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Nortel Networks Symposium Call Center Web Client

Data Extraction Tool User's Guide
for the Meridian 1

Product release 4.0

Standard 1.0

April 2001

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Symposium Call Center Web Client

Data Extraction Tool User's Guide for the Meridian 1

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April 2001

This document is the first standard release of the *Symposium Call Center Web Client Data Extraction Tool User's Guide* for Release 4.0.

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Chapter 1

Installing the Meridian 1 Data Extraction Tool

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Overview

Introduction

The Meridian 1 Data Extraction Tool is a software application that extracts information about resources such as Terminal Numbers (TNs), voice ports, Controlled Directory Numbers (CDNs), Interactive Voice Response Automatic Call Distribution DN (IVR ACD-DN), and routes from a Meridian 1 (M1) switch. It then saves this information in Excel spreadsheets.

To save data entry time, you can use these Excel spreadsheets with the Symposium Call Center Web Client Configuration upload utility by copying the M1 switch data and pasting it into the Configuration spreadsheet templates that you download from the Symposium Web Client application.

Note: You cannot upload data from the M1 Data Extraction spreadsheets directly to Symposium Web Client. You must copy the data from the M1 Data Extraction spreadsheet into the Symposium Web Client Configuration spreadsheet and then upload the data. Symposium Web Client does not support uploading *directly* from the M1 Data Extraction spreadsheets.

For more information on Symposium Web Client Configuration spreadsheets, see the online Help for the Symposium Web Client Configuration component.

System requirements

Introduction

The Meridian 1 Data Extraction Tool runs on any PC that has Windows 95, Windows NT 4.0 Server, Windows NT 4.0 Workstation, or Windows 2000 Server installed.

Hardware requirements

The following table lists the minimum hardware configuration required to install and run the Meridian 1 Data Extraction Tool:

- a Pentium 166 MHz or better
- 32 Mbytes of RAM (for Windows 95), or 64 Mbytes of RAM (for Windows NT)
- 10 Mbytes of hard disk space
- an available serial port or modem

Note: If you install and run the Meridian 1 Data Extraction Tool on the Symposium Web Client application server, you must consult the *Symposium Web Client Planning, Installation, and Administration Guide* for the list of minimum hardware requirements for the application server.

Software requirements

The Meridian 1 Data Extraction Tool requires that Microsoft Excel 97 or higher be installed on the PC.

Installing the Meridian 1 Data Extraction Tool

Introduction

You can install the Meridian 1 Data Extraction Tool from the Symposium Web Client application CD using an automated setup program that guides you through the installation process from start to finish. The entire installation takes only a few minutes to complete. Once you have installed the software, you can immediately use the Meridian 1 Data Extraction Tool.

Note: When you install and use the Meridian 1 Data Extraction Tool on the client PC, the tool connects directly to the M1 switch through a serial port or a modem; it does not connect to the switch through a server.

To install the Meridian 1 Data Extraction Tool

- 1 Insert the Symposium Web Client CD into the computer.
- 2 Browse the CD contents and open the Meridian 1 Data ExtractionTool folder.
- 3 Double-click the Setup.exe file.

Result: The InstallShield starts and the Meridian 1 Data Extraction Tool Setup window appears.

Note: You can click **Cancel** at any time during the installation to exit the Setup program.



- 4 Click **Next**.

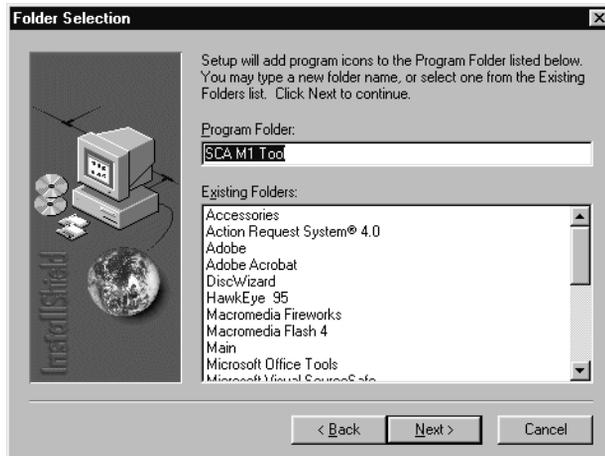
Result: The Choose Destination Location window appears.



- 5 Click **Next** to accept the default location shown.

Note: To install the software in another folder on your computer, click **Browse**, navigate to the desired folder, and then click **Next**.

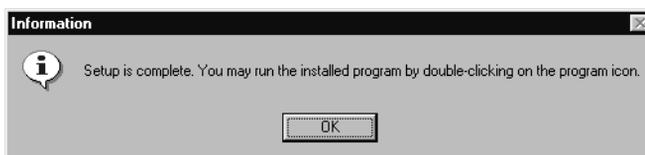
Result: The Folder Selection window appears.



- 6 Click **Next** to accept the default folder where the program icons are installed.

Result: The Setup program installs the software and informs you when it is complete.

Note: To install the program icons in another folder, type the folder name in the **Program Folder** box, or select the folder from the list shown, and then click **Next**.



- 7 Click **OK**.

Uninstalling the Meridian 1 Data Extraction Tool

Introduction

You can completely uninstall the Meridian 1 Data Extraction Tool using the Uninstaller program included with the software.

To uninstall the Meridian 1 Data Extraction Tool

- 1 Exit the Meridian 1 Data Extraction Tool if it is running.
- 2 From the Start Menu, select Programs > SCT M1 Tool > Uninstaller.

Result: The uninstall program asks if you are sure you want to uninstall the program.



- 3 Click **Yes**.

Result: The unInstallShield deletes all Meridian 1 Data Extraction Tool files and folders from your computer and notifies you when the process is complete.



- 4 Click **OK**.

Chapter 2

Using the Meridian 1 Data Extraction Tool

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Extracting data from the M1

Introduction

You can use the Meridian 1 Data Extraction Tool to connect to the M1 switch through an available serial port or modem, extract data about switch resources such as TNs, CDNs, and routes, and then save the data in an Excel spreadsheet.

You can also use a terminal emulator application, such as Microsoft's HyperTerminal utility, to connect to the M1 switch and capture an output data file containing the switch resource information. After saving the data as a text file on your computer, you can use the Meridian 1 Data Extraction Tool to export it into an Excel spreadsheet.

To save data entry time, you can use these Excel spreadsheets with the Symposium Web Client Configuration upload utility by copying the M1 switch data and pasting it into the Configuration spreadsheet templates that you download from the Symposium Web Client application.

Note: You cannot upload data from the M1 Data Extraction spreadsheets directly to Symposium Web Client. You must copy the data from the M1 Data Extraction spreadsheet into the Symposium Web Client Configuration spreadsheet and then upload the data. Symposium Web Client does not support uploading *directly* from the M1 Data Extraction spreadsheets.

For more information on Symposium Web Client Configuration spreadsheets, see the online Help for the Symposium Web Client Configuration component.

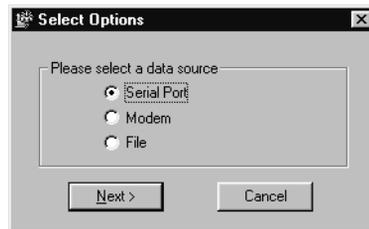
To extract data using a serial connection

You can extract data from the M1 switch through a serial connection using an available serial port on your computer.

Note: When you install and use the Meridian 1 Data Extraction Tool on the client PC, the tool connects directly to the M1 switch through the serial port; it does not connect to the switch through a server.

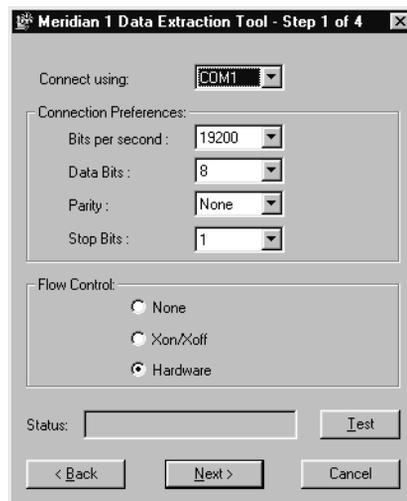
- 1 From the Start menu, choose Programs > SCT M1 Tool > Meridian 1 Data Extraction Tool.

Result: The Select Options window appears.



- 2 Select **Serial Port**, and then click **Next**.

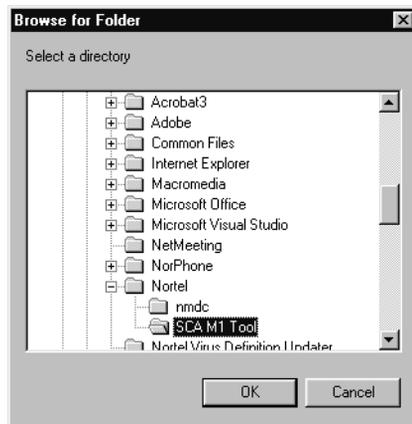
Result: The Meridian 1 Data Extraction Tool - Step 1 of 4 window appears.



- 3 Set your serial connection parameters:

Note: Your serial connection parameters must match the parameters of the M1 switch. Contact your switch administrator if you do not know which parameters to select.

- a. Select your available COM port in the **Connect using** drop-down list.



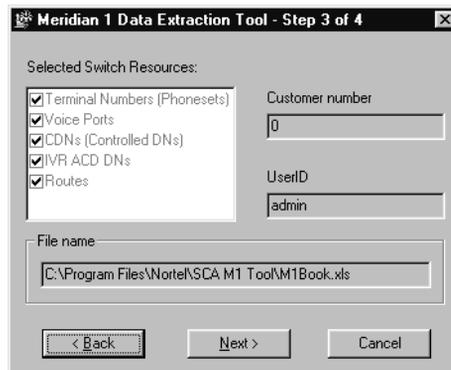
- 8 Accept the default selection or navigate to the folder of your choice.
- 9 Click **OK**.

Result: The path you select appears in the **File name** box.

- 10 Click **Next**.

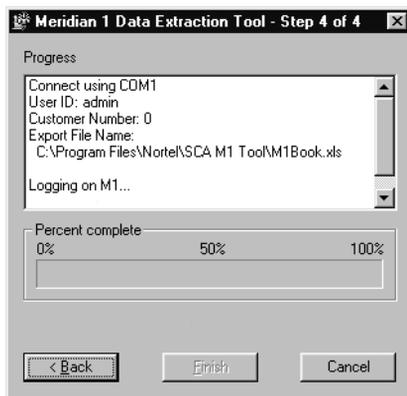
Note: If the system displays the Failed to logon dialog box, exit the Meridian 1 Data Extraction Tool, confirm your settings, restart the program by selecting Start > Programs > SCT M1Tool > Meridian 1 Data Extraction Tool, and attempt to log on again.

Result: The Meridian 1 Data Extraction Tool - Step 3 of 4 window appears, confirming your selected resources, user ID, and exported file name.



- 11 Click **Next** to download the data.

Result: The Meridian 1 Data Extraction Tool - Step 4 of 4 window appears, informing you of the progress of connecting to the M1 switch, retrieving the data, and exporting it to the Excel file.



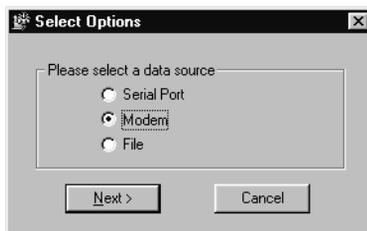
- 12 Click **Finish** when the data extraction is complete.

To extract data using a modem

You can extract data by using a modem to connect to the M1 switch.

- 1 From the Start menu, choose Programs > SCT M1 Tool > Meridian 1 Data Extraction Tool.

Result: The Select Options window appears.



- 2 Select **Modem**, and then click **Next**.

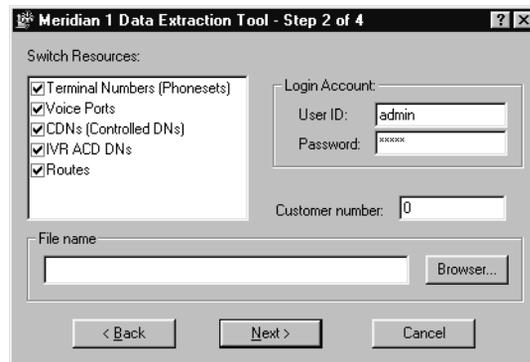
Result: The Meridian 1 Data Extraction Tool - Step 1 of 4 window appears.

The screenshot shows a dialog box titled "Meridian 1 Data Extraction Tool - Step 1 of 4". It contains the following fields and options:

- Connect using:** A drop-down menu with "Standard 28800 bps Modem" selected.
- Phone number:** A text box containing "995-1010".
- Connection Preferences:** A group box containing:
 - Bits per second:** A drop-down menu with "19200" selected.
 - Data Bits:** A drop-down menu with "8" selected.
 - Parity:** A drop-down menu with "None" selected.
 - Stop Bits:** A drop-down menu with "1" selected.
- Flow Control:** A group box containing three radio buttons:
 - None
 - Xon/Xoff
 - Hardware
- Status:** An empty text box.
- Test:** A button.
- Navigation:** Three buttons at the bottom: "< Back", "Next >", and "Cancel".

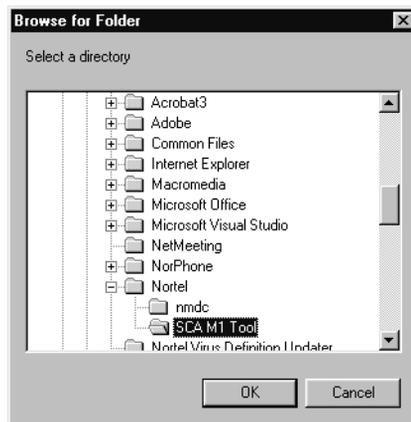
- 3 Set your modem connection parameters:
 - a. From the **Connect using** drop-down list, select the modem you want to use.
 - b. In the **Phone number** box, type the phone number used to connect to the modem at the M1 switch.

Tip: You can test your COM port by clicking **Test**. A message appears in the **Status** box informing you if your COM port is working.
 - 4 Click **Next**.
- Result:** The Meridian 1 Data Extraction Tool - Step 2 of 4 window appears.



- 5 Select the resources you want to download from the switch.
- 6 In the **Login Account** section, enter your user ID and password for the switch.
- 7 Click **Browser** to select the folder where you want to save your exported data.

Result: The Browse for Folder window appears with the default folder selected.

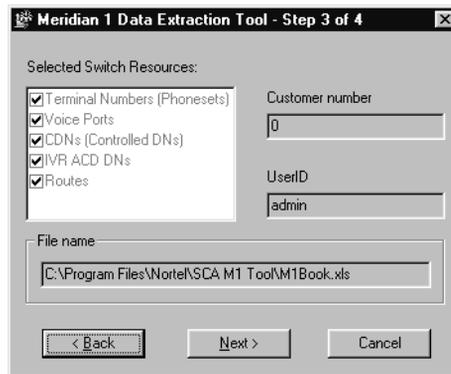


- 8 Accept the default selection, or navigate to the folder of your choice.
- 9 Click **OK**.

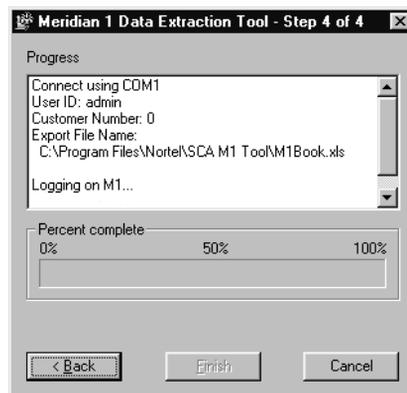
Result: The path you select appears in the **File name** box.

10 Click **Next**.

Result: The Meridian 1 Data Extraction Tool - Step 3 of 4 window appears, confirming your selected resources, user ID, and exported file name.

**11** Click **Next** to download the data.

Result: The Meridian 1 Data Extraction Tool - Step 4 of 4 window appears, informing you of the progress of connecting to the M1 switch, retrieving the data, and exporting it to the Excel file.

**12** Click **Finish** when the data extraction is complete.

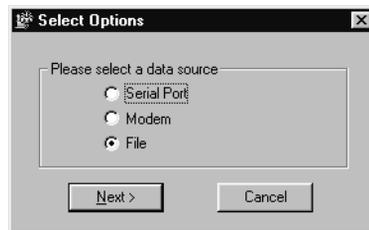
To extract data from a file

You can use the Extract from File option to extract data from an output file that you have captured from the M1 switch and saved on your computer.

Note: For details on capturing an output file from the M1 switch, see Appendix A, “Capturing the Meridian 1 data output.”

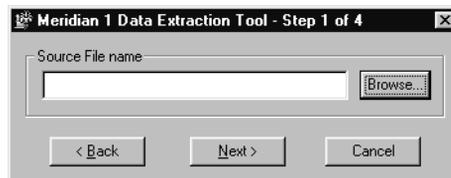
- 1 From the Start menu, choose Programs > SCT M1 Tool > Meridian 1 Data Extraction Tool.

Result: The Select Options window appears.



- 2 Select **File**, and then click **Next**.

Result: The Meridian 1 Data Extraction Tool - Step 1 of 4 window appears.

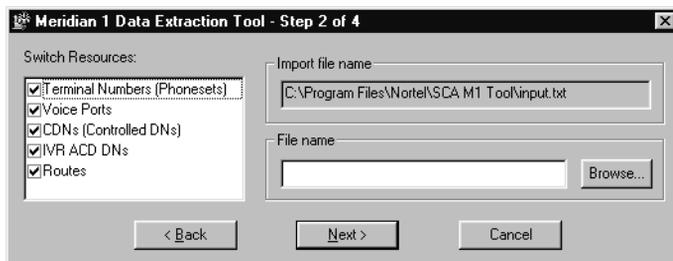


- 3 Enter the name of the file that contains the Meridian 1 Data.

Note: If you do not know the file name, click **Browse** to navigate to the file.

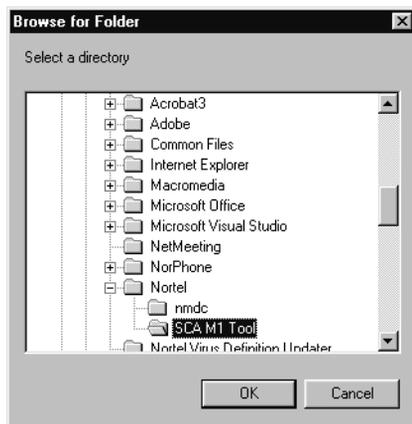
- 4 Click **Next**.

Result: The Meridian 1 Data Extraction Tool - Step 2 of 4 window appears.



- 5 Select the switch resources that you want to download from the file.
- 6 In the **File name** box, enter the path and file name, or click **Browse** to select the folder where you want to save your exported data.

Result: The Browse for Folder window appears with the default folder selected.



- 7 Accept the default selection, or navigate to the folder of your choice. Click **OK**.

Result: The path you select appears in the **File name** box.

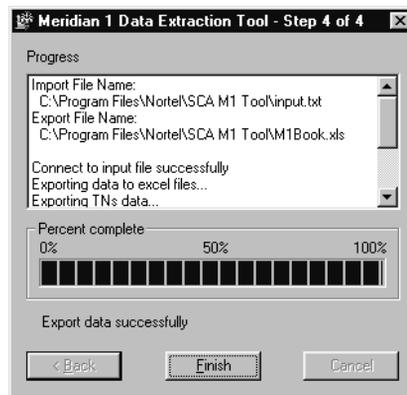
- 8 Click **Next**.

Result: The Meridian 1 Data Extraction Tool - Step 3 of 4 window appears, confirming your selected resources and the exported file name.



9 Click **Next**.

Result: The Meridian 1 Data Extraction Tool - Step 4 of 4 window appears, informing you of the progress of connecting to the output file, and exporting the data you selected to the Excel file.



10 Click **Finish** when the data extraction is complete.

Tip: You can now copy the data you extracted and paste it into the Symposium Web Client Configuration templates to save data-entry time. For more information, see the online Help for the Symposium Web Client Configuration component.

Note: You cannot upload data from the M1 Data Extraction spreadsheets directly to Symposium Web Client. You must copy the data from the M1 Data Extraction spreadsheet into the Symposium Web Client Configuration spreadsheet and then upload the data. Symposium Web Client does not support uploading *directly* from the M1 Data Extraction spreadsheets.

Error messages

Fail to connect

The “Fail to connect” message appears under the following conditions:

- If the “Fail to connect” message appears in the **Status** box when you verify the selected serial port in the Meridian 1 Data Extraction Tool - Step 1 of 4 window, then the serial port is either an invalid port, or it is being used by another application.

Select another serial port and try again.

- If the switch is not configured to allow multiple users to log on, the “Fail to connect” message appears in the **Status** box when you try to log on to the switch and a user is already logged on.

You must wait until the user is logged off, and then try to connect again. To prevent the problem from occurring again, contact your switch administrator to enable the multiple user logon feature.

Fail to log on

If the “Fail to logon. Try again” message appears in the Meridian 1 Data Extraction Tool - Step 4 of 4 window, then the user ID or password that you entered may be incorrect.

Click **Back** to return to the Meridian 1 Data Extraction Tool - Step 2 of 4 window, and verify that your user ID and password are correct before trying to log on again. If you still fail to log on, exit the Meridian 1 Data Extraction Tool, confirm your settings, restart the program by selecting Start > Programs > SCT M1 Tool > Meridian 1 Data Extraction Tool, and attempt to log on again.

If you still fail to log on after trying several times, use the HyperTerminal application to check if the connection between your PC and the M1 switch is working.

Appendix A

Capturing the Meridian 1 data output

In this appendix

Capturing the M1 data output

32

Capturing the M1 data output

Introduction

You can use a terminal emulator application such as Microsoft's HyperTerminal to connect to the M1 switch and extract data on Terminal Numbers (TNs), voice ports, Controlled Directory Numbers (CDNs), routes, and Interactive Voice Response Automatic Call Distribution Directory Numbers (IVR ACD-DNs).

Based on the type of data you want to capture, once you have connected to the switch, you must load an overlay program and type in the required commands to extract the data. You can choose from three overlay programs:

- Program 81 is used to download data on the TNs configured on the switch.
- Program 21 is used to download data on routes.
- Program 23 is used to download data on all CDNs and IVR ACD-DNs configured on the switch.

After you load the program and enter the commands, the switch displays the data you requested. To use the data with the Meridian 1 Data Extraction Tool, capture the data with the terminal emulator application and save it to your computer as a text file. For more information on using the file, see "To extract data from a file" on page 26.

To capture Terminal Number data

You can capture a list of all Terminal Numbers (TN) that are configured as agents (AGN), and those that are configured as supervisors (SPV), by entering the following commands when you are connected to the switch and loading Overlay program 81:

LD 81

REQ 1st

CUST x (where x is the Customer Number)

DATE

PAGE

DES

FEAT agn

FEAT spv

FEAT

An example of the output follows:

AGN 00 TN 010 0 00 09 SL1 00 MMAGT4 14 DEC 1998

SPV 00 TN 004 0 00 04 2000 00 LAB26 14 MAY 1999

To capture voice port data

You can capture a list of all voice ports that are configured as TNs on the switch by again using Overlay program 81. To separate voice ports from the other TNs, request only those TNs with the Voice Messaging Allowed (VMA) feature, as follows:

LD 81

REQ 1st

CUST x (where x is the Customer Number)

DATE

PAGE

DES

FEAT vma

FEAT

An example of the output follows:

```
VMA 00 TN 010 0 00 01 SL1 MMAIL NO DATE
VMA 00 TN 010 0 00 08 SL1 MMAIL 15 MAY 1997
```

To capture CDN data

You can capture a list of all of the CDNs by using Overlay program 23, as follows:

```
LD 23
```

```
REQ PRT
```

```
TYPE CDN
```

```
CUST x (where x is the Customer Number)
```

```
CDN
```

An example of the output produced after running Overlay program 23 with PRT option CDN on an Option 11C switch follows:

```
TYPE CDN
```

```
CUST 0
```

```
CDN 4911
```

```
FRRT
```

```
SRRT
```

```
....
```

```
ACNT
```

To capture IVR ACD-DN data

You can capture a list of all of the IVR ACD-DNs by using Overlay program 23, as follows:

LD 23

REQ prt

TYPE ACD

CUST x (where x is the Customer Number)

ACD

An example of the output from Option 11C for IVR ACD-DNs follows:

TYPE ACD

CUST 0

ACDN 6700

....

CWNT NONE

To capture route data

You can capture a list of all of the route numbers from the switch by using Overlay program 21, as follows:

LD 21

PRT RDB

ROUT

CUST

ACOD

Enter these commands to produce a list of route numbers.

Symposium Call Center Web Client

Data Extraction Tool User's Guide

for the Meridian 1

Toronto Information Products
Nortel Networks
522 University Avenue, 14th Floor
Toronto, Ontario, Canada
M5G 1W7

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