



MERLIN[®]

COMMUNICATIONS SYSTEM

Installation Guide:
Call Management System

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NOTICE

The information in this manual is subject to change without notice. AT&T assumes no responsibility for any errors that may appear in this manual.

TRADEMARK NOTICE

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WARNING

This equipment generates, uses, and can radiate radio frequency energy. If it is not installed and used in accordance with the installation and administration manual, it may cause interference to radio communications.

The Call Management System hardware has been tested and found to comply with the limits for a Class A computing device as given in Subpart J of Part 15 of the FCC Rules. These requirements are designed to provide reasonable protection against radio frequency interference when operated in a commercial environment.

Operating this equipment in a residential area is likely to cause interference. If this occurs, the user, at his or her own expense, will be required to take the necessary measures to correct the interference.

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Call Management System Installation Guide

Overview

About Your Call Management System

The Call Management System (CMS) for your **MERLIN**[®] communications system is an automatic call distributor designed to work with the **MERLIN** communications system and the AT&T PC 6300 or 6300 PLUS microcomputer. The features of the CMS are especially useful for small businesses that deal with their customers primarily over the phone by helping the business handle incoming call traffic more efficiently.

The CMS can help your business in several ways:

- ❑ It allows you to organize your telephone lines into "line groups" and your agent positions into groups called "splits." Each agent may be assigned to a split, and the split is then assigned to a line group.
- ❑ It handles incoming calls as quickly as possible without losing the call or the customer. Agents have uniform workloads because the CMS connects the calls to the available agent who has been idle the longest. If all agents are busy, the system connects the caller to a recorded delay message and puts the call on hold.
- ❑ It provides status reports on call traffic and agent performance. If the call distribution and line groups need to be changed, the CMS supervisor can reassign line groups or agent splits without interrupting call handling.

About This Guide

The simple procedures described in this installation guide tell you how to:

- ❑ Insert the CMS expansion card into the AT&T PC
- ❑ Connect the PC to the **MERLIN** communications system control unit
- ❑ Connect the PC to the voice announcement unit

Getting Started

What You Need

Your CMS hardware package contains all the components you need to connect your PC to your **MERLIN** communications system:

- ❑ **AT&T MERLIN CMS expansion card**

This printed circuit board, which you install inside the personal computer, integrates the personal computer with your **MERLIN** communications system and the voice announcement unit. (See "A Note on the RAM Address and the IRQ Select," on the next page, for more information about the CMS expansion card.)

- ❑ **Two 14-foot station cables**

The station cables connect the CMS expansion card to the attendant ports on your **MERLIN** communications system control unit.

You also need the following equipment:

- ❑ **MERLIN** communications system
- ❑ AT&T PC 6300 or 6300 PLUS with hard disk
- ❑ Voice announcement unit
- ❑ AT&T 473 printer (optional)
- ❑ Small, flat-blade screwdriver

A Note on the RAM Address and the IRQ Select

Each expansion card in a personal computer requires exclusive use of certain areas (addresses) in the computer's memory. Two expansion cards cannot share the same address(es).

The CMS expansion card uses the following RAM (Random Access Memory) address and the IRQ (Interrupt Request) select. *These are set by the factory and cannot be changed.*

RAM C0000
IRQ 3

If there is another expansion card installed in the PC, or if in the future you add other expansion cards to your PC, follow these steps:

Note

There is a card already occupying one of the expansion slots in your PC. There is also a display control card attached to the inside wall of the PC next to slot 1. You do not have to worry about changing the addresses on these cards.

- 1 Find out the addresses used by the other expansion card(s). If no one in your organization knows, check with your supplier or the manufacturer.
- 2 If the other expansion card(s)
 - does not use the same RAM address or IRQ select as the CMS card, you don't need to make any changes on the other expansion card(s).
 - uses the RAM address C0000 and/or IRQ 3, you will have to change the RAM address and the IRQ select on that expansion card so that they are not the same as those on the CMS expansion card. Follow the instructions in the installation guide for that expansion card for setting the card's RAM address and the IRQ select.

Preparing the PC for the CMS Hardware

Before you install the CMS expansion card and connect the other equipment, you must:

- 1 Have your **MERLIN** system installed and set up. For directions on installing your **MERLIN** system, see the installation instructions that came with your system.
- 2 Place the PC on the desk or table where the CMS administrator will be working.

Then, follow these steps to get the PC ready for installing the CMS expansion card. A flat-blade screwdriver is the only tool you need.

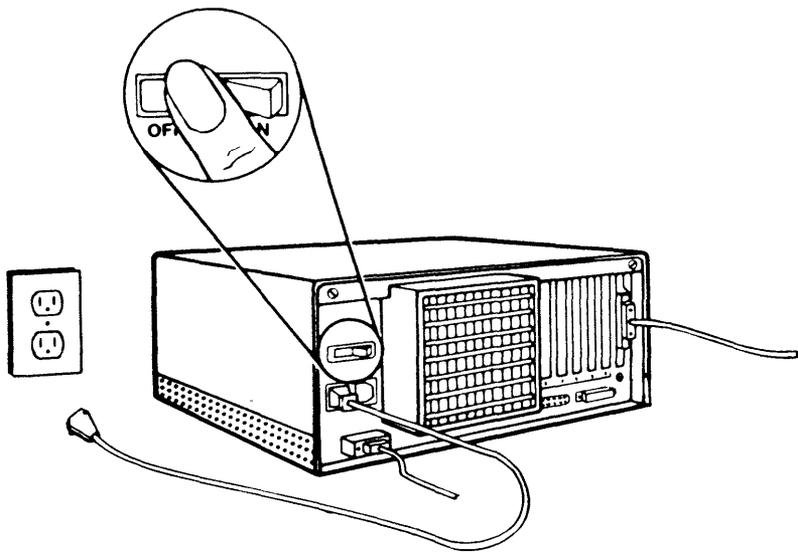
Disconnect the PC and Attachments

- 1 Turn off the power switch on the PC, as shown in Figure 1.
- 2 Turn off the power switches on the printer and any other attachments.
- 3 Unplug the computer's power cord from the electrical outlet, as shown in Figure 1. If you have any peripheral equipment attached to the PC, such as a printer, unplug their power cords as well.

Warning

Failure to disconnect the power may damage the computer.

FIGURE 1 Disconnecting the power on the PC

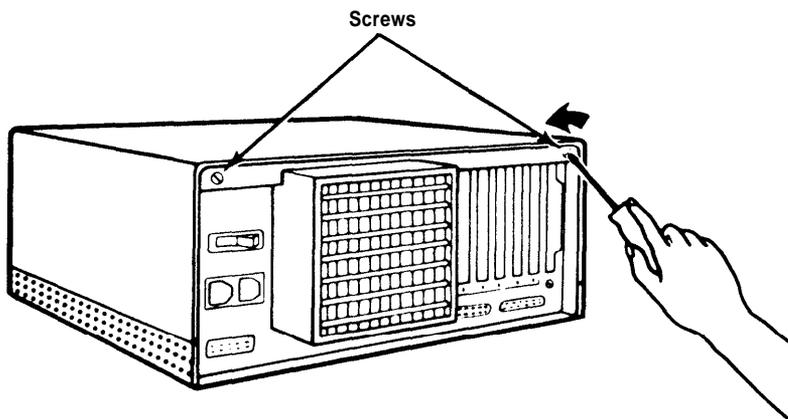


- 4 Turn the computer so the rear of the unit is facing you.
- 5 Move the monitor, keyboard, and any other attachments away from your work area.

Remove the Cover from the PC

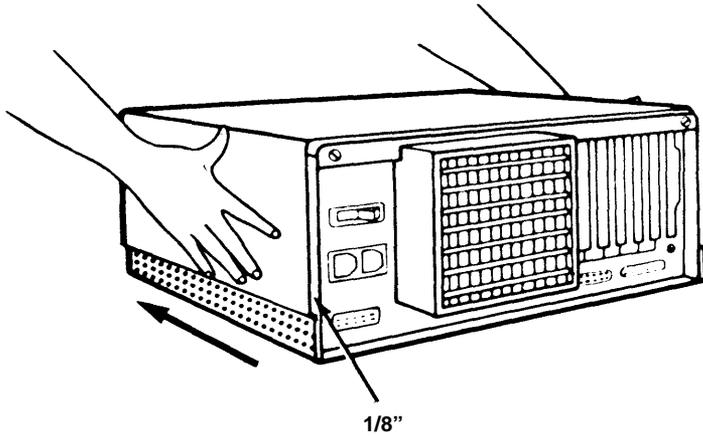
- 1 Locate the two screws on the upper back of the unit, and using a flat-blade screwdriver, unscrew them about 1/4 of an inch, or until they move freely, as shown in Figure 2 below.

FIGURE 2 Loosening the screws on the PC



- 2 Then, turn the unit so the front is facing you.
- 3 Stand in front of the unit and place your hands on the sides of the cover, as shown in Figure 3.

FIGURE 3 Sliding the cover of the PC forward



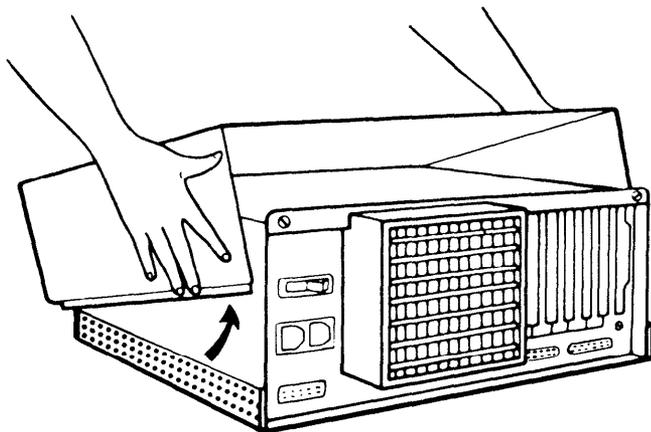
- 4 Brace the unit against your hip or thigh, and firmly slide the cover toward the front of the unit. (It will move only about 1/8 of an inch.)

Note

The cover fits snugly, and it may be difficult to move out of its normal position. If the cover does not move, you may have to loosen the screws a bit more or pry the cover forward with the screwdriver.

- 5 Place your hands on the sides of the cover toward the rear and tilt it so that the rear section is higher than the front, as shown in Figure 4.

FIGURE 4 Removing the cover of the PC



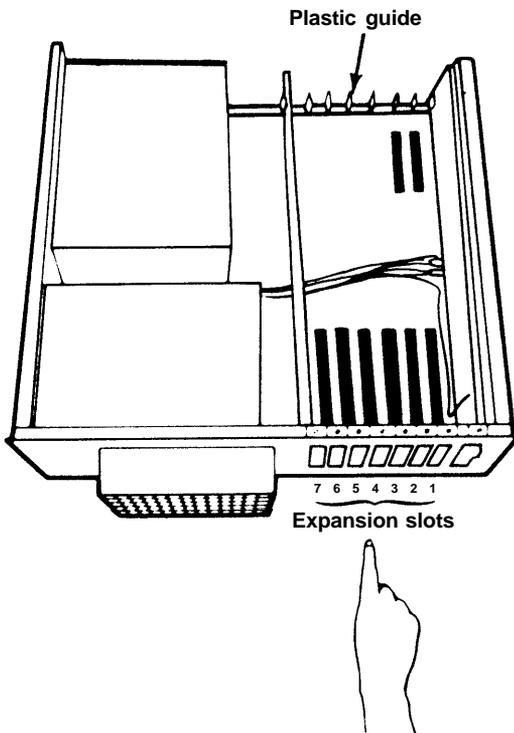
- 6 Lift the cover from the base unit and set it aside.

Inserting the CMS Expansion Card into the PC

Once you have taken the cover off your PC, you are ready to insert the CMS expansion card.

In your PC there are seven expansion slots numbered 1 through 7, as shown in Figure 5. There are plastic guides opposite the expansion slots, in the front of the PC. The expansion card must fit into an expansion slot receptacle and into a plastic guide.

FIGURE 5 The expansion slots in the PC



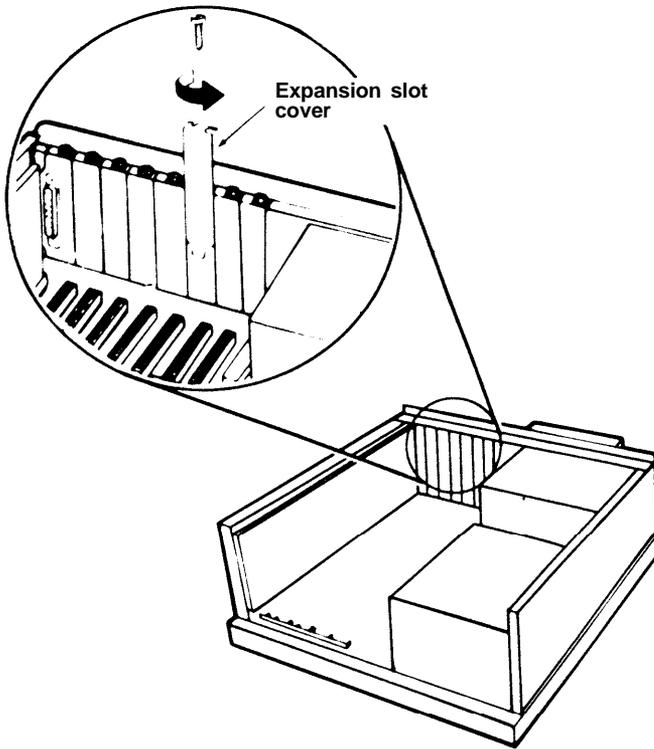
Before you begin to insert the expansion card in the PC, you should note these important points:

- ❑ As you insert the card, be sure that you do not bend it.
- ❑ Avoid touching the gold "fingers" at the base of the card. Always hold the card by its top corner edges.

To insert the CMS expansion card in one of the expansion slots, follow these directions,

- 1 Choose an empty slot for the expansion card.
 - ❑ If there are other expansion cards inside the unit, be sure they do not interfere with the space you need for the CMS card. After you install the CMS expansion card, be sure that it does not touch any other card in the unit.
- 2 Using the flat-blade screwdriver, remove the screw from the metal cover of the expansion slot that you have chosen. Set the screw aside since you will need it again later.
- 3 Remove the expansion slot cover by sliding it up.

FIGURE 6 Removing the expansion slot cover



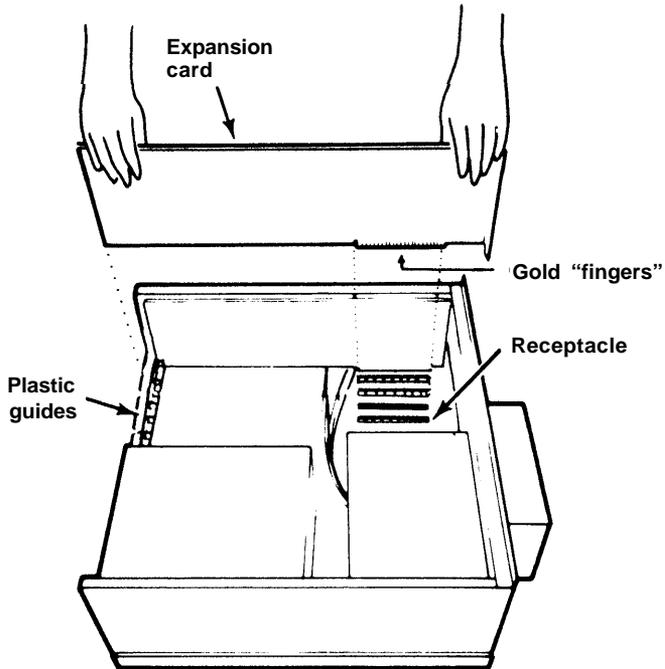
Note

The hard disk card that is in slot 7 of the PC is not shown in Figure 6.

- 4 Make sure the expansion slot is clear. Position the colored wires crossing the slot so they are *below* the card as you install it.
- 5 Holding the expansion card by its top corner edges, lower the expansion card into the expansion slot receptacle you have chosen, as shown in Figure 7. (Do not try to insert the card through the back of the unit.)

- 6 Position the expansion card so the electrical contacts, the gold "fingers," are aligned with the receptacle in the expansion slot and the back edge of the card fits into the groove on the plastic guide, as shown in Figure 7.

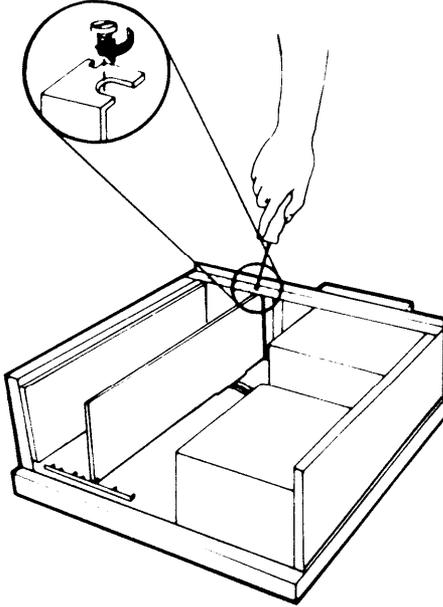
FIGURE 7 Lowering the expansion card into the receptable



- 7 Press down on the top edge of the card until you feel and hear the card "lock" into place. The card is "locked" when the frame of the card is flush with the frame of the unit.
 - ❑ If the card tilts or wobbles when you press on either end, the card is not properly installed. Take out the card and reinsert it. Be careful that you do not bend the card.
 - ❑ Make sure that the expansion card is not touching any other card. If it is, move the card to another slot.
 - ❑ Be sure the bracket that replaces the slot cover slides into its position.

- 8 Screw down the CMS expansion card with the screw you removed from the metal expansion slot cover, as shown in Figure 8.

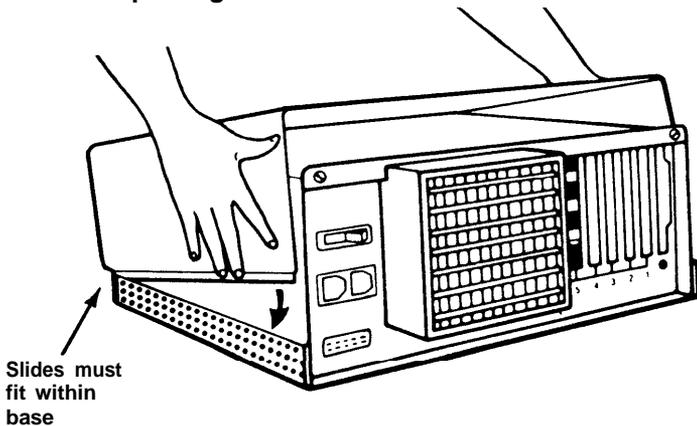
FIGURE 8 Screwing down the expansion card



Reassembling the PC

- 1 Face the front of the unit and lower the front of the cover so that the rear is slightly higher than the front.
- 2 Align the front of the cover with the front of the base, as shown in Figure 9. Make sure that the sides of the cover fit within the base of the unit at the front, and that the plastic tabs at the front of the cover are under the disk drive.

FIGURE 9 Replacing the cover of the PC



- 3 Lower the back of the cover onto the base.
- 4 Slide the cover about 1/8 of an inch toward the front of the unit.
- 5 Then, slide the cover toward the rear of the unit. The sides of the cover should now fit within the base, and the top of the cover should extend slightly beyond the rear of the unit.
- 6 Tighten the screws at the back of the unit.
- 7 Plug the computer into an ac outlet.
- 8 Reconnect the peripherals you disconnected in "Preparing the PC for the CMS Hardware."

Connecting the PC to Your MERLIN Communications System

Use the following directions to connect the PC to your **MERLIN** communications system.

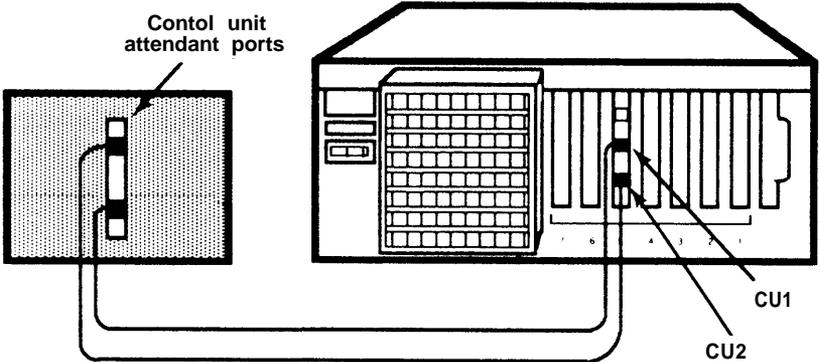
Note

For more efficient call handling, it is recommended that you connect both the CU 1 and CU 2 jacks to attendant ports on the **MERLIN** control unit. However, if you have only one attendant port available, connect that port to CU 1.

- 1 Turn your PC so you can see the three jacks in the expansion card.
- 2 Plug one of the 14-foot station cables provided in the CMS hardware package to the expansion card's middle jack, labeled CU 1.
- 3 Plug the loose end of this cable to an attendant port.
 - ❑ Do *not* use jack 10.
 - ❑ If you plan to use a second attendant station, both station jacks must be connected to attendant ports on the same line card. So, be sure to attach the CU 1 jack to an attendant port that has a second port available below it. Then go on to steps 4 and 5.
- 4 Plug the loose end of the second 14-foot station cable provided in the CMS hardware package to the CMS expansion card's lower jack, labeled CU 2.
- 5 Plug the other end of this cable into an attendant port on the same card as the attendant port you connected in step 3.

Figure 10 shows an example of a connection between the expansion card CU 1 and CU 2 jacks and two attendant ports on a **MERLIN** communications system control unit. Before you connect the CU jacks to your **MERLIN** system control unit, check the documentation that came with it to determine which jacks are attendant ports.

FIGURE 10 Connecting the expansion card to a **MERLIN** control unit



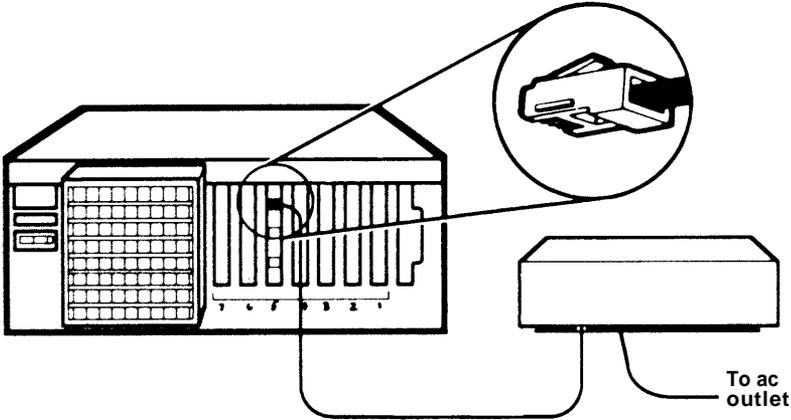
Connecting the PC to the Voice Announcement Unit

Follow these procedures for connecting the PC to the voice announcement unit. To connect the two units, you need a 14-foot tape unit cord, provided in either the CMS hardware package or the Voice Announcement package.

- 1 Set up your voice announcement unit by following the instructions that came with the unit.
- 2 Turn your PC so you can see the three jacks in the CMS expansion card.
- 3 Using the cord provided, connect the voice announcement unit to the top jack (labeled AUX) on the expansion card.

Figure 11 shows how the voice announcement unit is connected to the CMS expansion card.

FIGURE 11 Connecting the expansion card and the voice announcement unit



What's Next?

You are now finished installing the CMS hardware and connecting the necessary equipment.

- ❑ Before you can use your voice announcement unit, you must record an announcement. Follow the instructions that came with your unit to record a clear, informative message.
- ❑ If you choose to connect the optional AT&T 473 printer, follow the installation directions that come with that unit.
- ❑ Before you can use your Call Management System, you must install the CMS software, which comes in the CMS software package. Instructions on installing and administering the CMS software are in the section titled *Administration Manual* in the three ring binder that came with your CMS software package.
- ❑ Place this guide in the back of that binder and keep it handy in case you need to refer to the installation instructions again.

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