P0910111

Nortel Networks Symposium Call Center Server

for the Meridian 1
Setup Guide

Product release 3.0 | Standard 1.0 | April 2000

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This document is the first standard release of the *Nortel Networks Symposium Call Center Server Setup Guide* for Release 3.0.

Contents

Chapter 1

Filling in the worksheets

In this chapter

Overview

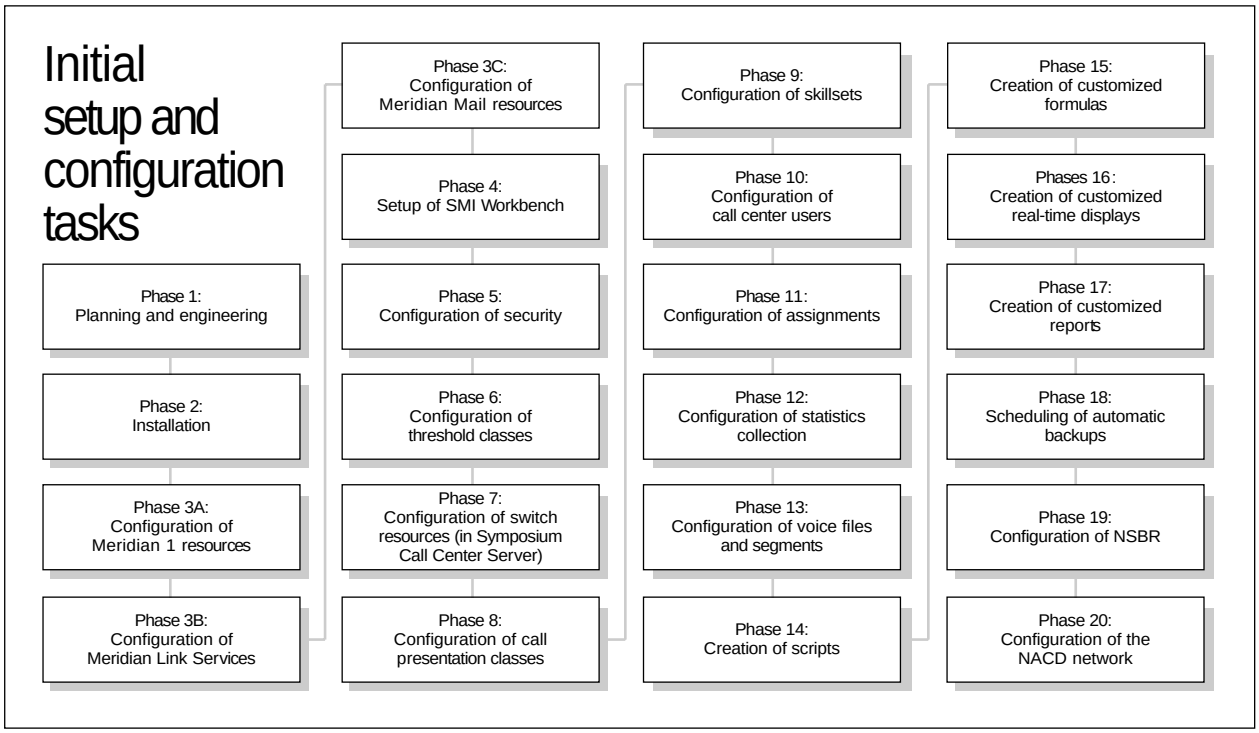
Introduction

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 a 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 and Phase 20, 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 SCCS-01 to SCCS-012.)

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 phoneset displays), as well as activity codes. 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 them to call presentation classes. 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 users to skillsets and supervisors you can define agent to skillset and agent to supervisor assignments. Reassignment can be used to cover such things as early morning and late evening periods, during lunch and coffee breaks, and for 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 will be stored on the server. You must also specify the applications for which call-by-call statistics will be stored. You configure statistics collection during Phase 12.

9. **Configuring network skill-based routing.** You must create network access classes. You must also set up routing tables and define the site parameters. This step is only valid if your Symposium Call Center Server is equipped for networking. You configure network skill-based routing during Phase 20.

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 will be of assistance when creating reports for the Symposium Call Center Server:

- Symposium Call Center Server
- Meridian 1

PC experience or knowledge

Knowledge of, or experience with, the following PC products will be of assistance when administering the Symposium Call Center Server:

- Microsoft Windows 95, Microsoft Windows 98, or Windows NT 4.0

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

In this section

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 might 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 SCCS-01.

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: Circle 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.

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

Completing the Desktop User worksheet

What are desktop users?

A desktop user account is an account that can use the client application to access the 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, SCCS-01.

Field descriptions

Complete the following fields on worksheet SCCS-02.

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 Symposium Call Center Server.

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

In this section

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:

- agents (defined in worksheet SCCS-03ag)
- skillsets (defined in worksheet SCCS-03sk)
- applications (defined in worksheet SCCS-03ap)
- IVR ACD-DNs (defined in worksheet SCCS-03ivr)
- routes (defined in worksheet SCCS-03rt)
- nodal template threshold (defined in worksheet SCCS-03cc)

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 might 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 SCCS-03 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, enter the value for the low end of the normal range. For pegging thresholds, specify a cut-off value for the statistic.

Level 2 threshold value

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

Section C: Switch Administration worksheets

In this section

Overview of switch administration worksheets

Introduction

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

Acquired resources

The Symposium Call Center Server must acquire the following switch resources:

- Controlled Directory Numbers (CDNs)
- phonesets
- IVR ACD-DNs
- voice ports
- routes

Note: The server must acquire a route if you want to be able to generate All Trunks Busy reports for that route.

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.

Phoneset displays

You can customize the appearance of agent phoneset displays—that is, you can customize the fields included on the display, and their order.

Other resources

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

- activity codes
- Dialed Number Identification Services (DNISs)

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 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.

How to use activity codes

To record an activity code during a call, agents press the Activity Code key and enter a 1- to 32-digit code. Multiple activity codes can be entered during a single call; for example, if a call changes from a "product inquiry" to an "order," the time spent on each function is recorded.

Managers can then generate reports to identify the time spent on different types of activities, such as product inquiries.

What are Not Ready reason codes?

A Not Ready reason code is a number that an agent enters on the phoneset keypad when going into Not Ready state. This number identifies the reason for the Not Ready state. The server uses the Not Ready reason codes to track the amount of time spent on various activities.

Default activity codes and skillsets

Each skillset can have a default activity code. If an agent does not record an activity code for a call, the server will peg the talk time against the default activity code for the skillset.

Where to look for more information

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

Field descriptions

Complete the following fields on worksheet SCCS-04ac.

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: Up to 32 digits

Completing the 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 the 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, M1, and Voice Processing Guide*.

Field descriptions

Record your system information in the following fields on worksheet SCCS-04cdn.

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 the 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: Up to 7 digits

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

CDN for Network Calls

Description: Specify whether this is a network CDN. A network CDN is a CDN to which other sites in your network route calls that they want to network out to your server.

Completing the 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.

How to use DNISs

Typically, DNISs are used for 1-800 numbers. For example, a company might 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. For more information, refer to the *Symposium, M1, and Voice Processing Guide.*

Field descriptions

Record your system information in the following fields on worksheet SCCS-04dnis.

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: Up to 7 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 Routes worksheet

What are routes?

A trunk route is a logical grouping of trunks with similar characteristics. Trunk route reports can detail statistics about customer service levels to better determine whether service goals are being met.

How do I use routes?

A route defines a group of trunks. Each trunk carries calls coming into and going out from the switch. If you want to create All Trunks Busy (ATB) reports for a route, the server must acquire that route.

Before you begin

- Complete the Route Threshold Class worksheet, SCCS-03rt.
- Configure the routes on the Meridian 1. For more information, refer to the *Symposium, M1, and Voice Processing Guide*.

Field descriptions

Record your system information in the following fields on worksheet SCCS-04rt.

Route Name

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

Format: Up to 30 characters

Route Number

Description: The route that should be acquired or deacquired by the switch.

Format: Use numbers from 0 to 511 for external routes.
Always use 999 for the internal route.

Note: Once the route has been created in Symposium Call Center Server, it cannot be modified.

Threshold Class

Description: The name of the threshold class that you want to assign to this route.

For more information: For a list of your system's threshold classes, refer to the route Threshold Class worksheet you completed.

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) on the switch. For more information, refer to the *Symposium, M1, and Voice Processing Guide.*

Field descriptions

Complete the following fields on worksheet SCCS-04ph.

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 address of the phoneset on the telephony server.

Format:

- Use the following format for Option 11: card-0-0-unit
- Use the following format for Meridian 1 other than Option 11: loop-shelf-card-unit

For example, 40-0-1-5

Valid ranges

Use digits within the following ranges for the loop, shelf, card, and unit:

- loop: 0 to 159
- shelf: 0 to 3
- card: 1 to 15

- unit: 0 to 31

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.

Completing the Phoneset Displays worksheet

What are phoneset displays?

A phoneset display is a the display area on an agent's phoneset where information about incoming calls can be communicated.

Note: The configuration applies to all phoneset displays of the same type. For example, if you configure a 1 x 16 alphanumeric phoneset display, the configuration applies to all displays of that type.

Phoneset displays come in different sizes. Four different worksheets are provided for the different types of displays:

- 1 x 40 Alphanumeric (SCCS-04pd1)
- 1 x 18 or 1 x 24 Alphanumeric (SCCS-04pd2)
- 1 x 16 Alphanumeric (SCCS-04pd3)
- 1 x 12 Numeric (SCCS-04pd4)

Where to look for more information

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

Before you begin

Configure the phoneset type on the Meridian 1. For more information, refer to the *Symposium, M1, and Voice Processing Guide*.

Field descriptions

Record your system information in the following fields on the appropriate worksheet for your phoneset display size.

Field name

Description: The names of the fields that can be displayed.

Field label

Description: Enter the title for this field, as you want it to appear on the phoneset. The title can be different from the field name.

Field width

Description: The number of characters of field data that you want to display (not including the Field Label).

Completing the IVR ACD-DNs worksheets

What is IVR?

Interactive Voice Response (IVR) provides an automated method of providing information to and receiving information from a caller by using computer-controlled voice playback to prompt for telephone or voice input.

What is an IVR ACD-DN?

An IVR ACD-DN is a directory number that routes a caller to a specific Interactive Voice Response (IVR) application. You must acquire an IVR ACD-DN for non-integrated IVR systems.

Where to look for more information

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

Before you begin

- Complete the IVR ACD-DN Threshold Class worksheet, SCCS-03ivr.
- Configure the IVR ACD-DNs, default Access treatment DNs, and default Access IVR DNs, and Meridian Mail mailboxes on the switch and in Meridian Mail. For more information, refer to the *M1, and Voice Processing Guide.*

Field descriptions

Record your system information in the following fields on worksheet SCCS-04ivr.

IVR ACD-DN Name

Description: The name of the IVR ACD-DN as you want it to appear in reports.

Format: Up to 30 characters

IVR ACD-DN Number

Description: The number that is passed to the switch to acquire or deacquire the IVR ACD-DN.

Format: Up to 7 digits

Threshold Class

Description: The name of the threshold class that you want to assign to this IVR ACD-DN.

For more information: For a list of your system's threshold classes, refer to the IVR ACD-DN Threshold Class worksheet that you completed.

Completing the IVR ACD-DN Global Settings worksheet

What are global settings?

Global settings are settings that apply to all IVR ACD-DNs that are configured on your system.

Field descriptions

Record your system information in the following fields on worksheet SCCS-04gl.

Number of IVR Ports Reserved for Broadcasts

Description: The total number of IVR ports that can be user-controlled for broadcast at any time.

Format: A number from 1 to 96

Broadcast Voice Port Wait Timer

Description: The maximum amount of time, in seconds, that you want the system to wait for a voice port to become available.

Default Access Treatment DN

Description: The default treatment DN to use when a script contains voice processing commands but does not explicitly state a treatment DN (for example, Give IVR).

Default Access IVR DN

Description: The default IVR ACD-DN to use when a script contains voice processing commands that may take an IVR ACD-DN as a parameter, but does not specify an IVR DN.

Mailbox

Description: The Meridian Mail mailbox where the voice segments for broadcast are stored.

Format: 2 to 18 digits

Password

Description: The current password of the Meridian Mail mailbox where the voice segments are stored.

Format: 4 to 16 digits

Completing the Voice Ports worksheet

What is a voice port?

A voice port is the connection point within the switch that can support either analog or digital devices used by voice processing systems. For Meridian Mail, define a voice port as an RCS (517 or 2009) phoneset on the PBX. For third-party IVR systems, define the voice port as a 2500 phoneset.

Where to look for more information

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

Prerequisite

- Configure the TN (the physical port address of the voice port on the switch).
- Configure the voice port in Meridian Mail. For more information, refer to the *Symposium, M1, and Voice Processing Guide.*

Field descriptions

Record your system information in the following fields on worksheet SCCS-04vp.

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 address of the phoneset on the telephony server.

Format:

- Use the following format for Option 11: card-0-0-unit
- Use the following format for Meridian 1 other than Option 11: loop-shelf-card-unit

For example, 40-0-1-5

Valid ranges

Use digits within the following ranges for the loop, shelf, card, and unit:

- loop: 0 to 159
- shelf: 0 to 3
- card: 1 to 15
- unit: 0 to 31

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 number that is passed to the telephony server in requests to acquire or deacquire the voice channel.

Format: Enter a number from 1 to 8999

Restriction: A voice port channel cannot be changed once it has been saved. To change the voice port channel, you must delete the voice port and then recreate it with the new channel.

Section D: Call Presentation Classes worksheet

In this section

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
  - automatically answered on an agent phoneset after they have been in the system for a specified period of time. Agents need not press the Incalls key to accept the call.
  - 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
- whether the agent is provided with a break between calls and if so, how long the break is to be
- whether agents can place directory number (DN) calls on hold to answer incoming calls

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 SCCS-05.

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:

- **Call Force Timer Delay:** Choose this type to "force" calls upon an agent if they have not been answered within the specified amount of time.
- **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.

After call, break for... seconds

Description: Check this field if you want to set a break time between calls to an agent phoneset. If you check this option, specify the amount of time, in seconds, that you want to pause before the next call is presented.

Answer call by placing DN on hold

Description: Check this field if you want to allow agents to place DN calls on hold to answer an incoming call.

Display Agent Reserved for Network Call

Description: Check this field if you want to show that an agent has been reserved to answer a network call.

Section E: Skillset worksheets

In this section

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.
- Complete the Activity Codes worksheet, SCCS-04ac.
- 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, M1, and Voice Processing Guide*.

Field descriptions

Complete the following fields on worksheet SCCS-06.

Skillset Name

Description: Required. The name of the skillset.

Format: Up to 30 characters, without spaces

Default Activity Code

Description: The activity code to be used for calls to this skillset if no activity code is entered by the agent.

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 Request Queue Size

Description: (Network skillsets only) The maximum number of external network calls that can be queued to a network skillset. When the number of queued calls reaches this number, your server is filtered out of routing tables at all other sites.

Flow Control Threshold

Description: (Network skillsets only) The number by which queued calls for this skillset must decrease before filtering of your server stops.

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.

Call source preference

Description: (Network skillsets only) Determines whether network or local calls are given priority for this skillset.

- **Network:** Choose this option to give priority to network calls. If a local and a network call have the same priority (as assigned in the script), then the network call is presented first.
- **Local:** Choose this option to give priority to local calls. If a local and a network call have the same priority (as assigned in the script), then the local call is presented first.

Completing the Skillset Global Settings worksheet

Field descriptions

Complete the following fields of worksheet SCCS-07.

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 location of the announcement that is played to callers if the skillset is out of service or there are no available agents to take the call.

Agent Preference

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

Options:

- **Idle time 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.
- **Idle time 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.)
- **Idle time since last Symposium/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.

Section F: Call Center User Configuration worksheets

In this section

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 SCCS-08a, 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.

Personal DN

Description: The supervisor's personal directory number. This is the number that internal or external callers can use to dial the supervisor directly.

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, SCCS-03ag.
- Complete the Call Presentation Class worksheet, SCCS-05.
- Complete the Access Classes worksheet, SCCS-01.
- Complete the Skillsets worksheets, SCCS-06.

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.

Comments

Description: Optional. Additional information about the agent.

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: 16 digits

Personal DN

Description: The agent's personal directory number. This is the number that can be used by internal or external callers to dial the agent directly.

Call Presentation properties

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

Thresholds properties

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

Primary supervisor this agent reports to

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

Other supervisors associated with this agent

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

Section G: Assignment worksheets

In this section

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 might 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 might 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 (SCCS-06)
- Skillset Global Settings (SCCS-07)
- Agent Configuration (SCCS-08b)

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 SCCS-09.

Assignment name

Description: The name of the agent to skillset assignment.

Format: Up to 30 characters

Section A: Agents

Agent Name

Description: The names of the agents whose skillset settings are to be altered when this assignment is run.

Skillset Name

Description: The skillsets to which these agents are 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 has the skillset and is taking calls at a priority of 1 (highest) through 48 (lowest).

Section B: Schedule

Use this section of the worksheet to indicate when you want this assignment to be run. Circle 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 (SCCS-08a)
- Agent Configuration (SCCS-08b)

Where to look for more information

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

Field descriptions

Complete the following fields on worksheet SCCS-10.

Section A: General Properties

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.

Section B: Schedule Assignments

Use this section of the worksheet to indicate when you want this assignment to be run. Circle the schedule type (Once, Daily, Weekly, Monthly, or Yearly, or Unscheduled). Then, indicate the following, if applicable:

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

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 Configuration worksheet

Field descriptions

Record your system information in the following fields on worksheet SCCS-11.

Section A: Statistics data

Statistics 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 call center summary 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 54.

Section B: Interval-to-date

Data collection interval

Description: The duration for each real-time statistics interval in increments of 15 minutes.

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

Section C: Minimum Refresh Rates

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 SCCS-12.

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
- trunk
- route
- music/RAN route
- network in call
- network outcall

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

IVR

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

- ACD-DN
- voice port
- voice port 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.

IVR ACD-DNs

Description: The number of IVR ACD-DNs 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.

Routes

Description: The number of routes configured on the system.

RAN Routes

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

Music Routes

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

Trunks

Description: The number of trunks 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 is stored by the system.

Agent login and logout

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

First business day of the week

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 contains

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. For each application, specify whether you are collecting local or network statistics.

Section I: Network Configuration worksheets

In this section

Overview of Network Configuration worksheets

Introduction

The Network Control Center (NCC) is a server in the Symposium Call Center Server network. However, unlike the other Symposium Call Center Servers, it performs no call routing or processing. Instead, it is responsible for

- managing communication between servers
- configuring the network
- propagating networking configuration information
- validating servers
- collecting network call-by-call statistics (statistics recording call events occurring at the destination site)
- producing consolidated and networking reports

The NCC contains a database that lists all of the other servers in the network, their IP addresses, and their status. It also polls each server regularly (every five minutes), to make sure it is accessible. When the configuration changes, the NCC sends the new configuration information to each server.

Configuring the network

From the NCC, you must perform these tasks to enable network skill-based routing:

- Configure network skillsets — skillsets shared by all sites in the network.
- Configure sites — servers to which network calls can be presented.
- Configure routing tables — the tables that determine the order of sites to which a call will be presented.

When created or modified, this configuration information is propagated to all servers in the network.

Where to look for more information

For more detailed information about network configuration, you should refer to the *Network Control Center Administrator's Guide.*

Completing the NBConfig worksheet

Introduction

On the NCC, you must configure the communications database. The communications database lists all of the servers in the network and their IP addresses. The NCC distributes the information to all of the servers in the network, to enable communication and network skill-based routing among multiple sites.

Use the NCC-01 worksheet to record your server data.

Field descriptions

Site name

Description: The name of the site (server) that is part of the network call center.

ELAN IP Address

Description: The IP address for the site.

Completing the Network Access Classes worksheets

Introduction

This section explains how to complete the Network Access Classes worksheet. You use the Network Access Classes worksheet to control access to the Network Control Center (NCC). Only Desktop users are applicable at the NCC. Agents and supervisors are not applicable at the NCC.

Field descriptions

Complete the following fields on worksheet NCC-02.

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 Class

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

- **N**—None
- **V**—View
- **E**—Edit
- **C**—Create/Delete

For a description of the functions and the access levels available for them, refer to the *Administrator's Guide*.

Completing the Network Sites worksheet

Introduction

The list of sites in the network of Symposium Call Center Servers in configured at the NCC. Data is propagated to each site in the list. A maximum of 30 sites are allowed in the network.

Field descriptions

Record your system information in the following fields on worksheet NCC-03.

Site Name

Description: The name of the site that is configured during the installation.

Filter Timer

Description: The length of time to filter a site from all Routing Tables during certain abnormal conditions.

Default: 5 minutes

Maximum: 12 hours

Time zone relative to GMT

Description: The time difference (in hours) between GMT and the time zone in which the site is located. This information is used in network call-by-call statistics to convert times for events occurring at other sites to the local time and for time zone conversion in consolidated reports.

Default: GMT

Site Contact Person

Description: Contact information for the site.

Site Contact Phone Number

Description: The phone number for the site contact.

Network Skillset

Description: The name of the network skillset. There can be a maximum of 50 network skillsets in the network.

Routing Table

Description: The method of routing used for this skillset. The method can be

- sequential
- round-robin

Routing Table (Selected Sites)

Description: The list of network sites that this skillset routes to. Routing tables can have a maximum of 20 sites per network skillset.

Completing the Table Routing Assignments worksheet

Introduction

When you configure a site, you define a routing table for each network skillset at that site. The routing table determines the sites to which a call for that skillset is routed.

When you need to change a routing table, you can change it manually. However, if you need to change a routing table regularly—for example, as sites in different time zones become or cease to be available during regular business hours—you can set up routing table assignments. You can apply these assignments manually, or schedule them to occur regularly at a specific time.

Field descriptions

Record your system information in the following fields on worksheet NCC-04.

Source Site Name

Description: The name of the site for which you are defining this assignment.

Comments

Description: Optional information about the assignment. A common comment would describe when the assignment applies.

Network Skillset

Description: The name of the network skillset. There can be a maximum of 50 network skillsets in the network.

Routing Table (Selected Sites)

Description: The list of network sites that this skillset routes to. Routing tables can have a maximum of 20 sites per network skillset.

Completing the Site Parameters worksheet

Introduction

You must configure the following network communication parameters on each server (site) in the network:

- the DN your switch dials to route a call to that site
- how many times your server will try to queue calls to the site, after a route attempt fails, and the number of seconds between retries
- the amount of time an agent at the site will be reserved to answer a call routed from your server

Field descriptions

Record your system information in the following fields on worksheet NCC-05.

Site Name

Description: The name of the site for which you are defining the parameters.

Dialable DN

Description: The number (including any required prefixes) that your switch dials to reach the network CDN on which the remote site accepts incoming network calls from your server.

Number of Retries

Description: The number of times that your server attempts to route a call to a reserved agent at this site before filtering the site out of the routing table.

Retry Interval

Description: The time that elapses before the server attempts to queue a call to this site after a route attempt fails (for example, if all trunks are busy).

Agent Reserve Timer

Description: The number of seconds an agent at this site is reserved when your site attempts to send a call. If the source site cannot cancel the agent reservation, it expires after this period.

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.

ACCESS link

A communication channel between the Symposium Call Center Server and Meridian Mail.

ACCESS voice port

A Meridian Mail 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 routing table

See Automatic call distribution routing table.

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

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. 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 maintaining the Symposium Call Center Server.

agent
A user who is responsible for handling customer calls.

agent login ID
A unique identification number assigned to a particular agent. The agent uses this number when logging in. 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.

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.

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 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.

Automatic call distribution directory number

DNs associated with an ACD group. Calls made to these DNs are distributed to agents belonging to the group, based on the ACD routing table on the switch.

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.

C

call age

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

call destination

The site to which an outgoing network call is sent. *See also* call source.

call intrinsic

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

call presentation class

A collection of preferences that determines how calls are presented to an agent. A call presentation class specifies whether a break time between calls is allowed, whether an agent can put DN calls on hold for incoming ACD calls, and whether an agent phoneset displays that the agent is reserved for a network call.

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 source

The site from which an incoming network call originates. *See also* call destination.

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, variable.

Calling Line Identification

This is 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.

CDN

See controlled directory number.

CLAN
See Customer local area network.

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. *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.

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.

Customer local area network
The LAN to which your corporate services and resources connect. The Symposium Call Center Server and 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. Each skillset has a defined default activity code.

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 the Symposium Call Center Server from a client PC.

destination site

The site to which an outgoing network call is sent. *See also* source site.

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.

DN
See directory number.

DN call
See directory number call.

DNIS
See Dialed Number Identification Service.

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. A DLL can be used by several applications at the same time.

E

ELAN
See embedded local area network.

embedded local area network
A dedicated Ethernet TCP/IP LAN that connects the 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 the 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, and relational expression.

F

filter timer

The length of time after the system unsuccessfully attempts to route calls to a destination site, before that site is filtered out of a routing table.

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 outside this value.

G

global settings

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

global variable

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

I

Incalls key

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

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 login or logout. 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.

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, and traffic intrinsic.

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.

local skillset
A skillset that can be used at the local site only. *See also* network skillset, skillset.

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

M

M1
Meridian 1 switch

master script
The first script executed when a call arrives at the 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* network script, primary script, script, and 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, and relational expression.

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.

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 on a Symposium Call Center Server system where NSBR is configured and where communication between servers is managed.

network script

The script that is executed to handle error conditions for Symposium Call Center Server calls forwarded from one site to another, for customers using NSBR. The network script is a system-defined script provided with Symposium Call Center Server, but it can be customized by an authorized user. It can be deactivated but not deleted. *See also* master script, primary script, script, and secondary script.

Network Skill-Based Routing

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

network skillset

A skillset that is common to every site on the network. Network skillsets must be created at the Network Control Center (NCC).

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.

NSBR

See Network Skill-Based Routing.

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.

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* local skillset, network skillset, and skillset.

P

PBX
See private branch exchange.

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.

personal directory number

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

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.

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, network script, script, and secondary script.

private branch exchange

A telephone switch, typically used by a business to service its internal telephone needs. A PBX usually offers more advanced features than are generally available on the public network.

R

RAN

recorded announcement

RAN route

See recorded announcement route.

RAS

See Remote Access Services.

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, and 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.

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.

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. *See also* sequential routing table.

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. *See also* round robin routing table, sequential routing table.

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, network script, primary script, and 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 script
Any script (other than a master, network, 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, network script, primary script, and script.

sequential routing table
A routing table method that always queues a call to the first three active sites in the routing table. *See also* round robin routing table.

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. The 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 set of protocols for managing complex networks. SNMP works by sending messages, called protocol data units (PDUs), to different parts of a network and then analyzing the responses.

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. *See also* local skillset, network skillset.

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, and 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.

source site

The site from which an incoming network call originates. *See also* destination site.

standby

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

supervisor

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

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 the Symposium Call Center Server. The call is presented to the Incalls key on an agent's phoneset.

system-defined scripts

The Master_Script and the Network_Script (if NSBR is enabled).These scripts can be customized or deactivated by a user, but cannot be deleted. These scripts are the first scripts executed for every local or network call arriving at the call center.

T

target site
See destination site.

TCP/IP
See Transport Control Protocol/Internet Protocol.

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.

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 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, and 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, and 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.

Transport 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.

trunk

A communications link between a PBX and the public central office, or between PBXs. Various trunk types provide services such as Direct Inward Dialing (DID trunks), ISDN, and Central Office connectivity.

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 the Symposium Call Center Server. *See also* call variable, global variable.

voice port

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

W

WAN

See 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 the Symposium Call Center Server.

Index

E

F

G

H

I

L

M

N

O

P

R

S

T

U

V

W

Appendix A

Worksheets

Access Classes worksheet

SCCS01 (1/2)

System Name	
Comments:	

Indicate the access privileges for each of the items on the system tree.					
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
Voice Prompt Editor	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 VU EU EUC	N VR VRE EA VU EU EUC	N VR VRE EA VU EU EUC	N VR VRE EA VU EU EUC	N VR VRE EA VU EU EUC
Backup Scheduler	N V E C	N V E C	N V E C	N V E C	N V E C
Backup Devices	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
Phoneset Displays	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
IVR ACD-DNs	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
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	N VO VOD VA VAD	N VO VOD VA VAD	N VO VOD VA VAD	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 Threshould 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
IVR ACD-DNs Threshold Classes	N V E C	N V E C	N V E C	N V E C	N V E C
Route Threshold Classes	N V E C	N V E C	N V E C	N V E C	N V E C
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
Network Communication Parameters	N V E	N V E	N V E	N V E	N V E
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

Desktop User Configuration worksheet

SCCS02 (1/1)

System Name

Properties

User Name (first name last name)	Title	Department	Language	User ID	Access Class
Comments:					
Comments:					
Comments:					
Comments:					
Comments:					
Comments:					
Comments:					
Comments:					
Comments:					

P090111

SCCS03ag (1/1)

Agent Threshold Class worksheet

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						
Logout	Display						
Not Ready	Display						
On Hold	Display						
Reserve	Display						
Walkaway	Display						

P090111

Application Threshold Class worksheet

SCCS03ap (1/1)

System Name	

Threshold Class Name					
Threshold	Threshold Type	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				
Network Out Calls	Display				
Network Out Calls Abandoned	Display				
Network Out Calls Abandoned Dly	Display				
Network Out Calls Answd	Display				
Network Out Calls Answd Dly	Display				
Network Out Calls Waiting	Display				
Service Level Threshold	Pegging				
Short Call	Pegging				
Waiting Time	Pegging				

P090111

IVR ACD-DN Threshold Class worksheet

SCCS03ivr (1/1)

System Name					
Threshold Class Name					
Threshold	Threshold Type	Level 1 threshold value	Level 2 threshold value	Level 1 threshold value	Level 2 threshold value
%Service Level for Ans Calls	Display				
Average_Answer_Delay_IVR	Display				
Calls Answered	Display				
Calls Answd Aft Threshold	Display				
Calls Answered Delay	Display				
Calls Not Treated	Display				
Calls Not Treated Aft Threshold	Display				
Calls Not Treated Delay	Display				
Calls Waiting	Display				
Service Level Threshold	Pegging				
Short Call	Pegging				

P090111

Route Threshold Class worksheet

SCCS03rt (1/1)

System Name					
Threshold Class Name					
Threshold	Threshold Type	Level 1 threshold value	Level 2 threshold value	Level 1 threshold value	Level 2 threshold value
All Trunks Busy Time	Display				
Service Level Threshold	Pegging				
Short Call	Pegging				

P090111

Skillset Threshold Class worksheet

SCCS03sk (1/1)

System Name

Threshold Class Name					
Threshold	Threshold Type	Level 1 threshold value	Level 2 threshold value	Level 1 threshold value	Level 2 threshold value
%Service Level for Ans Calls	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 Incall	Display				
Agent on NACD-DN Call	Display				
Agent on Network call	Display				
Agent on Other Skillset Call	Display				
Agent on This Skillset call	Display				
Agent Unavailable	Display				
Average_Answer_Delay_S	Display				
Call Answd Aft Threshold	Display				
Calls Answered	Display				
Calls Waiting	Display				
Expected Wait Time	Display				
Largest Wait Time Since last call	Display				
Longest Wait Since Login	Display				
Max Wait Time	Display				
Network Calls Answered	Display				
Network Calls Waiting	Display				
Service Level Threshold	Pegging				
Total Answered Delay	Display				
Total Wait Time	Display				

P090111

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		
Network In Calls Answered	Display		
Network In Calls Offered	Display		
Network In Calls Waiting	Display		

P090111

Activity Codes worksheet

SCCS04

System Name	

Activity Code Name (e.g., Vacations)	**Activity Code Number** (e.g., 430)

P090111

Controlled Directory Numbers (CDNs) worksheet

SCCS04cdn

System Name	

CDN Name (e.g., CDN_Main)	**CDN Number** configured on switch	**Network CDN for incoming calls only**
		☐
		☐
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P090111

Dialed Number Information Services (DNISs)

SCCS04dnis

System Name	

DNIS Name (e.g., Gold_Customers)	**DNIS Number** as configured on the switch	**Service Level Threshold** (e.g., 20)

P090111

Routes worksheet

SCCS04rt

System Name	

Route Name (e.g., Route1)	**Route Number** as configured on the switch	**Threshold Class**

P090111

Phonesets worksheet

SCCS04ph

System Name

Terminal Name (e.g., Set 7-6-6-6)	**Telephony/port address**

P090111

Phoneset Display worksheet (1 x 40 Alphanumeric)

SCCS04pd (1/2)

System Name	

Field name	Field label	Field Width
CLID Name		
CLID Number		
DNIS Name		
DNIS Number		
Route Name		
Route Number		
Skillset Name		
Skillset Queue Time		
Source CDN Name		
Source CDN Number		
Trunk Member		

Phoneset Display worksheet (1 x 24 and 1 x 18 Alphanumeric)

SCCS04pd

System Name	

Field name	Field label	Field Width
CLID Name		
CLID Number		
DNIS Name		
DNIS Number		
Route Name		
Route Number		
Skillset Name		
Skillset Queue Time		
Source CDN Name		
Source CDN Number		
Trunk Member		

Phoneset Display worksheet (1 x 16 Alphanumeric)

SCCS04pd(2/2)

System Name	

Field name	Field label	Field Width
CLID Name		
CLID Number		
DNIS Name		
DNIS Number		
Route Name		
Route Number		
Skillset Name		
Skillset Queue Time		
Source CDN Name		
Source CDN Number		
Trunk Member		

Phoneset Display worksheet (1 x 12 Alphanumeric)

SCCS04pd

System Name	

Field name	Field label	Field Width
CLID Name		
CLID Number		
DNIS Name		
DNIS Number		
Route Name		
Route Number		
Skillset Name		
Skillset Queue Time		
Source CDN Name		
Source CDN Number		
Trunk Member		

IVR ACD-DN worksheet

SCCS04ivr

System Name	

IVR ACD-DN Name (e.g., General_Inquiries)	**IVR ACD-DN Number** as configured on the switch	**Threshold Class**

P090111

IVR ACD-DN Global Settings worksheet SCCS04gl

System Name	

Number of IVR Ports Reserved for Broadcasts	
Broadcast Voice Port Wait Timer	
Default Access Treatment DN	
Default Access IVR DN	
Meridian Mail as configured on Meridian Mail and on the Meridian 1	
Mailbox	
Password	

P090111

Voice Ports worksheet

SCCS04vp

System Name			

Terminal Name	Telephony/port address	Voice Port Name	Voice Port Channel

P090111

Call Presentation Classes worksheet

SCCS00

System Name

Call Presentation Name (e.g., Gold_Agents)	Call Presentation Type: Choose one of the three options and select the time interval (if applicable). If you select Return Call to Queue, you need to also select whether to make the phoneset Busy or Not Ready.	Call Presentation: After call, break for ___ seconds	Answer call by placing DN on hold	Display Agent Reserved for Network Call
	◯ Call Force Timer Delay ____ seconds ◯ Return Call to Queue after ____ seconds then make phoneset Busy/Not Ready ◯ Let ring at phoneset	☐ ____	☐	☐
	◯ Call Force Timer Delay ____ seconds ◯ Return Call to Queue after ____ seconds then make phoneset Busy/Not Ready ◯ Let ring at phoneset	☐ ____	☐	☐
	◯ Call Force Timer Delay ____ seconds ◯ Return Call to Queue after ____ seconds then make phoneset Busy/Not Ready ◯ Let ring at phoneset	☐ ____	☐	☐
	◯ Call Force Timer Delay ____ seconds ◯ Return Call to Queue after ____ seconds then make phoneset Busy/Not Ready ◯ Let ring at phoneset	☐ ____	☐	☐
	◯ Call Force Timer Delay ____ seconds ◯ Return Call to Queue after ____ seconds then make phoneset Busy/Not Ready ◯ Let ring at phoneset	☐ ____	☐	☐
	◯ Call Force Timer Delay ____ seconds ◯ Return Call to Queue after ____ seconds then make phoneset Busy/Not Ready ◯ Let ring at phoneset	☐ ____	☐	☐
	◯ Call Force Timer Delay ____ seconds ◯ Return Call to Queue after ____ seconds then make phoneset Busy/Not Ready ◯ Let ring at phoneset	☐ ____	☐	☐
	◯ Call Force Timer Delay ____ seconds ◯ Return Call to Queue after ____ seconds then make phoneset Busy/Not Ready ◯ Let ring at phoneset	☐ ____	☐	☐
	◯ Call Force Timer Delay ____ seconds ◯ Return Call to Queue after ____ seconds then make phoneset Busy/Not Ready ◯ Let ring at phoneset	☐ ____	☐	☐

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Skillsets worksheet

SCCS06

System Name	

General				Call Presentation			
Skillset (e.g., Ticket_Sales)	**Default Activity Code** (e.g., 01_Booking)	**Threshold Class** (e.g., Skillset_Class)	**Map Skillset to ACD DN Number** As configured on the switch. If no, leave blank.	**Call Source Preference** (network skillset only)	**Call Age Preference**	**Call Request Queue Size** (network skillset only)	**Flow Control Threshold** (network skillset only)
			☐ ________	Local Network None	Oldest First in queue		
			☐ ________	Local Network None	Oldest First in queue		
			☐ ________	Local Network None	Oldest First in queue		
			☐ ________	Local Network None	Oldest First in queue		
			☐ ________	Local Network None	Oldest First in queue		
			☐ ________	Local Network None	Oldest First in queue		
			☐ ________	Local Network None	Oldest First in queue		
			☐ ________	Local Network None	Oldest First in queue		

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Skillsets Global Settings worksheet

SCCS07

System Name

Default Skillset (e.g., General_Inquiries)	
RAN Route (e.g., 7600)	
Agent Preference	Idle time since login Idle time since last status change Idle time since last call

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Supervisor Configuration worksheet

SCCS08a

System Name	

Supervisor Name	General Properties			Phoneset Properties		
User Name (firstname lastname)	**Title**	**Department**	**Lanaguage**	**Login ID**	**Position ID** Phoneset, configured on switch	**Personal DN**

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Agent Configuration worksheet

SCCS08b (1/3)

System Name	

Agent Name	General Properties				Phoneset Properties		Threshold Properties	
User Name	Title	Department	Lanaguage	Login ID	Personal DN	Call Presentation Class	Agent Threshold Class

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)							
	◯ Standby ◯ Priority _____		◯ Standby ◯ Priority _____		◯ Standby ◯ Priority _____		◯ Standby ◯ Priority _____
	◯ Standby ◯ Priority _____		◯ Standby ◯ Priority _____		◯ Standby ◯ Priority _____		◯ Standby ◯ Priority _____
	◯ Standby ◯ Priority _____		◯ Standby ◯ Priority _____		◯ Standby ◯ Priority _____		◯ Standby ◯ Priority _____
	◯ Standby ◯ Priority _____		◯ Standby ◯ Priority _____		◯ Standby ◯ Priority _____		◯ Standby ◯ Priority _____
	◯ Standby ◯ Priority _____		◯ Standby ◯ Priority _____		◯ Standby ◯ Priority _____		◯ Standby ◯ Priority _____
	◯ Standby ◯ Priority _____		◯ Standby ◯ Priority _____		◯ Standby ◯ Priority _____		◯ Standby ◯ Priority _____
	◯ Standby ◯ Priority _____		◯ Standby ◯ Priority _____		◯ Standby ◯ Priority _____		◯ Standby ◯ Priority _____
	◯ Standby ◯ Priority _____		◯ Standby ◯ Priority _____		◯ Standby ◯ Priority _____		◯ Standby ◯ Priority _____
	◯ Standby ◯ Priority _____		◯ Standby ◯ Priority _____		◯ Standby ◯ Priority _____		◯ Standby ◯ Priority _____

Supervisor Properties		SCCS08b(3/3)
Primary Supervisor	**Agent Key used by primary supervisor**	**Other supervisors associated with this agent**

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Agents to Skillsets Assignments worksheet

SCCS09

System Name	

Assignment Name	Agent Name	Supervisor	Skillset Name	Priority for this skillset	Schedule Assignment (indicate the frequency of the assignment)	
					○ Once ○ Daily ○ Weekly ○ Monthly ○ Yearly ○ Unscheduled	**Start Date** **Start Time** **End Time** **Interval**
					○ Once ○ Daily ○ Weekly ○ Monthly ○ Yearly ○ Unscheduled	**Start Date** **Start Time** **End Time** **Interval**

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Agents to Supervisor Assignments worksheet

SCCS10

System Name	

Assignment Name	Agent Name	Login ID	Assign to Supervisor	Original Supervisor	Schedule Assignment (indicate the frequency of the assignment)	
					○ Once ○ Daily ○ Weekly ○ Monthly ○ Yearly ○ Unscheduled	**Start Date**
						Start Time
						End Time
						Interval
					○ Once ○ Daily ○ Weekly ○ Monthly ○ Yearly ○ Unscheduled	**Start Date**
						Start Time
						End Time
						Interval

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Real-time Statistics Collection worksheet

SCCS11

System Name	

Collect Statistic?	Statistic to be collected	Modes Select one or both from the list below.
☑	Skillset statistics	☐ Moving Window ☐ Interval to date
☑	Nodal statistics	☐ Moving Window ☐ Interval to date
☐	Application statistics	☐ Moving Window ☐ Interval to date
☐	IVR statistics	☐ Moving Window ☐ Interval to date
☐	Route statistics	☐ Moving Window ☐ Interval to date
☐	Agent statistics	☐ Moving Window ☐ Interval to date
☐	Network statistics	☐ Moving Window ☐ Interval to date

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

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

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Historical Statistics Collection worksheet

SCCS12 (1/2)

System Name	

Options

Call Flows		Agent		IVR	
Applications	☐	Performance	☐	ACD-DN Statistics	☐
CDN	☐	By-Application	☐	Voice Port Statistics	☐
Skillset	☐	By-Skillset	☐	Voice Port Login / Logout	☐
Activity Codes	☐	Login / Logout	☐		
DNIS	☐				
Trunk	☐				
Route	☐				
Music/RAN route	☐				
Network In Call	☐				
Network Out Call	☐				

Parameters

Call Flows	Agent
Active Agents	Activity codes
Agent Positions	Agent events per day
Skillsets	Routes
Calls per hour	RAN Routes
DNIS	Music Routes
CDNs	Trunks
IVR ACD-DNs	Applications
	Nodes
	IVR Ports

Historical Statistics Collection worksheet

SCCS12 (2/2)

System Name	

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

Call by Call (Select applications for collecting call-by-call statistics)

Application	Statistics to be gathered
	☐ Local ☐ Network
	☐ Local ☐ Network
	☐ Local ☐ Network
	☐ Local ☐ Network
	☐ Local ☐ Network
	☐ Local ☐ Network
	☐ Local ☐ Network
	☐ Local ☐ Network
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	☐ Local ☐ Network
	☐ Local ☐ Network

NBConfig worksheet

NCC-01

Site Name	**ELAN IP Address** (e.g., 101.55.34.12)
	_____ . _____ . _____ . _____
	_____ . _____ . _____ . _____
	_____ . _____ . _____ . _____
	_____ . _____ . _____ . _____
	_____ . _____ . _____ . _____
	_____ . _____ . _____ . _____
	_____ . _____ . _____ . _____
	_____ . _____ . _____ . _____
	_____ . _____ . _____ . _____
	_____ . _____ . _____ . _____
	_____ . _____ . _____ . _____
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	_____ . _____ . _____ . _____
	_____ . _____ . _____ . _____
	_____ . _____ . _____ . _____
	_____ . _____ . _____ . _____
	_____ . _____ . _____ . _____

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Network Access Classes worksheet

NCC-02

Comments:

Indicate the access privileges for each of the items. Valid choices include: None (default), View, Edit, Create/Delete.					
Access Class Name (e.g., NCC_ Admin)					
	Access: None, View, Edit, Create/Delete				
Network Skillsets	N V E C	N V E C	N V E C	N V E C	N V E C
Sites	N V E C	N V E C	N V E C	N V E C	N V E C
Table Routing Assignments	N V E C	N V E C	N V E C	N V E C	N V E C
Network Historical Statistics	N V E	N V E	N V E	N V E	N V E
Network Communication Parameters	N V E	N V E	N V E	N V E	N V E

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Network Sites worksheet

NCC-03

Site Name	
Site Contact Person	
Site Contact Phone Number	
Filter Timer	
Time Zone Relative to GMT (e.g., EST = GMT - 5:00)	

Network Skillset	Routing Method	Routing Table (Selected Sites)
	◯ Round Robin ◯ Sequential	
	◯ Round Robin ◯ Sequential	
	◯ Round Robin ◯ Sequential	
	◯ Round Robin ◯ Sequential	
	◯ Round Robin ◯ Sequential	
	◯ Round Robin ◯ Sequential	

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Network Skillsets worksheet

NCC-03

Site Name		

Network Skillset	Routing Type	Comments
	◯ Round Robin ◯ Sequential	
	◯ Round Robin ◯ Sequential	
	◯ Round Robin ◯ Sequential	
	◯ Round Robin ◯ Sequential	
	◯ Round Robin ◯ Sequential	
	◯ Round Robin ◯ Sequential	
	◯ Round Robin ◯ Sequential	
	◯ Round Robin ◯ Sequential	
	◯ Round Robin ◯ Sequential	
	◯ Round Robin ◯ Sequential	
	◯ Round Robin ◯ Sequential	
	◯ Round Robin ◯ Sequential	
	◯ Round Robin ◯ Sequential	

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Table Routing Assignments worksheet

NCC-04

Name (e.g., Weekend_Assignments)	
Source Site Name (e.g., Vancouver)	
Comments:	

Network Skillset	Routing Table (Selected Sites)

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Network Communication Parameters worksheet

NCC-05

Site Name	Dialable DN (network CDN)	Number of Retries	Time Between Retries	Agent Reserve Timer

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Reader Response Form

Nortel Networks Symposium Call Center Server
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Setup Guide
P0910111

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Address: _____

_____

Occupation: _____ **Phone:** _____

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

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_____

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6. How could we improve this book?

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