



*How the world shares ideas.*

## **Symposium Call Center Server 3.0**

For the Meridian 1

**End-to-End Task Flow Guide**



# Introduction to Symposium Call Center Server

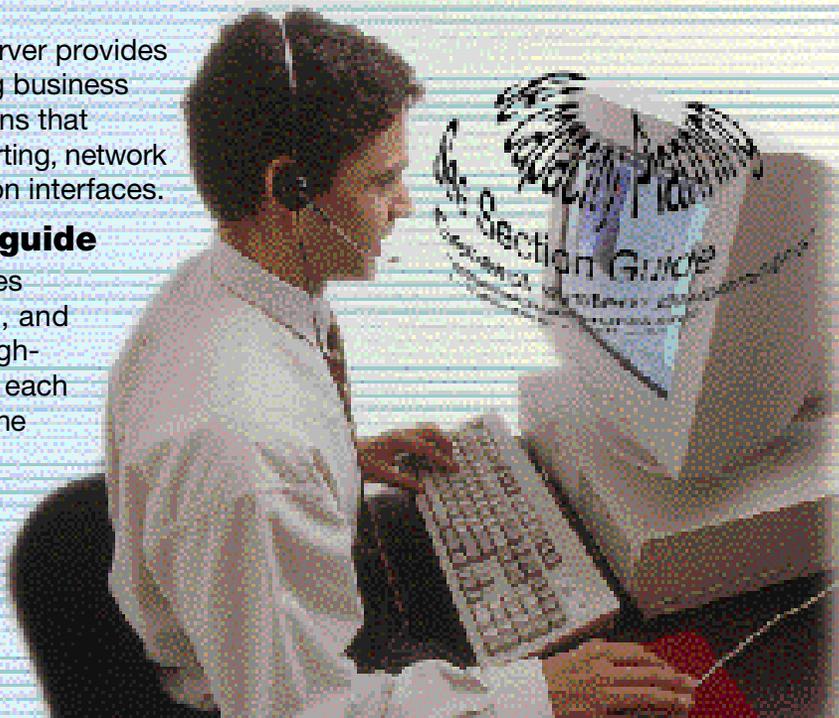
## **The call center solution**

Nortel Networks' Symposium Call Center Server provides a call center solution for varied and changing business requirements by offering a suite of applications that includes call processing, agent handling, reporting, network skill-based routing, and third-party application interfaces.

## **About this end-to-end task flow guide**

This guide provides an overview of the phases involved in the planning, installation, setup, and configuration of a call center. It provides a high-level overview of the tasks performed during each phase, and it describes where you can find the instructions for performing these tasks.

By following the recommended sequence of tasks and consulting the appropriate documents, you can successfully set up your call center.



# Reference books: Order numbers

Reference books	Order number
• Planning and Engineering Guide Package	NTPH03AA/A0807347
• 702t Installation and Maintenance Guide	P0884909
• 1001t Installation Guide	P0879480
• 1001t Maintenance and Diagnostics Guide	P0879481
• 1003t Installation and Maintenance Guide	P0911675
• Software Installation and Upgrade Guide Package	NTPH05AA/A0807353
• Symposium, M1, and Voice Processing Guide	P0910113
• Setup Guide Package	NTPH02AA/A0807344
• Scripting Guide	P0910109

Reference books	Order number
• Scripting Quick Reference Card	P0911677
• Administrator's Guide	P0910110
• Supervisor's Guide	P0910107
• Historical Reporting and Data Dictionary	P0910108
• Network Control Center Administrator's Guide	P0910106

## List of abbreviations

ACD	Automatic Call Distribution
AST	Associated Set
CDN	Controlled Directory Number
CTI	Computer Telephony Integration
DN	Directory Number
ELAN	Embedded Local Area Network
IVR	Interactive Voice Response
NACD	Network Automatic Call Distribution
NSBR	Network Skill-Based Routing
ODBC	Open Database Connectivity
SQL	Structured Query Language
VSDN	Voice Service Directory Number

# Initial setup and configuration tasks



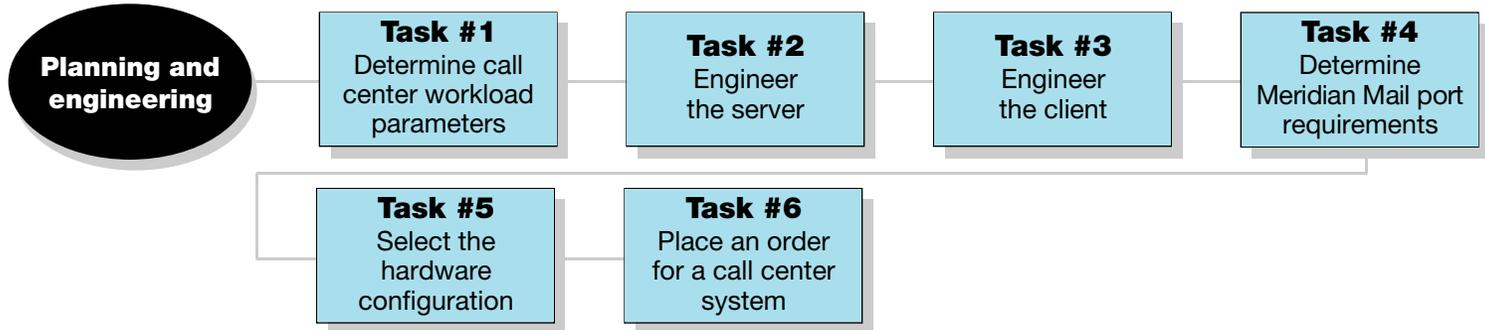
# Initial setup and configuration tasks

Phase #	Tasks	Where to find information
1.	Planning and engineering	<ul style="list-style-type: none"> <li>• Planning and Engineering Guide Package</li> </ul>
2.	Installation	<ul style="list-style-type: none"> <li>• Hardware Installation Guides</li> <li>• Software Installation and Upgrade Guide Package</li> </ul>
3A/B/C.	Configuration of switch resources, Meridian Link Services, and Meridian Mail resources	<ul style="list-style-type: none"> <li>• Symposium, M1, and Voice Processing Guide</li> </ul>
4.	Setup of SMI workbench	<ul style="list-style-type: none"> <li>• Software Installation and Upgrade Guide Package</li> <li>• Administrator's Guide</li> </ul>
5.	Configuration of security	<ul style="list-style-type: none"> <li>• Setup Guide Package</li> <li>• Administrator's Guide</li> </ul>
6.	Configuration of threshold classes	<ul style="list-style-type: none"> <li>• Setup Guide Package</li> <li>• Administrator's Guide</li> </ul>
7.	Configuration of switch resources (in Symposium Call Center Server)	<ul style="list-style-type: none"> <li>• Setup Guide Package</li> <li>• Administrator's Guide</li> </ul>
8.	Configuration of call presentation classes	<ul style="list-style-type: none"> <li>• Setup Guide Package</li> <li>• Administrator's Guide</li> </ul>
9.	Configuration of skillsets	<ul style="list-style-type: none"> <li>• Setup Guide Package</li> <li>• Administrator's Guide</li> </ul>

## Initial setup and configuration tasks (cont.)

Phase #	Tasks	Where to find information
10.	Configuration of call center users	<ul style="list-style-type: none"> <li>• Setup Guide Package</li> <li>• Administrator's Guide</li> </ul>
11.	Configuration of assignments	<ul style="list-style-type: none"> <li>• Setup Guide Package</li> <li>• Administrator's Guide</li> </ul>
12.	Configuration of statistics collection	<ul style="list-style-type: none"> <li>• Setup Guide Package</li> <li>• Administrator's Guide</li> </ul>
13.	Configuration of voice files and segments (if you are using Meridian Mail to provide voice processing)	<ul style="list-style-type: none"> <li>• Administrator's Guide</li> </ul>
14.	Creation of scripts	<ul style="list-style-type: none"> <li>• Scripting Guide</li> </ul>
15.	Creation of customized formulas (optional)	<ul style="list-style-type: none"> <li>• Administrator's Guide</li> </ul>
16.	Creation of customized real-time displays (optional)	<ul style="list-style-type: none"> <li>• Supervisor's Guide</li> </ul>
17.	Creation of customized reports (optional)	<ul style="list-style-type: none"> <li>• Historical Reporting and Data Dictionary</li> <li>• Supervisor's Guide</li> </ul>
18.	Scheduling of automatic backups	<ul style="list-style-type: none"> <li>• Administrator's Guide</li> </ul>
19.	Configuration of the NACD network (if you are routing calls between sites with NACD or NSBR) (optional)	<ul style="list-style-type: none"> <li>• Symposium, M1, and Voice Processing Guide</li> </ul>
20.	Configuration of NSBR (if you are using the optional NSBR feature to route calls between sites) (optional)	<ul style="list-style-type: none"> <li>• Network Control Center Administrator's Guide</li> </ul>

# Phase 1: Planning and engineering



Task #	Task description	Tasks involved	Where to find information
1.	Determine call center workload parameters	Determine values for workload parameters	• Planning and Engineering Guide Package
2.	Engineer the server	Determine requirements in one of the following ways: <ul style="list-style-type: none"> <li>• using Cap Tool</li> <li>• using formulas</li> </ul>	• Planning and Engineering Guide Package
3.	Engineer the client	Determine client hardware configuration	• Planning and Engineering Guide Package
4.	Determine Meridian Mail port requirements	Determine requirements using tables and detailed computations	• Planning and Engineering Guide Package
5.	Select the hardware configuration	Determine hardware configuration	• Planning and Engineering Guide Package
6.	Place an order for call center system		

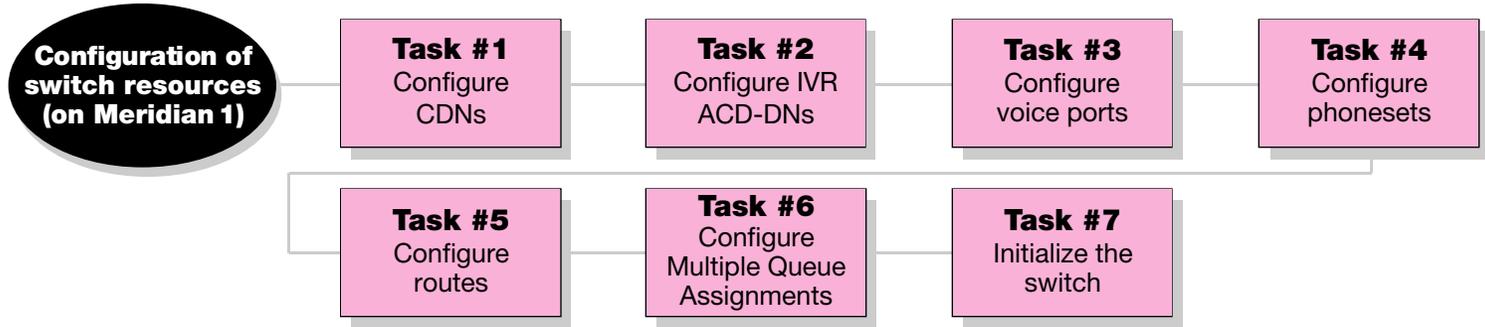


## Phase 2: Installation (cont.)

Task #	Task description	Tasks involved	Where to find information
4.	Connect peripherals and cables	a. Install the mouse, keyboard, monitor, and modem b. Attach cables c. Power up the server	<ul style="list-style-type: none"> <li>• Hardware Installation Guides</li> </ul>
5.	Configure Windows NT on the server	Configure network services and set local parameters	<ul style="list-style-type: none"> <li>• Software Installation and Upgrade Guide Package</li> </ul>
6.	Install the server application software	Install platform and call center applications software	<ul style="list-style-type: none"> <li>• Software Installation and Upgrade Guide Package</li> </ul>
7.	Put the server into configuration mode	Place the server in configuration mode to allow client installation and server configuration from the client PC	<ul style="list-style-type: none"> <li>• Software Installation and Upgrade Guide Package</li> </ul>
8.	Install the client PC application software	Install client applications on client PC	<ul style="list-style-type: none"> <li>• Software Installation and Upgrade Guide Package</li> </ul>
9.	Complete the server software installation	a. Return to the server software installation b. Complete the server installation	<ul style="list-style-type: none"> <li>• Software Installation and Upgrade Guide Package</li> </ul>

**Note:** If you are using the optional NSBR feature, you must also install the NCC when you configure NSBR. See Phase 20.

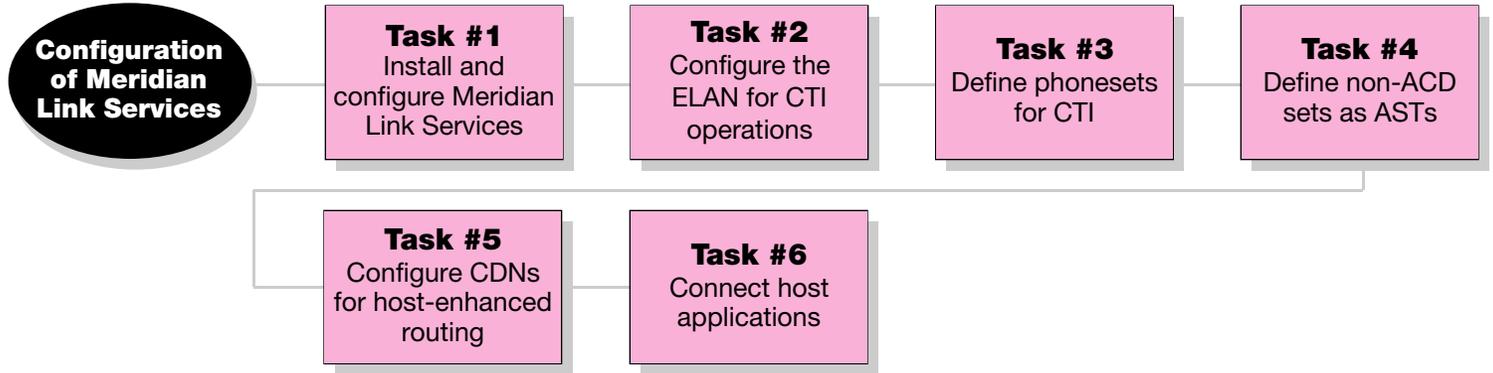
# Phase 3A: Configuration of switch resources (on Meridian 1)



Task #	Task description	Where to find information
1.	Configure CDNs	• Symposium, M1, and Voice Processing Guide
2.	Configure IVR ACD-DNs (if you are using IVR)	• Symposium, M1, and Voice Processing Guide
3.	Configure voice ports (if you are using IVR)	• Symposium, M1, and Voice Processing Guide
4.	Configure phonesets	• Symposium, M1, and Voice Processing Guide
5.	Configure routes (if you are using NSBR or NACD to route calls between sites)	• Symposium, M1, and Voice Processing Guide
6.	Configure Multiple Queue Assignments	• Symposium, M1, and Voice Processing Guide
7.	Initialize the switch	• Symposium, M1, and Voice Processing Guide

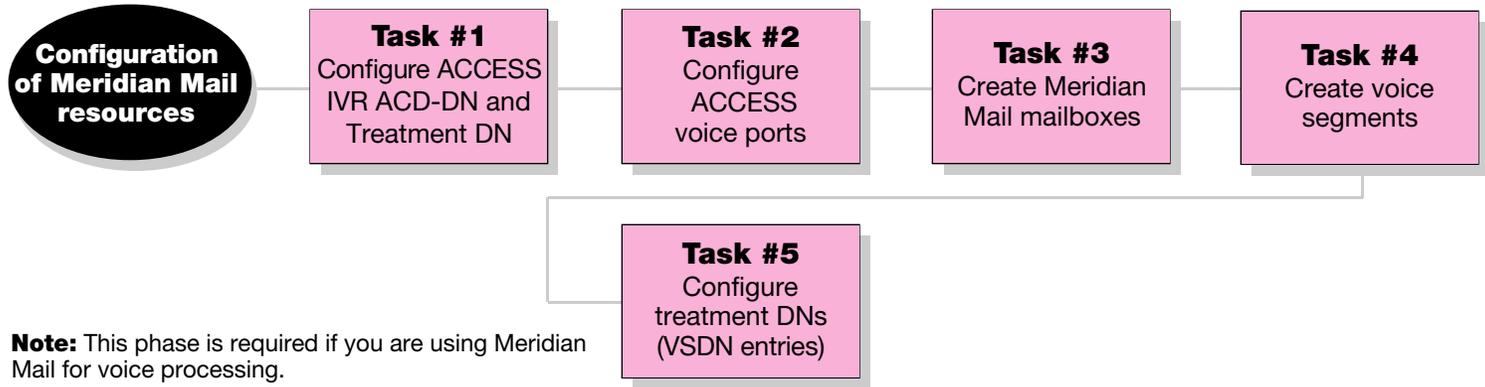
**Note:** If you are using the optional NSBR feature, you must perform additional configuration tasks when you configure NSBR. See Phases 19 and 20.

# Phase 3B: Configuration of Meridian Link Services



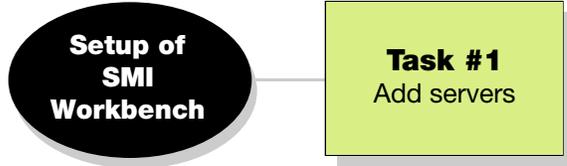
Task #	Task description	Where to find information
1.	Install and configure Meridian Link Services	• Symposium, M1, and Voice Processing Guide
2.	Configure the ELAN for CTI operations	• Symposium, M1, and Voice Processing Guide
3.	Define phonesets for CTI	• Symposium, M1, and Voice Processing Guide
4.	Define non-ACD phonesets as ASTs	• Symposium, M1, and Voice Processing Guide
5.	Configure CDNs for host-enhanced routing	• Symposium, M1, and Voice Processing Guide
6.	Connect host applications	• Symposium, M1, and Voice Processing Guide

# Phase 3C: Configuration of Meridian Mail resources (optional)



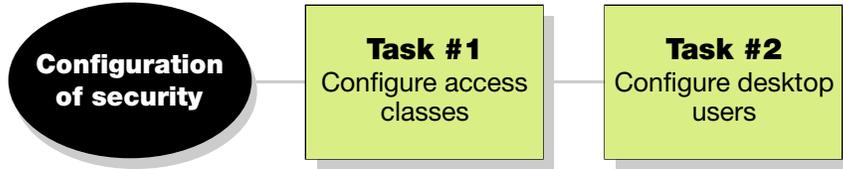
Task #	Task description	Where to find information
1.	Configure ACCESS IVR ACD-DN and ACCESS Treatment DN	• Symposium, M1, and Voice Processing Guide
2.	Configure ACCESS voice ports	• Symposium, M1, and Voice Processing Guide
3.	Create Meridian Mail mailboxes	• Symposium, M1, and Voice Processing Guide
4.	Create voice segments	• Symposium, M1, and Voice Processing Guide
5.	Configure treatment DN's (VSDN entries)	• Symposium, M1, and Voice Processing Guide

# Phase 4: Setup of SMI Workbench



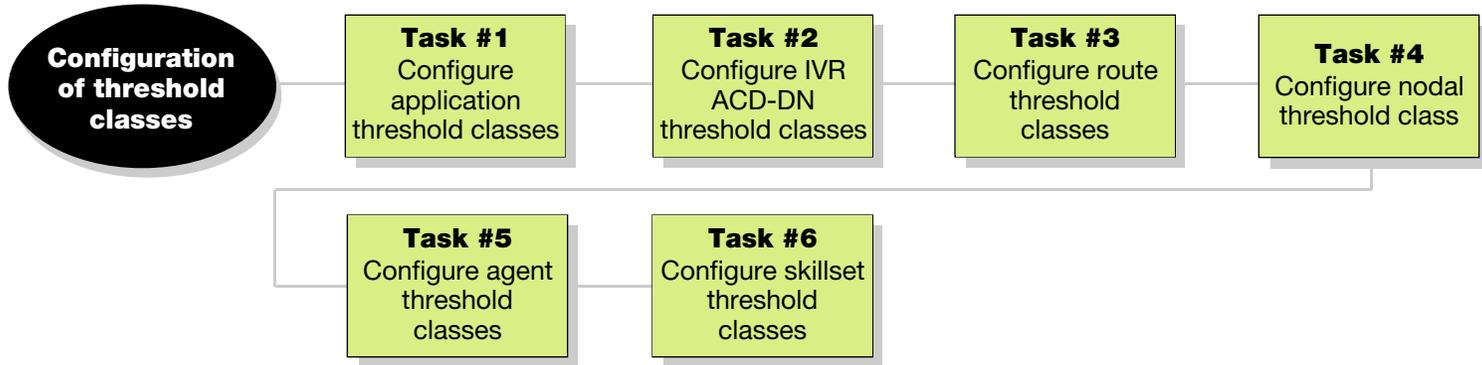
Task #	Task description	Where to find information
1.	Add servers	<ul style="list-style-type: none"><li>• Software Installation and Upgrade Guide Package</li><li>• Administrator's Guide</li></ul>

# Phase 5: Configuration of security



Task #	Task description	Where to find information
1.	Configure access classes	<ul style="list-style-type: none"><li>• Setup Guide Package</li><li>• Administrator's Guide</li></ul>
2.	Configure desktop users (users who can access Symposium Call Center Server functions from a client PC)	<ul style="list-style-type: none"><li>• Setup Guide Package</li><li>• Administrator's Guide</li></ul>

# Phase 6: Configuration of threshold classes



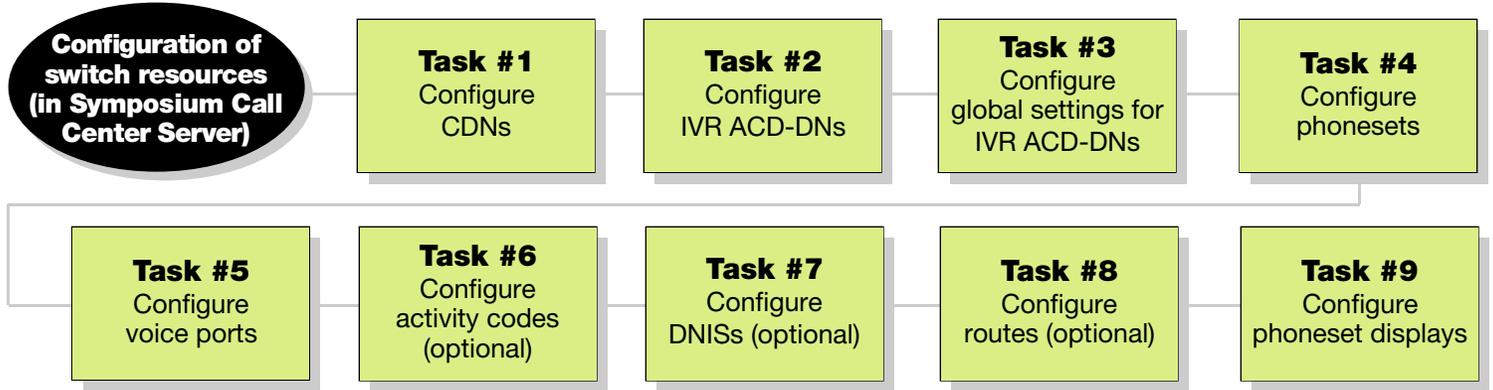
Task #	Task description	Where to find information
1.	Configure application threshold classes	<ul style="list-style-type: none"><li>• Setup Guide Package</li><li>• Administrator's Guide</li></ul>
2.	Configure IVR ACD-DN threshold classes	<ul style="list-style-type: none"><li>• Setup Guide Package</li><li>• Administrator's Guide</li></ul>
3.	Configure route threshold classes	<ul style="list-style-type: none"><li>• Setup Guide Package</li><li>• Administrator's Guide</li></ul>

## Phase 6: Configuration of threshold classes (cont.)

Task #	Task description	Where to find information
4.	Configure nodal threshold class	<ul style="list-style-type: none"><li>• Setup Guide Package</li><li>• Administrator's Guide</li></ul>
5.	Configure agent threshold classes	<ul style="list-style-type: none"><li>• Setup Guide Package</li><li>• Administrator's Guide</li></ul>
6.	Configure skillset threshold classes	<ul style="list-style-type: none"><li>• Setup Guide Package</li><li>• Administrator's Guide</li></ul>

# Phase 7: Configuration of switch resources

## (in Symposium Call Center Server)



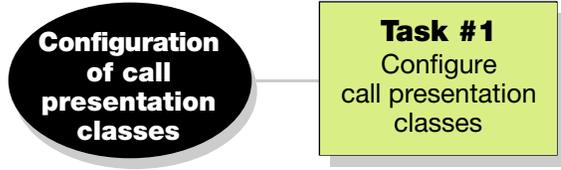
Task #	Task description	Tasks involved	Where to find information
1.	Configure CDNs	a. Configure a CDN b. Check configuration on the switch c. Acquire the CDN d. Test the CDN	<ul style="list-style-type: none"> <li>Setup Guide Package</li> <li>Administrator's Guide</li> </ul>
2.	Configure IVR ACD-DNs	a. Configure an IVR ACD-DN b. Check configuration on the switch c. Acquire the IVR ACD-DN	<ul style="list-style-type: none"> <li>Setup Guide Package</li> <li>Administrator's Guide</li> </ul>

## Phase 7: Configuration of switch resources (in Symposium Call Center Server) (cont.)

Task #	Task description	Tasks involved	Where to find information
3.	Configure global settings for IVR ACD-DNs	Configure global settings for IVR ACD-DNs	<ul style="list-style-type: none"> <li>• Setup Guide Package</li> <li>• Administrator's Guide</li> </ul>
4.	Configure phonesets	a. Configure a phoneset b. Check configuration on the switch c. Acquire the phoneset d. Test the phoneset	<ul style="list-style-type: none"> <li>• Setup Guide Package</li> <li>• Administrator's Guide</li> </ul>
5.	Configure voice ports	a. Configure a voice port b. Check configuration on the switch c. Acquire the voice port d. Test the voice port	<ul style="list-style-type: none"> <li>• Setup Guide Package</li> <li>• Administrator's Guide</li> </ul>
6.	Configure activity codes (optional)	Configure activity codes	<ul style="list-style-type: none"> <li>• Setup Guide Package</li> <li>• Administrator's Guide</li> </ul>
7.	Configure DNISs (optional)	Configure DNISs	<ul style="list-style-type: none"> <li>• Setup Guide Package</li> <li>• Administrator's Guide</li> </ul>
8.	Configure routes (optional)	a. Configure a route b. Check configuration on the switch c. Acquire the route	<ul style="list-style-type: none"> <li>• Setup Guide Package</li> <li>• Administrator's Guide</li> </ul>
9.	Configure phoneset displays	Add fields to, remove fields from, and rearrange fields on phoneset displays	<ul style="list-style-type: none"> <li>• Setup Guide Package</li> <li>• Administrator's Guide</li> </ul>

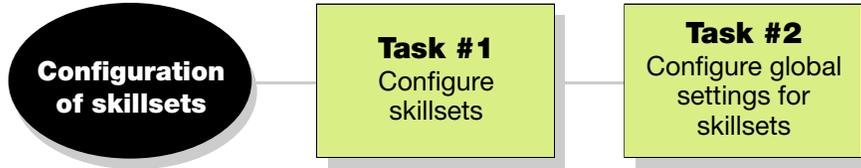
**Note:** If you are using the optional NSBR feature, you must perform additional configuration tasks when you configure NSBR. See Phase 20.

# Phase 8: Configuration of call presentation classes



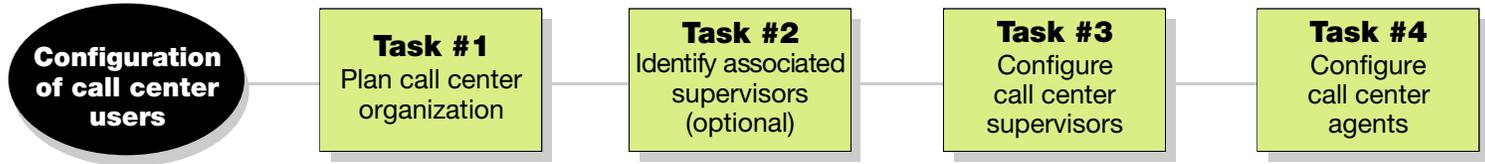
Task #	Task description	Where to find information
1.	Configure call presentation classes	<ul style="list-style-type: none"><li>• Setup Guide Package</li><li>• Administrator's Guide</li></ul>

# Phase 9: Configuration of skillsets



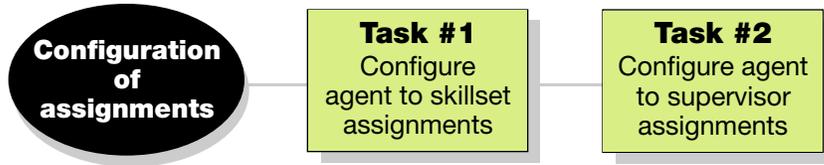
Task #	Task description	Where to find information
1.	Configure skillsets	<ul style="list-style-type: none"><li>• Setup Guide Package</li><li>• Administrator's Guide</li></ul>
2.	Configure global settings for skillsets	<ul style="list-style-type: none"><li>• Setup Guide Package</li><li>• Administrator's Guide</li></ul>

# Phase 10: Configuration of call center users



Task #	Task description	Tasks involved	Where to find information
1.	Plan call center organization	Identify supervisors and reporting agents	<ul style="list-style-type: none"> <li>• Setup Guide Package</li> <li>• Administrator's Guide</li> </ul>
2.	Identify associated supervisors (optional)	Assign backup supervisors to agents	<ul style="list-style-type: none"> <li>• Setup Guide Package</li> <li>• Administrator's Guide</li> </ul>
3.	Configure call center supervisors	Define supervisors on the server	<ul style="list-style-type: none"> <li>• Setup Guide Package</li> <li>• Administrator's Guide</li> </ul>
4.	Configure call center agents	Define agents on the server	<ul style="list-style-type: none"> <li>• Setup Guide Package</li> <li>• Administrator's Guide</li> </ul>

# Phase 11: Configuration of assignments



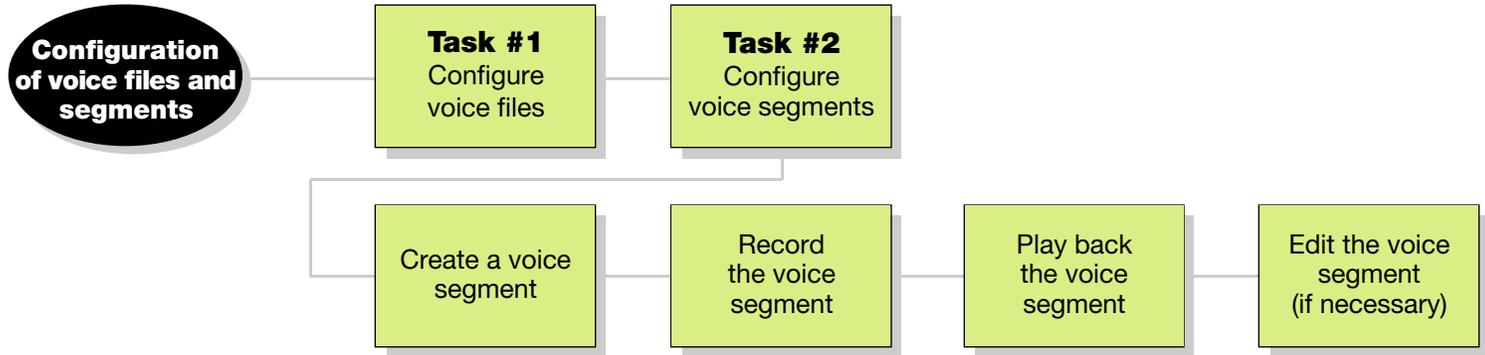
Task #	Task description	Where to find information
1.	Configure agent to skillset assignments	<ul style="list-style-type: none"><li>• Setup Guide Package</li><li>• Administrator's Guide</li></ul>
2.	Configure agent to supervisor assignments	<ul style="list-style-type: none"><li>• Setup Guide Package</li><li>• Administrator's Guide</li></ul>

# Phase 12: Configuration of statistics collection



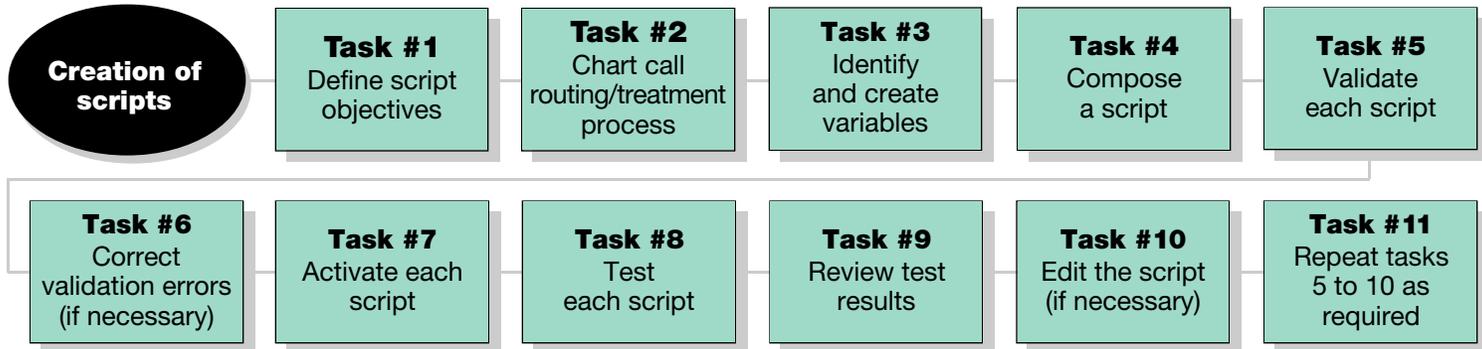
Task #	Task description	Tasks involved	Where to find information
1.	Configure historical statistics collection	Choose <ul style="list-style-type: none"><li>the types of statistics to be collected</li><li>how long statistics are stored</li><li>the applications for which call-by-call statistics are collected</li></ul>	<ul style="list-style-type: none"><li>Setup Guide Package</li><li>Administrator's Guide</li></ul>
2.	Configure real-time statistics collection	Choose the types of statistics to be collected and the refresh rates	<ul style="list-style-type: none"><li>Setup Guide Package</li><li>Administrator's Guide</li></ul>

# Phase 13: Configuration of voice files and segments



Task #	Task description	Tasks involved	Where to find information
1.	Configure voice files	Configure the voice files	<ul style="list-style-type: none"> <li>Administrator's Guide</li> </ul>
2.	Configure voice segments	a. Create a voice segment b. Record the voice segment c. Play back (test) the voice segments, individually, or in groups d. Edit the voice segment (if necessary)	<ul style="list-style-type: none"> <li>Administrator's Guide</li> </ul>

# Phase 14: Creation of scripts



Task #	Task description	Tasks involved	Where to find information
1.	Define script objectives	Define script objectives	<ul style="list-style-type: none"> <li>Scripting Guide</li> </ul>
2.	Chart call routing/treatment process	Chart the call routing/treatment process	<ul style="list-style-type: none"> <li>Scripting Guide</li> </ul>
3.	Identify and create variables	Identify and create needed variables	<ul style="list-style-type: none"> <li>Scripting Guide</li> </ul>
4.	Compose a script	Compose script in one of the following ways: <ul style="list-style-type: none"> <li>Use sample scripts provided with Symposium Call Center Server</li> <li>Enter the text manually</li> <li>Copy parts of other scripts</li> </ul>	<ul style="list-style-type: none"> <li>Scripting Guide</li> </ul>

## Phase 14: Creation of scripts (cont.)

Task #	Task description	Tasks involved	Where to find information
5.	Validate each script	Validate each script	• Scripting Guide
6.	Correct validation errors (if necessary)	Correct validation errors	• Scripting Guide
7.	Activate each script	Activate each script	• Scripting Guide
8.	Test each script	Test each script by placing calls and ensuring that they are handled correctly	• Scripting Guide
9.	Review test results	Review test results and validate	• Scripting Guide
10.	Edit the script (if necessary)		
11.	Repeat tasks 5 to 10 as required		

**Note:** If you are using the optional NSBR feature, you must create the Network\_Script when you configure NSBR. See Phase 20.

# Phase 15: Creation of customized formulas (optional)

**Creation  
of customized  
formulas**

**Task #1**  
Create custom  
formulas

Task #	Task description	Tasks involved	Where to find information
1.	Create custom formulas	Create custom formulas for use in real-time displays	<ul style="list-style-type: none"><li>Administrator's Guide</li></ul>

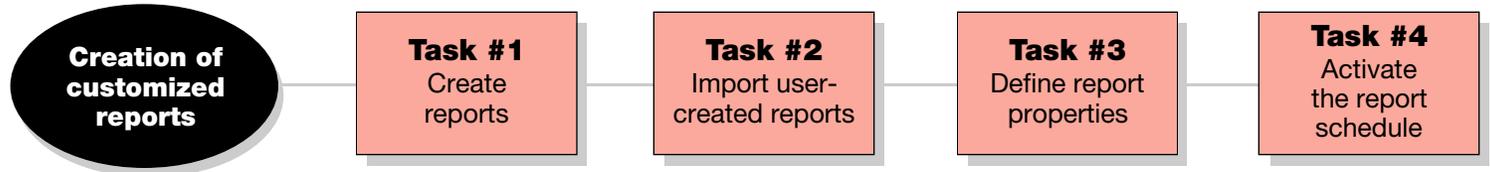
# Phase 16: Creation of customized real-time displays (optional)

**Creation  
of customized  
real-time  
displays**

**Task #1**  
Create  
new real-time  
displays

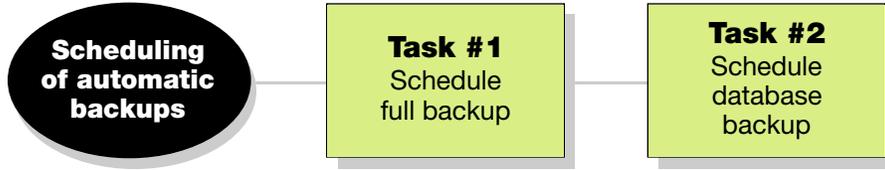
Task #	Task description	Where to find information
1.	Create new real-time displays	<ul style="list-style-type: none"><li>Supervisor's Guide</li></ul>

# Phase 17: Creation of customized reports (optional)



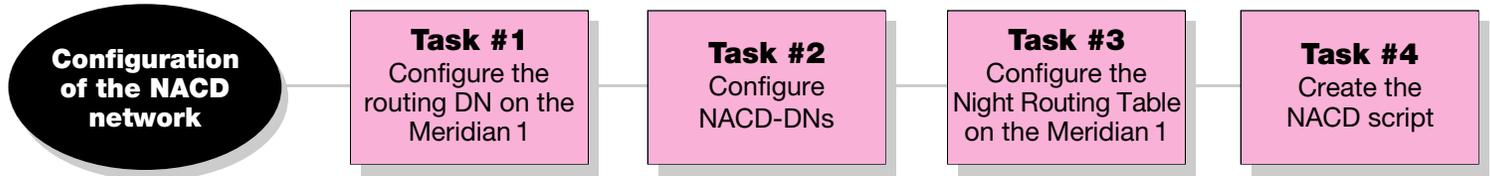
Task #	Task description	Tasks involved	Where to find information
1.	Create reports	You can create the following types of reports: <ul style="list-style-type: none"> <li>• user-defined reports (reports that use a standard report template)</li> <li>• user-created reports, including               <ul style="list-style-type: none"> <li>- custom reports (reports created by modifying a standard report template)</li> <li>- expert reports (reports created in a standard report writer)</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Setup Guide Package</li> <li>• Supervisor's Guide</li> <li>• Historical Reporting and Data Dictionary</li> </ul>
2.	Import user-created reports	Import custom and expert reports created in Crystal Reports	<ul style="list-style-type: none"> <li>• Historical Reporting and Data Dictionary</li> </ul>
3.	Define report properties	Define the report schedule and other properties	<ul style="list-style-type: none"> <li>• Supervisor's Guide</li> </ul>
4.	Activate the report schedule	Activate scheduled reports	<ul style="list-style-type: none"> <li>• Supervisor's Guide</li> </ul>
<b>Note:</b> To create custom reports, you must have Crystal Reports on another SQL- and ODBC-compliant report writer installed on the client PC.			

# Phase 18: Scheduling of automatic backups



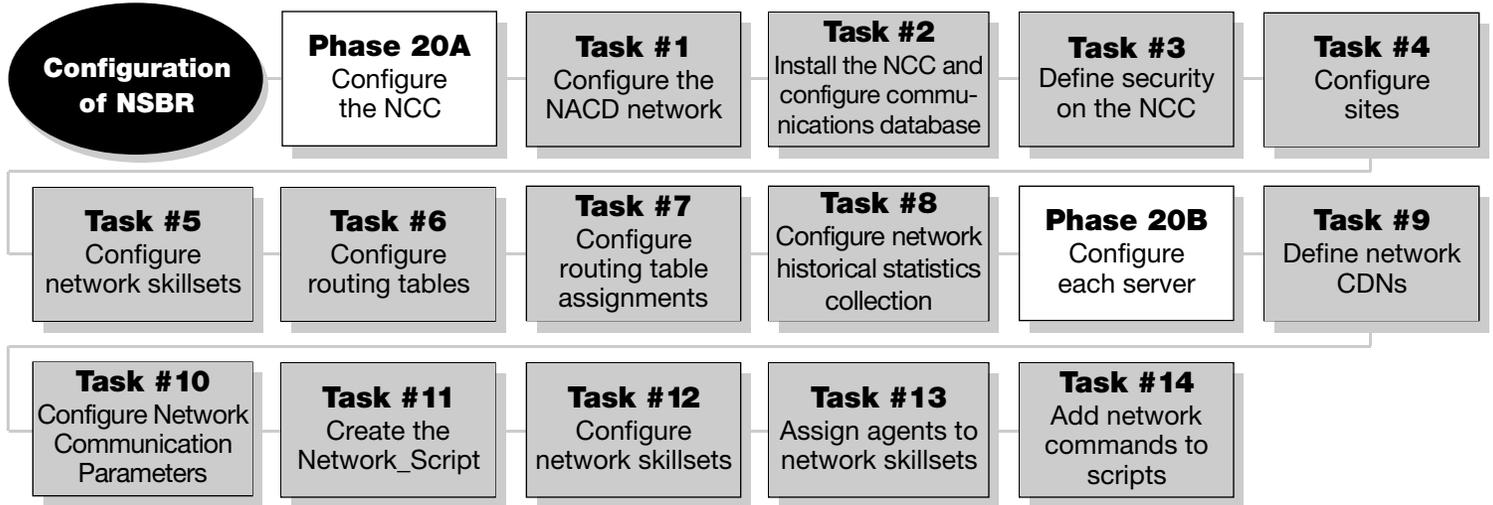
Task #	Task description	Where to find information
1.	Schedule full backup	• Administrator's Guide
2.	Schedule database backup	• Administrator's Guide

# Phase 19: Configuration of the NACD network (optional)



Task #	Task description	Tasks involved	Where to find information
1.	Configure the routing DN on the Meridian 1	Configure the routing DN on the Meridian 1	<ul style="list-style-type: none"> <li>Symposium, M1, and Voice Processing Guide</li> </ul>
2.	Configure NACD-DNs	Configure NACD-DNs on the Meridian 1	<ul style="list-style-type: none"> <li>Symposium, M1, and Voice Processing Guide</li> </ul>
3.	Configure the Night Routing Table on the Meridian 1	a. Identify the routing DN b. Identify the target DN c. Specify the overflow time	<ul style="list-style-type: none"> <li>Symposium, M1, and Voice Processing Guide</li> </ul>
4.	Create the NACD script	a. Create the NACD script using the Advanced set of commands b. Modify the NACD script to identify the routing DN c. Validate, activate, and test the script (see Phase 14, tasks 5 to 11)	<ul style="list-style-type: none"> <li>Symposium, M1, and Voice Processing Guide</li> <li>Scripting Guide</li> </ul>

# Phase 20: Configuration of NSBR (optional)



Task #	Task description	Where to find information
<b>Phase 20A</b>	Configure the NCC	
<b>1.</b>	Configure the NACD network (see Phase 19)	
<b>2.</b>	Install the NCC (see Phase 2) and configure the communications database	<ul style="list-style-type: none"> <li>• Network Control Center Administrator's Guide</li> <li>• Software Installation and Upgrade Guide Package</li> </ul>

## Phase 20: Configuration of NSBR (cont.)

Task #	Task description	Where to find information
3.	Define security on the NCC	<ul style="list-style-type: none"> <li>• Setup Guide Package</li> <li>• Administrator's Guide</li> </ul>
4.	Configure sites	<ul style="list-style-type: none"> <li>• Network Control Center Administrator's Guide</li> <li>• Setup Guide Package</li> </ul>
5.	Configure network skillsets	<ul style="list-style-type: none"> <li>• Network Control Center Administrator's Guide</li> <li>• Setup Guide Package</li> </ul>
6.	Configure routing tables	<ul style="list-style-type: none"> <li>• Network Control Center Administrator's Guide</li> <li>• Setup Guide Package</li> </ul>
7.	Configure routing table assignments	<ul style="list-style-type: none"> <li>• Network Control Center Administrator's Guide</li> <li>• Setup Guide Package</li> </ul>
8.	Configure network historical statistics collection (if you are using the network call-by-call feature)	<ul style="list-style-type: none"> <li>• Network Control Center Administrator's Guide</li> </ul>
<b>Phase 20B</b>	Configure each server	<ul style="list-style-type: none"> <li>• Symposium, M1, and Voice Processing Guide</li> </ul>
9.	Define network CDNs	<ul style="list-style-type: none"> <li>• Network Control Center Administrator's Guide</li> <li>• Setup Guide Package</li> </ul>
10.	Configure Network Communication Parameters	<ul style="list-style-type: none"> <li>• Network Control Center Administrator's Guide</li> </ul>

## Phase 20: Configuration of NSBR (cont.)

Task #	Task description	Where to find information
11.	Create the Network_Script (see Phase 14, tasks 4 to 11)	• Scripting Guide
12.	Configure network skillsets	• Network Control Center Administrator's Guide
13.	Assign agents to network skillsets	• Administrator's Guide
14.	Add network commands to scripts (see Phase 14, tasks 4 to 11)	• Scripting Guide

**Nortel Networks**  
**Symposium Call Center Server**  
**End-To-End Task Flow Guide**  
**for the Meridian 1**

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