Nortel Networks Symposium Call Center Web Client

Data Extraction Tool User's Guide

for the Meridian 1

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Nortel Networks Symposium Call Center Web Client

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for the Meridian 1

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Chapter 1

Installing the Meridian 1 Data Extraction Tool

In this chapter

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 DNs (IVR ACD-DNs), 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 a PC that has any of the following operating systems installed:

- Windows 98

- Windows NT 4.0 Workstation

- Windows 2000 Server/Advanced Server/Professional

- Windows XP Professional

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

- 64 Mbytes of RAM (128 Mbytes of RAM recommended)

- 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 later 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 Extraction Tool 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**.
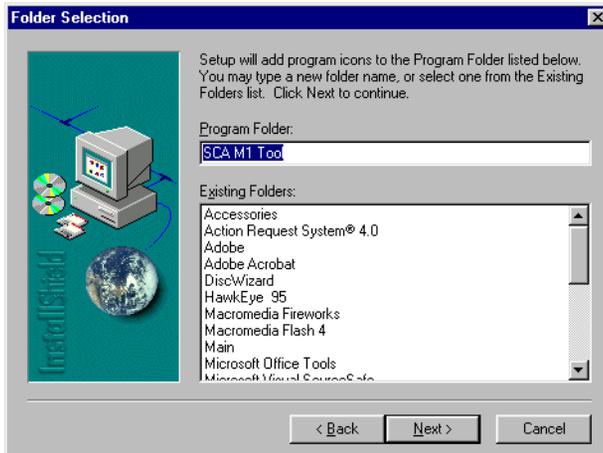
Result: The Choose Destination Location window appears.
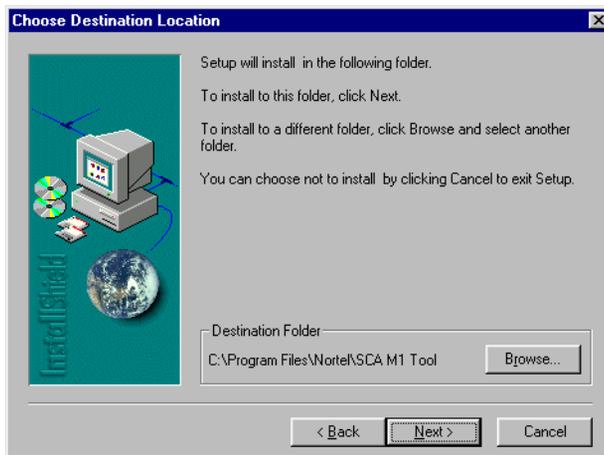
5   Click **Next** to accept the default location shown.

Note: To install the software in another folder on your computer, click **Browse**, navigate to the desired folder, and then click **Next**.
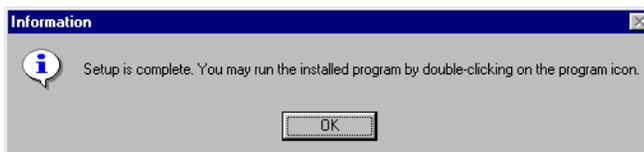
Result: The Folder Selection window appears.

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

In this chapter

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.
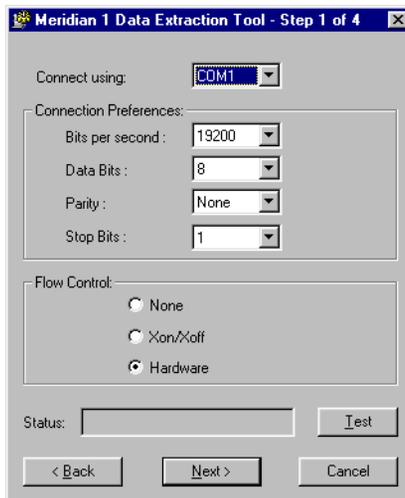
3   Set your serial connection parameters:

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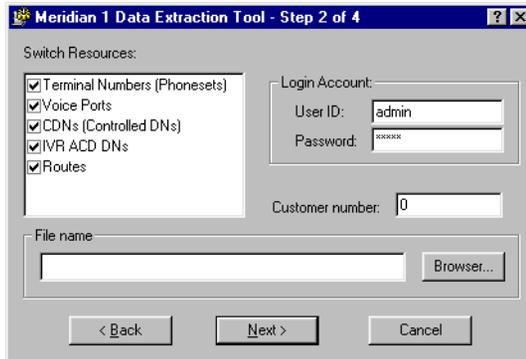
  a.   Select your available COM port in the **Connect using** drop-down list.

b. Select your settings in the **Connection Preferences** and **Flow Control** boxes.

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. The default user ID is "admin".

Note: Do not type Meridian 1 overlay commands in the **User ID** box. Type only your user ID for the Meridian 1 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**.

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 M1 Tool → 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.
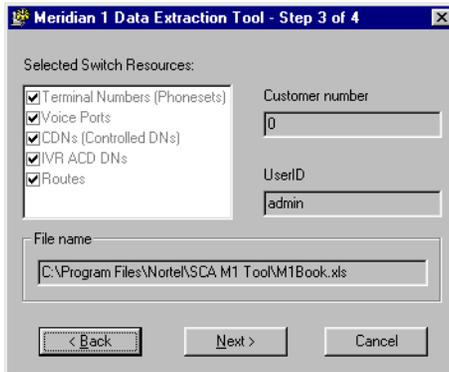
11   Click **Next** to download the data.

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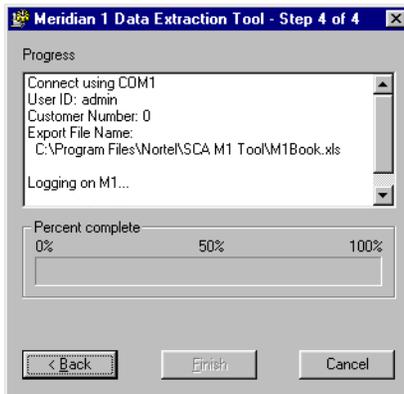
12   Click **Finish** when the data extraction is complete.

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.
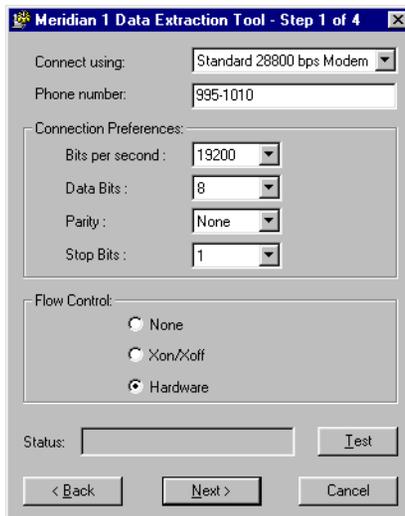
3   Set your modem connection parameters:

   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.
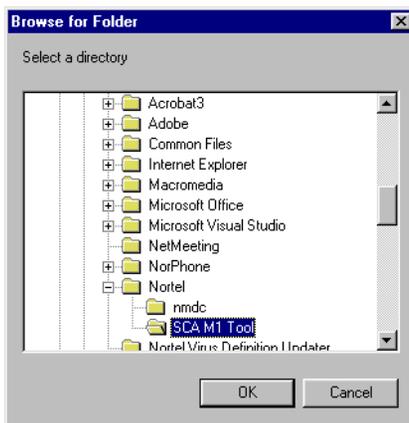
5   Select the resources you want to download from the switch.

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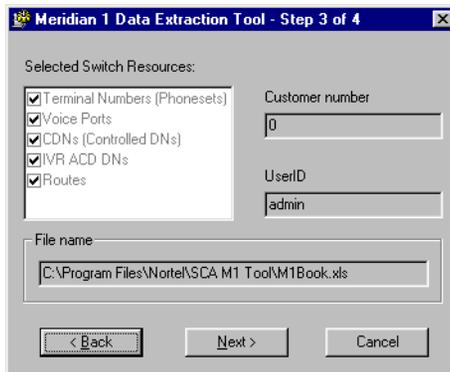
11   Click **Next** to download the data.

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.
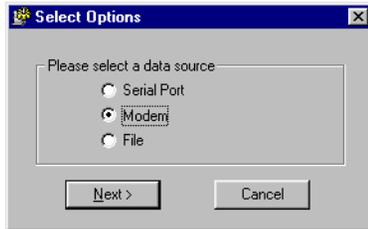

12   Click **Finish** when the data extraction is complete.
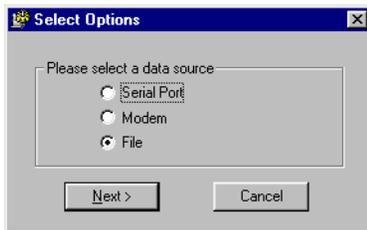
To extract data from a file

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" on page 31.
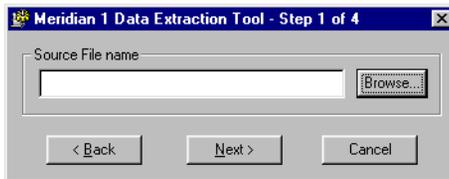
1   From the Start menu, choose Programs → SCT M1 Tool → Meridian 1 Data Extraction Tool.

Result: The Select Options window appears.

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

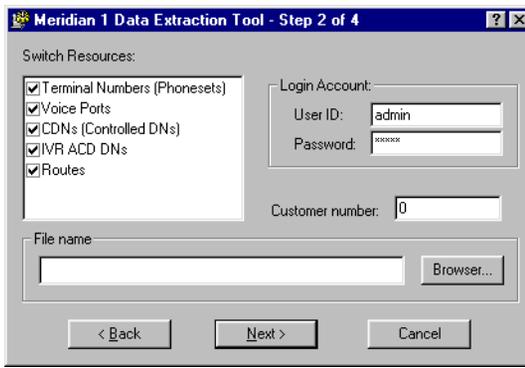**Result:** The Meridian 1 Data Extraction Tool - Step 1 of 4 window appears.

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.
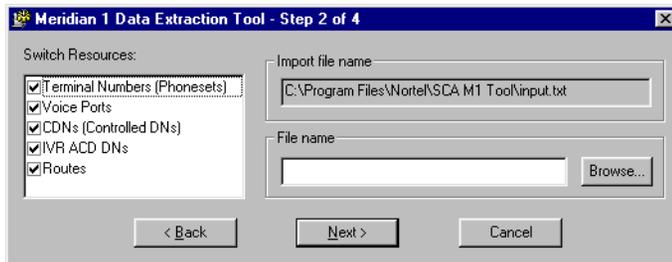
5   Select the switch resources that you want to download from the file.

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**.

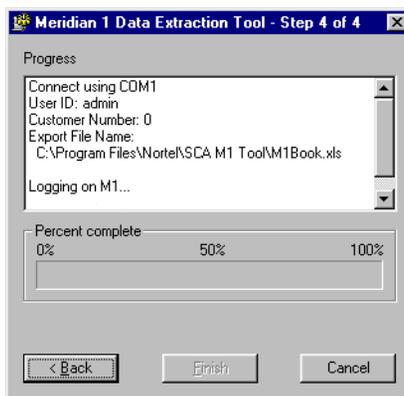 **Result:** The path you select appears in the **File name** box.

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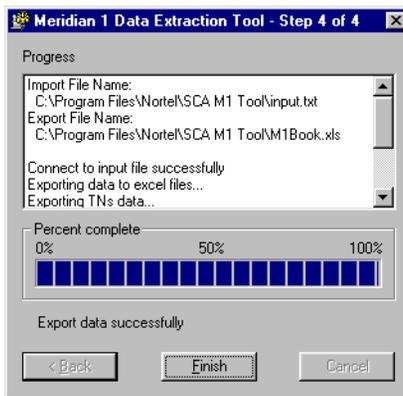
10 Click **Finish** when the data extraction is complete.

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

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 four overlay programs:

- Program 20 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.
- Program 81 is used to download data on voice ports.

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 by entering the following commands when you are connected to the switch and loading Overlay program 20:

LD 20

REG PRT

TYPE TNB

TN

CDEN

CUST x (where x is the Customer Number)

DATE

PAGE

DES

An example of the output follows:

DES LAB30

TN   002 0 00 00

TYPE 500

CDEN 4D

CUST 0

WRLS NO

DN   7050 0   MARP

  CPND

    NAME 500 set-1

    XPLN 9

    DISPLAY_FMT FIRST,LAST

AST NO

IAPG 0

HUNT

TGAR 0

LDN NO

NCOS 0

SGRP 0 RNPG 0

XLST

SCI 0

CLS UNR DTN FBD XFA WTA THFD FND HTD ONS

LPR XRA CWD SWD MWD RMMD SMWD LPD XHD CCSD LND TVD

CFTD SFD MRD C6D CNID CLBD AUTU

ICDD CDMD LLCN EHTD MCTD

GPUD DPUD CFXD ARHD OVDD AGTA CLTD LDTD ASCD

MBXD CPFA CPTA DDGA NAMA

MCRD

EXR0 SHL ABDD CFHD DNDY DNO3

CWND USMD USRD BNRD OCBD RTDD RBDD RBHD FAXD CNUD
CNAD PGND FTTU

PLEV 02

SPID NONE

PRI 01

AACD NO

AACS NO

MLWU_LANG 0

FTR CFW 16 FTR PHD

FTR ACD 3500 3204

AGN

DATE 8 MAR 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)

ACDN

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

REQ prt

TYPE rdb

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

ROUT

ACOD

Enter these commands to produce a list of route numbers.

Glossary

A

ACCESS voice port

A voice port that is controlled by the ACCESS link.

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.

administrator

A user who is responsible for setting up and maintaining Symposium Web Client.

application server

The computer hosting the web server that distributes all the web pages to the client PCs that are using Symposium Web Client. The client PCs use an Internet browser interface to connect to the application server, launch Symposium Web Client, and interact with Symposium Call Center Server. The application software for Symposium Web Client is installed on the application server.

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 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

CDN

See controlled directory number.

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. *See also* server.

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.

CSE 1000 switch

Succession Communication Server for Enterprise 1000 switch

D

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.

Each skillset has a defined default activity code.

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.

Digital Multiplex Switch

A Nortel Networks switch for the central office market.

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.

DMS
See Digital Multiplex Switch.

DN
See directory number.

DN call
See directory number call.

DNIS
See Dialed Number Identification Service.

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.

G   global settings
Settings that apply to all skillsets or IVR ACD-DNs that are configured on your system.

I   Interactive voice response
An application that allows telephone callers to interact with a host computer using prerecorded messages and prompts.

Interactive voice response ACD-DN
A directory number that routes a caller to a specific IVR application. An IVR ACD-DN must be acquired for non-integrated IVR systems.

Interactive voice response event
A voice port logon or logoff. An IVR event is pegged in the database when a call acquires or de-acquires a voice port.

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. For customers using NSBR, site IP addresses must be unique and correct. 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.

IP address

See Internet Protocol address.

IVR

See Interactive voice response.

IVR ACD-DN

See Interactive voice response ACD-DN.

IVR event

See Interactive voice response event.

IVR port

See voice port.

L

LAN

See Local area network.

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.

local call

A call that originates at the local site. *See also* network call.

M

M1

Meridian 1 switch

M1 IE
Meridian 1 Internet Enabled switch

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

Meridian Mail
A Nortel Networks product that provides voice messaging and other voice and
fax services.

Meridian MAX
A Nortel Networks product that provides call processing based on ACD routing.

MLS
See Meridian Link Services.

MM
See Meridian Mail.

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

NACD call
A call that arrives at the server from a network ACD-DN.

NCC
See Network Control Center.

network call
A call that originates at another site in the network. *See also* local call.

Network Control Center

The server in a Symposium Call Center Web Client system where NSBR is configured and where communication between servers is managed.

network call

A call that originates at another site in the network. *See also* local call.

Network Skill-Based Routing

An optional feature with Symposium Call Center Server that provides skill-based routing to multiple networked sites.

NSBR

See Network Skill-Based Routing.

P

personal directory number

A DN on which an agent can be reached directly, usually for private calls.

primary ACD-DN

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

R

RAN

recorded announcement

RAN route

See recorded announcement route.

recorded announcement route

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

round robin routing table

A routing table that queues the first call to the first three sites in the routing table, then the second three sites, then the third three sites, and so on, until an agent is reserved at one of the sites.

route

A group of trunks. Each trunk carries either incoming or outgoing calls to the switch. *See also* music route, RAN route.

routing table

A table that defines how calls are routed to the sites on the network.

S

secondary directory number

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

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.

Simple Mail Transfer Protocol

A TCP/IP protocol used to send messages from one computer to another on a network. This protocol is commonly used to determine the route for e-mail.

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

1. A system using Symposium Call Center Server that can be accessed using SMI. 2. A system using Symposium Call Center Server and participating in Network Skill-Based Routing.

skillset

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

SMTP

See Simple Mail Transfer Protocol.

SNMP

See Simple Network Management Protocol.

supervisor

A user who manages a group of agents.

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.

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 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.

T

TCP/IP

See Transmission Control Protocol/Internet Protocol.

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.

V

voice port
A connection from a telephony port on the switch to a port on the IVR system.

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Nortel Networks Symposium Call Center Web Client

Data Extraction Tool User's Guide
for the Meridian 1

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