to the skillset, and in which all queued calls are given night treatment. A skillset goes into night mode automatically when the last agent logs off, or the administrator can put it into night mode manually. *See also* out-of-service mode, transition mode.

**NPA**

*See* Number Plan Area.

**Number Plan Area**

Area code

**O****object linking and embedding**

A compound document standard that enables you to create objects with one application, and then link or embed them in a second application.

**ODBC**

*See* Open Database Connectivity.

**OEM**

Original equipment manufacturer

**OLE**

*See* object linking and embedding.

**Open Database Connectivity**

A Microsoft-defined database application program interface (API) standard.

**Optivity Telephony Manager**

A Nortel Networks application used for switch management. It provides management simplicity and flexible control.

**OTM**

*See* Optivity Telephony Manager.

**out-of-service mode**

A skillset state in which the skillset does not take calls. A skillset is out of service if there are no agents logged on or if the supervisor puts the skillset into out-of-service mode manually. *See also* night mode, transition mode.

**out-of-service skillset**

A skillset that is not taking any new calls. While a skillset is out of service, incoming calls cannot be queued to the skillset. *See also* skillset.

**P****pegging**

The action of incrementing statistical counters to track and report on system events.

**pegging threshold**

A threshold used to define a cut-off value for statistics, such as short call and service level. Pegging thresholds are used in reports.

**PEP**

*See* Performance Enhancement Package.

**Performance Enhancement Package**

A Symposium Call Center Server supplementary software application that enhances the functionality of previously released software by improving performance, adding functionality, or correcting a problem discovered since the original release.

**phoneset**

The physical device, connected to the switch, to which calls are presented. Each agent and supervisor must have a phoneset.

**phoneset display**

The display area on an agent's phoneset where information about incoming calls can be communicated.

**Position ID**

A unique identifier for a phoneset, used by the switch to route calls to the phoneset. Referred to as Telephony/Port Address in Symposium Call Center Server.

**primary ACD-DN**

A directory number that callers can dial to reach an ACD group.

**primary script**

A script that is executed or referenced by the Master script. A primary script can route calls to skillsets, or it can transfer routing control to a secondary script. *See also* Master script, script, secondary script.

## R

### **RAN**

recorded announcement

### **RAN route**

*See* recorded announcement route.

### **RAS**

*See* Remote Access Services.

### **Real-time Statistics Multicast**

An interface that provides real-time information to third-party applications in either multicast or unicast format.

### **recorded announcement route**

A resource installed on the switch that offers a recorded announcement to callers.

### **relational expression**

An expression used in scripts to test for different conditions. Relational expressions are less than (<), greater than (>), less than or equal to (<=), greater than or equal to (>=), and not equal to (<>). *See also* expression, logical expression, mathematical expression.

### **Remote Access Services**

A feature built into Windows NT and Windows 95 that enables users to log on to an NT-based LAN using a modem, X.25 connection, or WAN link. This feature is also known as Dial-Up Networking.

### **Replication Server**

A server that backs up the active server to the standby server in real time.

### **reporting supervisor**

The supervisor who has primary responsibility for an agent. When an agent presses the Emergency key on the phoneset, the emergency call is presented to the agent's reporting supervisor. *See also* associated supervisor.

### **RSM**

*See* Real-time Statistics Multicast.

## S

### **sample script**

A script that is installed with the Symposium Call Center Server client. Sample scripts are stored as text files in a special folder on the client. The contents of these scripts can be imported or copied into user scripts to create scripts for typical call center scenarios.

### **SCM**

*See* Service Control Manager.

**script**

A set of instructions that relates to a particular type of call, caller, or set of conditions, such as time of day or day of week. *See also* Master script, primary script, secondary script.

**script variable**

*See* variable.

**second-level threshold**

The value used in display thresholds that represents the highest value of the normal range for a given statistic. The system tracks how often the value for the statistic falls outside this value.

**secondary directory number**

A DN defined on the agent's phoneset as a Centrex line for incoming and outgoing non-ACD calls.

**secondary script**

Any script (other than a Master or primary script) that is referenced from a primary script or any other secondary script. There is no pegging of statistics for actions occurring during a secondary script. *See also* Master script, primary script, script.

**server**

A computer or device on a network that manages network resources. Examples of servers include file servers, print servers, network servers, and database servers. Symposium Call Center Server is used to configure the operations of the call center. *See also* client.

**service**

A process that adheres to a Windows NT structure and requirements. A service provides system functionality.

**Service Control Manager**

A Windows NT process that manages the different services on the PC.

**service level**

The percentage of incoming calls answered within a configured number of seconds.

**service level threshold**

A parameter that defines the number of seconds within which incoming calls should be answered.

**Simple Network Management Protocol**

A systematic way of monitoring and managing a computer network. The SNMP model consists of four components:

- managed nodes, which are any device, such as hosts, routers, and printers, capable of communicating status to the outside world via an SNMP management process called an SNMP Agent
- management stations, which are computers running special network management software that interact with the Agents for status

- management information, which is conveyed through exact specifications and format of status specified by the MIB
- Management Protocol or SNMP, which sends messages called protocol data units (PDUs)

**site**

A system using Symposium Call Center Server that can be accessed using SMI.

**skillset**

A group of capabilities or knowledge required to answer a specific type of call.

**skillset intrinsic**

A script element that inserts information about a skillset in a script. Skillset intrinsics return values such as skillsets, integers, and agent IDs. These values are then used in queuing commands. *See also* call intrinsic, intrinsic, time intrinsic, traffic intrinsic.

**skillset priority**

An attribute of a skillset assignment that determines the order in which calls from different skillsets are presented to an agent. When an agent becomes available, calls might be waiting for several of the skillsets to which the agent belongs. The server presents the call queued for the skillset for which the agent has the highest priority.

**SNMP**

*See* Simple Network Management Protocol.

**standby**

In skillset assignments, a property that grants an agent membership in a skillset, but makes the agent inactive for that skillset.

**standby server**

A server that contains an up-to-date version of the database, for use when the active server becomes unavailable.

**supervisor**

A user who manages a group of agents. *See also* associated supervisor, reporting supervisor.

**supplementary ACD-DN**

A DN associated with a primary DN. Any calls to the supplementary DN are automatically routed to the primary DN. A supplementary DN can be a toll-free (1-800) number.

**SWCP**

*See* Symposium Web Center Portal.

**switch**

The hardware that receives incoming calls and routes them to their destination.

**switch resource**

A device that is configured on the switch. For example, a CDN is configured on the switch, and then is used as a resource with Symposium Call Center Server. *See also* acquired resource.

**Symposium Agent**

An agent productivity tool that enables contact center agents to provide intelligent and personalized customer care. Agents use a personal computer to access the agent telephony functions.

**Symposium Call Center Server**

A client/server contact center solution for varied and changing business requirements. It offers a suite of applications that includes call processing and agent handling, management and reporting, networking, and third-party application interfaces.

**Symposium Call Center Server call**

A call to a CDN that is controlled by Symposium Call Center Server. The call is presented to the Incalls key on an agent's phoneset.

**Symposium Web Center Portal**

A client/server contact center application that expands contact center e-mail capabilities to allow agents to view, respond to, and track requests over the Internet.

**Symposium Web Client**

A browser-based tool for call center administrators and supervisors used for managing and configuring a contact center and its users, defining access to data, and viewing real-time and historical reports. The Symposium Web Client software is installed on an application server. *See also* application server.

**Symposium Standby Server**

The server that contains an up-to-date backup version of the Symposium Call Center Server database, for use if the active server fails. The database is kept up-to-date by the Replication Server.

**system-defined script**

The Master\_Script can be customized or deactivated by a user, but cannot be deleted. This script is the first script executed for every call arriving at the call center.

**T****TAPI**

*See* Telephony Application Program Interface.

**TCP/IP**

*See* Transmission Control Protocol/Internet Protocol.

**TDM**

*See* Time-Division Multiplex.

**telephony**

The science of translating sound into electrical signals, transmitting them, and then converting them back to sound. The term is used frequently to refer to computer hardware and software that perform functions traditionally performed by telephone equipment.

**Telephony Application Program Interface**

An interface between the switch and an application that allows the application to control the telephone on a user's desktop.

**threshold**

A value for a statistic at which system handling of the statistic changes.

**threshold class**

A set of options that specifies how statistics are treated in reports and real-time displays. *See also* display threshold, pegging threshold.

**Time-Division Multiplex**

A method of transmission in which a signal is separated into multiple segments at the transmission source, and then reassembled at the receiving end.

**time intrinsic**

A script element that stores information about system time, including time of day, day of week, and week of year. *See also* call intrinsic, intrinsic, skillset intrinsic, traffic intrinsic.

**Token Ring**

A PC network protocol developed by IBM. A Token Ring network is a type of computer network in which all the computers are arranged schematically in a circle.

**traffic intrinsic**

An intrinsic that inserts information about system-level traffic in a script. *See also* call intrinsic, intrinsic, skillset intrinsic, time intrinsic.

**transition mode**

A skillset state in which the server presents already queued calls to a skillset. New calls queued to the skillset are given out-of-service treatment. *See also* night mode, out-of-service mode.

**Transmission Control Protocol/Internet Protocol**

The communication protocol used to connect devices on the Internet. TCP/IP is the standard protocol for transmitting data over networks.

**treatment**

*See* call treatment.

**U****user-created script**

A script that is created by an authorized user on the Symposium Call Center Server system. Primary and secondary scripts are user-created scripts.

**user-defined script**

A script that is modified by an authorized user on the Symposium Call Center Server system.

**utility**

A program that performs a specific task, usually related to managing system resources. Operating systems contain a number of utilities for managing disk drives, printers, and other devices.

**V****validation**

The process of checking a script to ensure that all the syntax and semantics are correct. A script must be validated before it can be activated.

**variable**

A placeholder for values calculated within a script, such as CLID. Variables are defined in the Script Variable Properties sheet and can be used in multiple scripts to determine treatment and routing of calls entering Symposium Call Center Server. *See also* call variable, global variable.

**Virtual Private Network**

A private network that is configured within a public network to take advantage of the economies of scale and management facilities of large networks.

**VPN**

*See* Virtual Private Network.

**W****WAN**

*See also* Wide area network.

**Wide area network**

A computer network that spans a relatively large geographical area. Typically, a WAN consists of two or more local area networks (LANs). The largest WAN in existence is the Internet.

**workload scenarios**

Sets of configuration values defined for typical patterns of system operations. Five typical workload scenarios (entry, small, medium, large, and upper end) are used in the Capacity Assessment Tool for capacity analysis for Symposium Call Center Server.

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# Appendix A

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## Worksheets



# Access Classes worksheet

SCCS01 (1/2)

System Name	
Comments:	

Indicate the access privileges for each of the items on the system tree. Valid choices include:

None (default), View, Edit, Create/Delete.

Access Class Name (e.g., Admin_class)	Access: None, View, Edit, Create/Delete				
Scheduler	N V E C	N V E C	N V E C	N V E C	N V E C
Event Preferences	N V E C	N V E C	N V E C	N V E C	N V E C
Event Browser	N V	N V	N V	N V	N V
Alarm Monitor	N V C	N V C	N V C	N V C	N V C
Server Performance Monitor	N V	N V	N V	N V	N V
Switch Resources	N V E	N V E	N V E	N V E	N V E
Server Settings	N V	N V	N V	N V	N V
Access Classes	N V E C	N V E C	N V E C	N V E C	N V E C
Connected Sessions	N V E C	N V E C	N V E C	N V E C	N V E C
Users	N VR VRE EA EU EUC	N VR VRE EA EU EUC	N VR VRE EA EU EUC	N VR VRE EA EU EUC	N VR VRE EA EU EUC
Backup Scheduler	N V E C	N V E C	N V E C	N V E C	N V E C
Call Presentation Classes	N V E C	N V E C	N V E C	N V E C	N V E C
Agent to Supervisor Assignments	N VA VAA	N VA VAA	N VA VAA	N VA VAA	N VA VAA
Agent to Skillset Assignments	N VO VOA VA VAA	N VO VOA VA VAA	N VO VOA VA VAA	N VO VOA VA VAA	N VO VOA VA VAA
Skillsets	N V E C	N V E C	N V E C	N V E C	N V E C
Activity Codes	N V E C	N V E C	N V E C	N V E C	N V E C
Phonesets	N V E C	N V E C	N V E C	N V E C	N V E C
Scripts	N V E C	N V E C	N V E C	N V E C	N V E C
DNISs	N V E C	N V E C	N V E C	N V E C	N V E C

# Access Classes worksheet

SCCS01 (2/2)

Access Class Name (e.g., Admin_class)					
Access: None, View, Edit, Create/Delete					
Applications	N V E	N V E	N V E	N V E	N V E
Script Variables	N V E C	N V E C	N V E C	N V E C	N V E C
CDNs	N V E C	N V E C	N V E C	N V E C	N V E C
Voice Ports	N V E C	N V E C	N V E C	N V E C	N V E C
Historical Statistics	N V E	N V E	N V E	N V E	N V E
Real-time Statistics	N V E	N V E	N V E	N V E	N V E
Music/RAN Routes	N V E C	N V E C	N V E C	N V E C	N V E C
Real-time Displays	N VO VOD VA VAD				
Formulas	N V E C	N V E C	N V E C	N V E C	N V E C
Agent Threshold Classes	N V E C	N V E C	N V E C	N V E C	N V E C
Application Threshold Classes	N V E C	N V E C	N V E C	N V E C	N V E C
Nodal Threshold Classes	N V E	N V E	N V E	N V E	N V E
Skillset Threshold Classes	N V E C	N V E C	N V E C	N V E C	N V E C
Reports	N C	N C	N C	N C	N C
Reports-Agent Performance	N C	N C	N C	N C	N C
Reports-Call by Call	N C	N C	N C	N C	N C
Reports-Other	N C	N C	N C	N C	N C
Emergency Help	N V	N V	N V	N V	N V



# Agent Threshold Class worksheet

SCCS03ag

System Name

Threshold Class Name							
Threshold	Threshold Type	Level 1 threshold value	Level 2 threshold value	Level 1 threshold value	Level 2 threshold value	Level 1 threshold value	Level 2 threshold value
Active	Display						
Break	Display						
Busy	Display						
Call Present	Display						
Consultation	Display						
Emergency	Display						
Idle	Display						
Not Ready	Display						
On Hold	Display						
Reserve	Display						
Walkaway	Display						

# Application Threshold Class worksheet

SCCS03ap

System Name	
-------------	--

Threshold Class Name							
Threshold	Threshold Type	Level 1 threshold value	Level 2 threshold value	Level 1 threshold value	Level 2 threshold value	Level 1 threshold value	Level 2 threshold value
%Abandoned Aft Threshold	Display						
%Calls Abandoned	Display						
%Service Level	Display						
Average Abandon Dly	Display						
Average Answer Delay	Display						
Calls Abandoned	Display						
Calls Abandoned Delay	Display						
Calls Abdnd Aft Threshold	Display						
Calls Answd Aft Threshold	Display						
Calls Answd Dly at Skillset	Display						
Calls Answered	Display						
Calls Answered Delay	Display						
Calls Given Terminate	Display						
Calls Offered	Display						
Calls Waiting	Display						
Max Wait Time	Display						
Service Level Threshold	Display						
Short Call	Pegging						
Waiting Time	Display						

# Skillset Threshold Class worksheet

SCCS03sk

System Name	
-------------	--

Threshold Class Name							
Threshold	Threshold Type	Level 1 threshold value	Level 2 threshold value	Level 1 threshold value	Level 2 threshold value	Level 1 threshold value	Level 2 threshold value
%Service Level for Ans Calls	Display						
%Service_Level_S	Display						
Agent Available	Display						
Agent in Service	Display						
Agent Not Ready	Display						
Agent on ACD-DN call	Display						
Agent on DN call	Display						
Agent on NACD-DN call	Display						
Agent on Other Skillst	Display						
Agent on This Skillset call	Display						
Agent Unavailable	Display						
Average_Answer_Delay_S	Display						
Call Aband Delay Aft Threshold	Display						
Call Abandon	Display						
Call Abandon Delay	Display						
Call Offered	Display						
Calls Answd Aft Threshold	Display						
Calls Answered	Display						
Calls Waiting	Display						
Expected Wait Time	Display						
Longest Wait Time Since Last Call	Display						
Longest Wait Since Login	Display						
Max Wait Time	Display						
Service Level Threshold	Pegging						
Short call	Pegging						
Total Answered Delay	Display						
Total Wait Time	Display						

# Nodal Threshold Class worksheet

SCCS03cc (1/1)

System	
--------	--

Threshold Class Name		Nodal_Template	
Threshold	Threshold Type	Level 1 threshold value	Level 2 threshold value
Calls Answered	Display		
Calls Offered	Display		
Calls Waiting	Display		

















# Skillsets Global Settings worksheet

SCCS07

System Name	
<b>Default Skillset</b> (e.g., General_Inquiries)	
<b>RAN Route</b> (e.g., 7600)	
<b>Caller-Entered-Data Delimiter</b>	
<b>Agent Preference</b>	Longest total time in Idle state since login Longest time in idle state since last status change Longest time since last CDN/ACD call





**Skillset Properties**

**SCCS08b(2/3)**

Skillset name	Priority	Skillset name	Priority	Skillset name	Priority	Skillset name	Priority
If the Skillset is on Priority, click the Priority radio button and enter the Priority number ( 1 to 48)							
	<input type="radio"/> Standby <input type="radio"/> Priority _____		<input type="radio"/> Standby <input type="radio"/> Priority _____		<input type="radio"/> Standby <input type="radio"/> Priority _____		<input type="radio"/> Standby <input type="radio"/> Priority _____
	<input type="radio"/> Standby <input type="radio"/> Priority _____		<input type="radio"/> Standby <input type="radio"/> Priority _____		<input type="radio"/> Standby <input type="radio"/> Priority _____		<input type="radio"/> Standby <input type="radio"/> Priority _____
	<input type="radio"/> Standby <input type="radio"/> Priority _____		<input type="radio"/> Standby <input type="radio"/> Priority _____		<input type="radio"/> Standby <input type="radio"/> Priority _____		<input type="radio"/> Standby <input type="radio"/> Priority _____
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	<input type="radio"/> Standby <input type="radio"/> Priority _____		<input type="radio"/> Standby <input type="radio"/> Priority _____		<input type="radio"/> Standby <input type="radio"/> Priority _____		<input type="radio"/> Standby <input type="radio"/> Priority _____
	<input type="radio"/> Standby <input type="radio"/> Priority _____		<input type="radio"/> Standby <input type="radio"/> Priority _____		<input type="radio"/> Standby <input type="radio"/> Priority _____		<input type="radio"/> Standby <input type="radio"/> Priority _____
	<input type="radio"/> Standby <input type="radio"/> Priority _____		<input type="radio"/> Standby <input type="radio"/> Priority _____		<input type="radio"/> Standby <input type="radio"/> Priority _____		<input type="radio"/> Standby <input type="radio"/> Priority _____
	<input type="radio"/> Standby <input type="radio"/> Priority _____		<input type="radio"/> Standby <input type="radio"/> Priority _____		<input type="radio"/> Standby <input type="radio"/> Priority _____		<input type="radio"/> Standby <input type="radio"/> Priority _____
	<input type="radio"/> Standby <input type="radio"/> Priority _____		<input type="radio"/> Standby <input type="radio"/> Priority _____		<input type="radio"/> Standby <input type="radio"/> Priority _____		<input type="radio"/> Standby <input type="radio"/> Priority _____







# Real-time Statistics Collection worksheet

SCCS11

System Name	
-------------	--

Collect Statistic?	Statistic to be collected	Modes Select one or both from the list below.
<input checked="" type="checkbox"/>	Skillset statistics	<input type="checkbox"/> Moving Window <input type="checkbox"/> Interval to date
<input checked="" type="checkbox"/>	Nodal statistics	<input type="checkbox"/> Moving Window <input type="checkbox"/> Interval to date
<input type="checkbox"/>	Application statistics	<input type="checkbox"/> Moving Window <input type="checkbox"/> Interval to date
<input type="checkbox"/>	Agent statistics	<input type="checkbox"/> Moving Window <input type="checkbox"/> Interval to date

Data Collection Interval	hh:mm
One of the Intervals starts at:	(today)

Minimum Refresh Rate for Agent Real-time Displays	sec
Minimum Refresh Rate for Other Real-time Displays	sec

# Historical Statistics Collection worksheet

SCCS12 (1/2)

System Name	
-------------	--

Options			
Call Flows		Agent	
Applications	<input type="checkbox"/>	Performance	<input type="checkbox"/>
CDN	<input type="checkbox"/>	By-Application	<input type="checkbox"/>
Skillset	<input type="checkbox"/>	By-Skillset	<input type="checkbox"/>
Activity Codes	<input type="checkbox"/>	Login / Logout	<input type="checkbox"/>
DNIS	<input type="checkbox"/>		
Music/RAN Route	<input type="checkbox"/>		

Parameters	
Active Agents	Activity codes
Agent Positions	Agent events per day
Skillsets	RAN Routes
Calls per hour	Music Routes
DNISs	Applications
CDNs	Nodes
	IVR Ports

Duration (define the collection period for these statistics)	
Interval (days)	
Daily (days)	
Weekly (weeks)	
Monthly (months)	
Agent Login / Logout (days)	
First Business Day (day of week)	
Length of Business Day (hours)	
Business Week (days)	
Call by Call (days)	







# Reader Response Form

Nortel Networks Symposium Call Center Server  
Product release 5.0  
Setup Guide for DMS

**Tell us about yourself:**

**Name:** \_\_\_\_\_

**Company:** \_\_\_\_\_

**Address:** \_\_\_\_\_  
\_\_\_\_\_

**Occupation:** \_\_\_\_\_ **Phone:** \_\_\_\_\_

1. What is your level of experience with this product?  
 New user     Intermediate     Experienced     Programmer
2. How do you use this book?  
 Learning     Procedural     Reference     Problem solving
3. Did this book meet your needs?  
 Yes     No

If you answered No to this question, please answer the following questions.

4. What chapters, sections, or procedures did you find hard to understand?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
5. What information (if any) was missing from this book?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
6. How could we improve this book?  
\_\_\_\_\_  
\_\_\_\_\_  
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Please return your comments by fax to 353-91-756050, or mail your comments to Contact Center Documentation Research and Development Prime, Nortel Networks, Mervue Business Park, Galway, Ireland.



# Reader Response Form



# Nortel Networks Symposium Call Center Server

## for DMS Setup Guide

Nortel Networks  
Mervue Business Park  
Galway, Ireland

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