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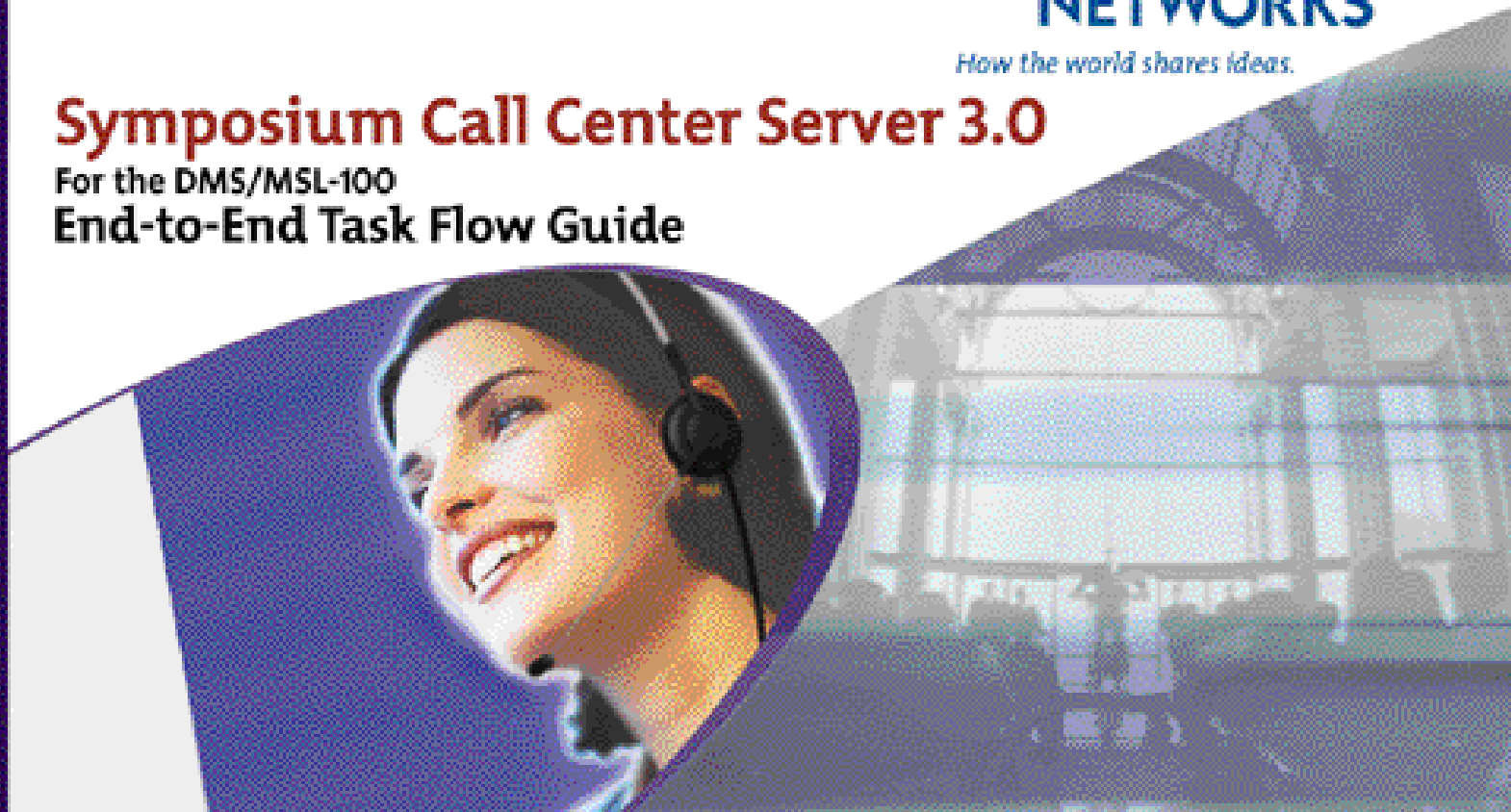
Symposium Call Center Server 3.0

For the DMS/MSL-100

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

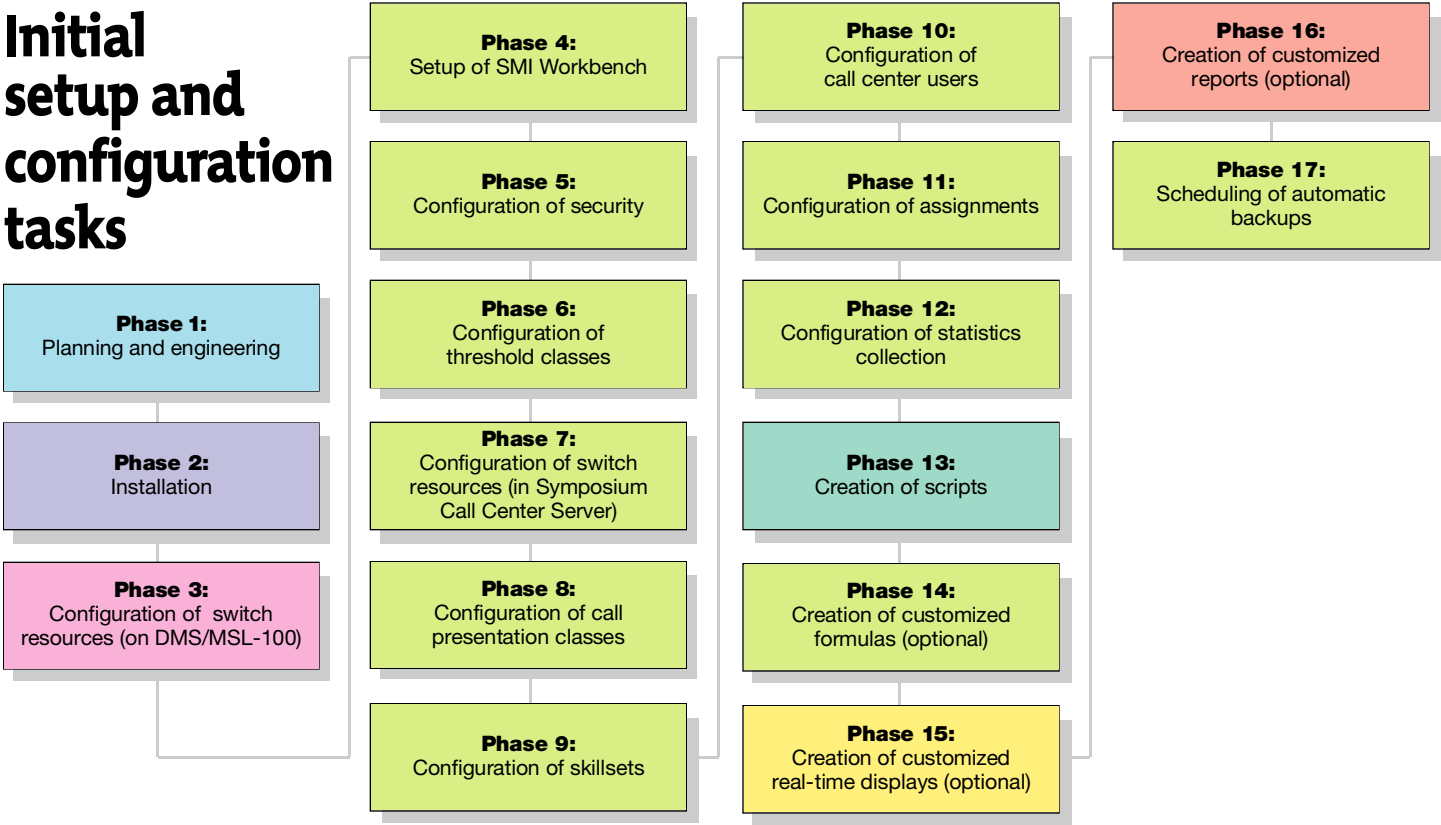
Reference books	Order number
• Planning and Engineering Guide Package	NTPH03AA/ A0807347
• 702t Installation and Maintenance Guide	P0884909
• 1003t Installation and Maintenance Guide	P0911675
• Software Installation and Upgrade Package	NTPH05AA/ A0807353
• Symposium and DMS Switch Guide	P0911815
• Symposium and MSL-100 Switch Guide	P0915664
• Setup Guide Package	NTPH04AA/ A0807348

Reference books	Order number
• Scripting Guide	P0911816
• Scripting Quick Reference Card	P0911817
• Administrator's Guide	P0911818
• Supervisor's Guide	P0910107
• Historical Reporting and Data Dictionary	P0910108

List of abbreviations

ACD	Automatic Call Distribution
CDN	Controlled Directory Number
DN	Directory Number
DNIS	Dialed Number Identification Service
ICM	Intelligent Call Manager
ODBC	Open Database Connectivity
RAN	Recorded Announcement
SQL	Structured Queue Language
VSDN	Voice Service Directory Number

Initial setup and configuration tasks



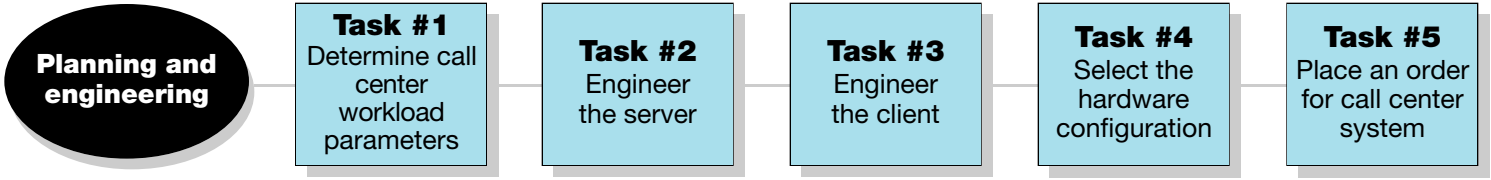
Initial setup and configuration tasks

Phase #	Tasks	Where to find information
1.	Planning and engineering	• Planning and Engineering Guide Package
2.	Installation	• Hardware Installation Guides
		• Software Installation and Upgrade Guide Package
3.	Configuration of switch resources (on DMS/MSL-100)	• Symposium and DMS Switch Guide
		• Symposium and MSL-100 Switch Guide
4.	Setup of SMI workbench	• Software Installation and Upgrade Guide Package
		• Administrator's Guide
5.	Configuration of security	• Setup Guide Package
		• Administrator's Guide
6.	Configuration of threshold classes	• Setup Guide Package
		• Administrator's Guide
7.	Configuration of switch resources (in Symposium Call Center Server)	• Setup Guide Package
		• Administrator's Guide
8.	Configuration of call presentation classes	• Setup Guide Package
		• Administrator's Guide
9.	Configuration of skillsets	• Setup Guide Package
		• Administrator's Guide

Initial setup and configuration tasks (cont.)

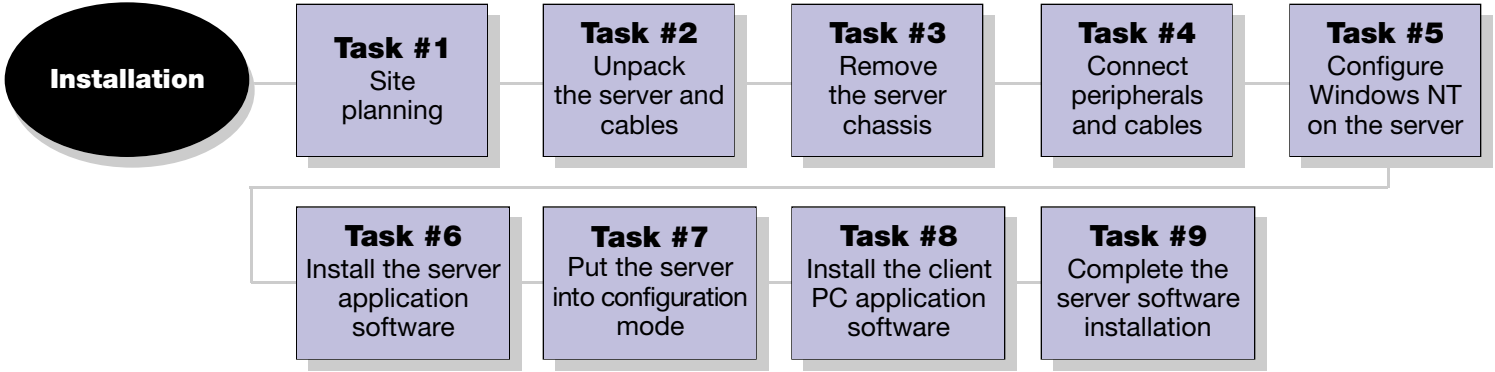
Phase #	Tasks	Where to find information
10.	Configuration of call center users	• Setup Guide Package • Administrator's Guide
11.	Configuration of assignments	• Setup Guide Package • Administrator's Guide
12.	Configuration of statistics collection	• Setup Guide Package • Administrator's Guide
13.	Creation of scripts	• Scripting Guide
14.	Creation of customized formulas (optional)	• Administrator's Guide
15.	Creation of customized real-time displays (optional)	• Supervisor's Guide
16.	Creation of customized reports (optional)	• Historical Reporting and Data Dictionary • Supervisor's Guide
17.	Scheduling of automatic backups	• Administrator's Guide

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: • using Cap Tool • using formulas	• Planning and Engineering Guide Package
3.	Engineer the client	Determine client hardware configuration	• Planning and Engineering Guide Package
4.	Select the hardware configuration	Determine hardware configuration	• Planning and Engineering Guide Package
5.	Place an order for a call center system		

Phase 2: Installation

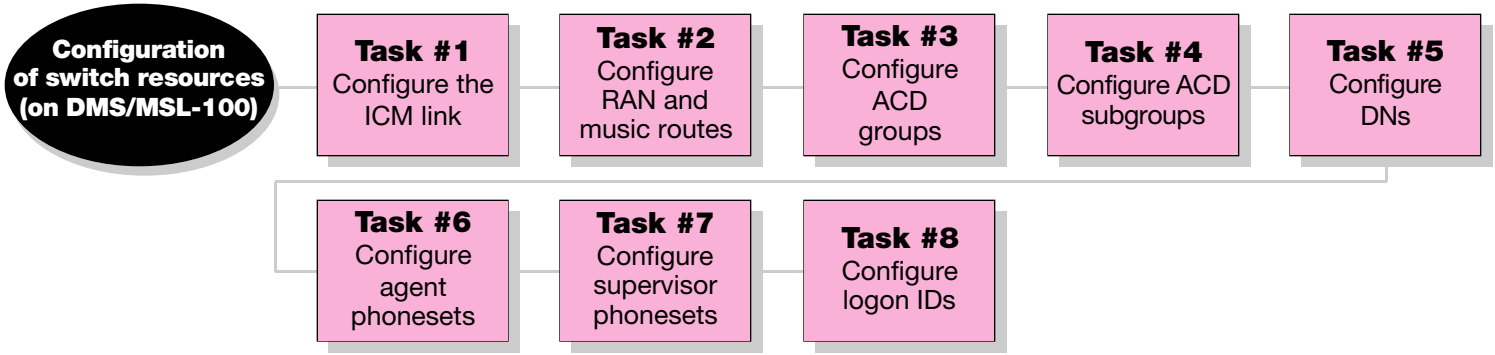


Task #	Task description	Tasks involved	Where to find information
1.	Site planning	a. Review checklists for tools and customer-supplied equipment b. Gather IP addresses and other data for installation	• Hardware Installation Guides • Software Installation and Upgrade Guide Package
2.	Unpack the server and cables	a. Unpack the server b. Prepare cables for the switch, server, and hub	• Hardware Installation Guides
3.	Remove the server chassis	Remove the chassis cover and inspect the interior	• Hardware Installation Guides

Phase 2: Installation (cont.)

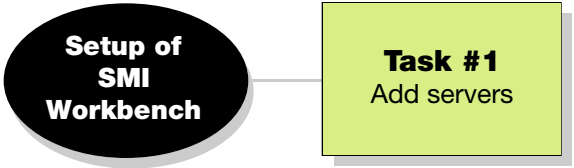
Task #	Task description	Tasks involved	Where to find information
4.	Connect peripherals and cables	a. Install the mouse, keyboard, monitor, and modem b. Attach cables c. Power up the server	• Hardware Installation Guides
5.	Configure Windows NT on the server	Configure network services and set local parameters	• Software Installation and Upgrade Guide Package
6.	Install the server application software	Install platform and call center applications software	• Software Installation and Upgrade Guide Package
7.	Put the server into configuration mode	Place the server in configuration mode to allow client installation and server configuration from the client PC	• Software Installation and Upgrade Guide Package
8.	Install the client PC application software	Install client applications on the client PC	• Software Installation and Upgrade Guide Package
9.	Complete the server software installation	a. Return to the server software installation b. Complete the server installation	• Software Installation and Upgrade Guide Package

Phase 3: Configuration of switch resources (on DMS/MSL-100)



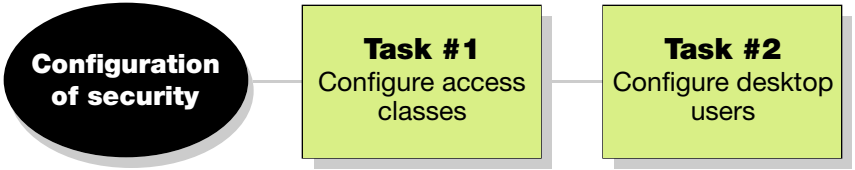
Task #	Task description	Where to find information
1.	Configure the ICM link	• Symposium and DMS Switch Guide
2.	Configure RAN and music routes	• Symposium and DMS Switch Guide
3.	Configure ACD groups	• Symposium and DMS Switch Guide
4.	Configure ACD subgroups	• Symposium and DMS Switch Guide
5.	Configure DNs	• Symposium and DMS Switch Guide
6.	Configure agent phonesets	• Symposium and DMS Switch Guide
7.	Configure supervisor phonesets	• Symposium and DMS Switch Guide
8.	Configure logon IDs	• Symposium and DMS Switch Guide

Phase 4: Setup of SMI Workbench



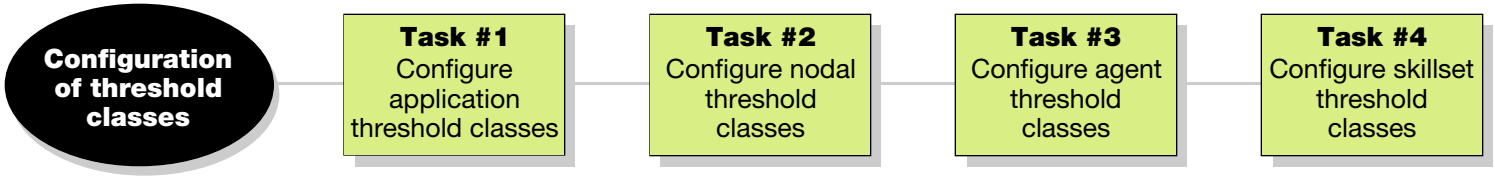
Task #	Task description	Where to find information
1.	Add servers	• Software Installation and Upgrade Guide Package • Administrator's Guide

Phase 5: Configuration of security



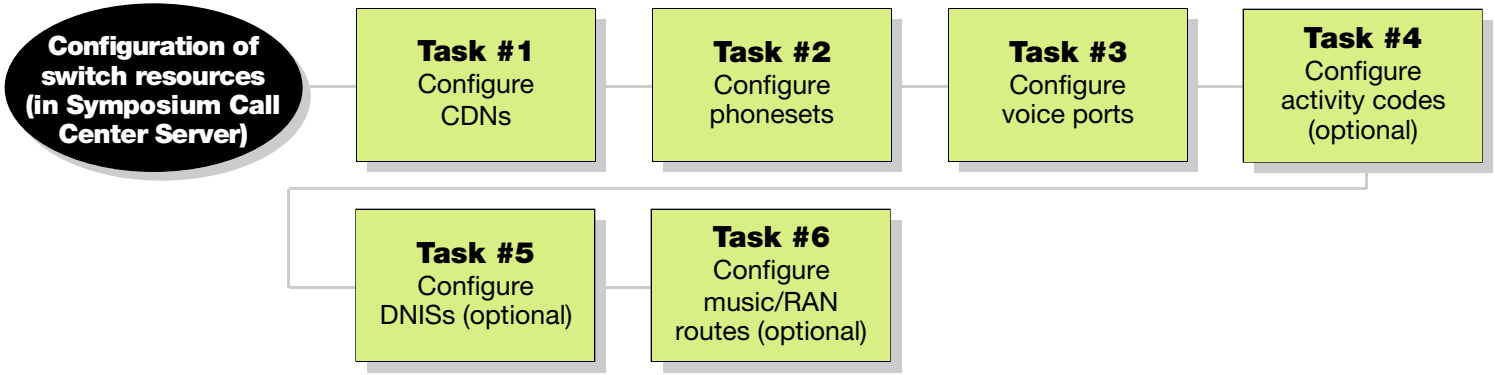
Task #	Task description	Where to find information
1.	Configure access classes	• Setup Guide Package • Administrator's Guide
2.	Configure desktop users (users who can access Symposium Call Center Server functions from a client PC)	• Setup Guide Package • Administrator's Guide

Phase 6: Configuration of threshold classes



Task #	Task description	Where to find information
1.	Configure application threshold classes	• Setup Guide Package • Administrator's Guide
2.	Configure nodal threshold classes	• Setup Guide Package • Administrator's Guide
3.	Configure agent threshold classes	• Setup Guide Package • Administrator's Guide
4.	Configure skillset threshold classes	• Setup Guide Package • Administrator's Guide

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

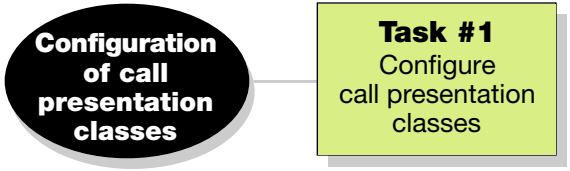


Task #	Task description	Tasks involved	Where to find information
1.	Configure CDNs	a. Configure a CDN b. Check configuration on the switch c. Acquire the CDN d. Test the CDN	• Setup Guide Package • Administrator's Guide
2.	Configure phonesets	a. Configure a phoneset b. Check configuration on the switch c. Acquire the phoneset d. Test the phoneset	• Setup Guide Package • Administrator's Guide

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

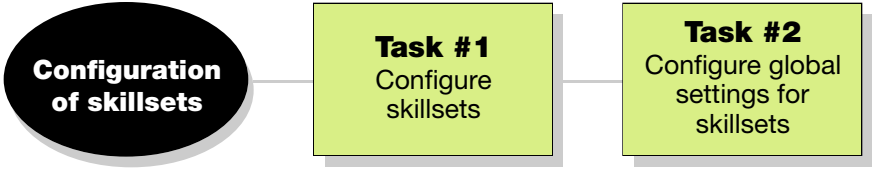
Task #	Task description	Tasks involved	Where to find information
3.	Configure voice ports	a. Configure a voice port b. Check configuration on the switch c. Acquire the voice port d. Test the voice port	• Setup Guide Package • Administrator's Guide
4.	Configure activity codes (optional)	Configure activity codes	• Setup Guide Package • Administrator's Guide
5.	Configure DNISs (optional)	Configure DNISs	• Setup Guide Package • Administrator's Guide
6.	Configure music/RAN routes (optional)	a. Configure a route b. Check configuration on the switch c. Acquire the route	• Setup Guide Package • Administrator's Guide

Phase 8: Configuration of call presentation classes



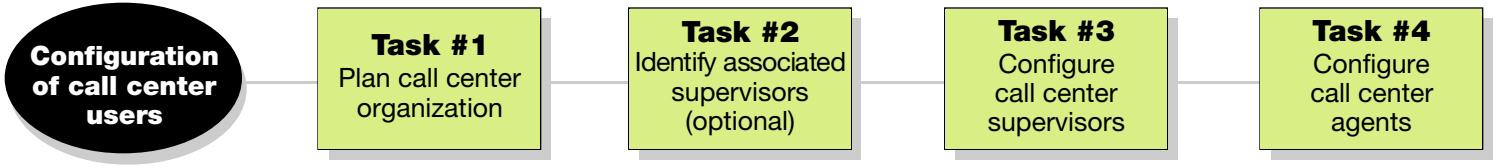
Task #	Task description	Where to find information
1.	Configure call presentation classes	• Setup Guide Package • Administrator's Guide

Phase 9: Configuration of skillsets



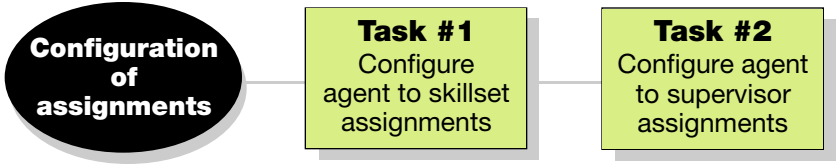
Task #	Task description	Where to find information
1.	Configure skillsets	• Setup Guide Package • Administrator's Guide
2.	Configure global settings for skillsets	• Setup Guide Package • Administrator's Guide

Phase 10: Configuration of call center users



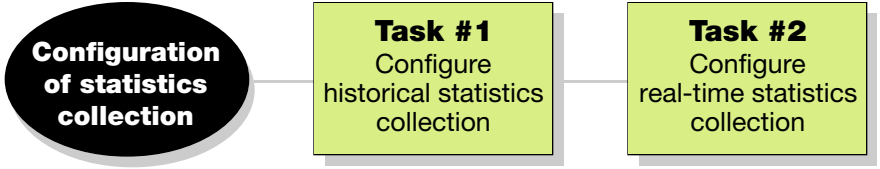
Task #	Task description	Tasks involved	Where to find information
1.	Plan call center organization	Identify supervisors and reporting agents	• Setup Guide Package • Administrator's Guide
2.	Identify associated supervisors (optional)	Assign backup supervisors to agents	• Setup Guide Package • Administrator's Guide
3.	Configure call center supervisors	Define supervisors on the server	• Setup Guide Package • Administrator's Guide
4.	Configure call center agents	Define agents on the server	• Setup Guide Package • Administrator's Guide

Phase 11: Configuration of assignments



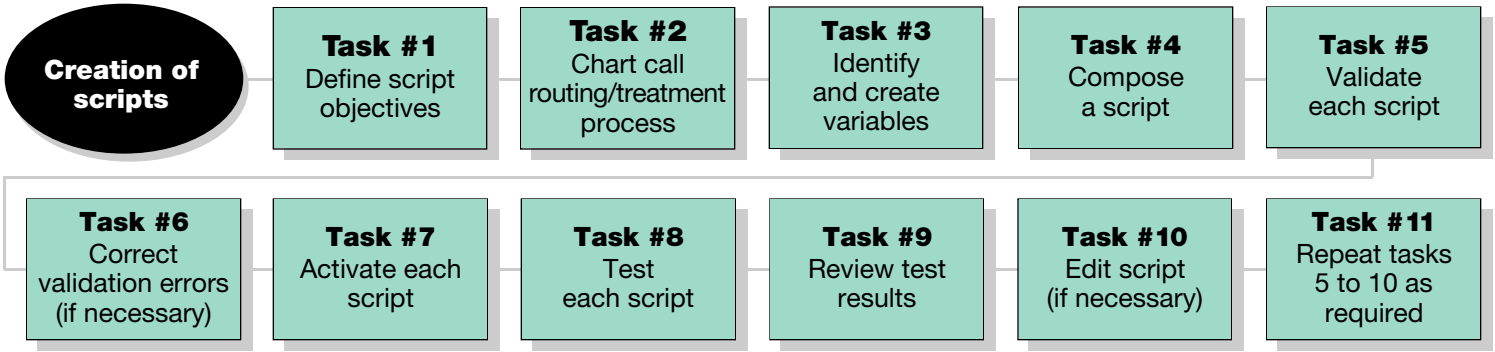
Task #	Task description	Where to find information
1.	Configure agent to skillset assignments	• Setup Guide Package • Administrator's Guide
2.	Configure agent to supervisor assignments	• Setup Guide Package • Administrator's Guide

Phase 12: Configuration of statistics collection



Task #	Task description	Tasks involved	Where to find information
1.	Configure historical statistics collection	Choose • the types of statistics to be collected • how long statistics are stored • applications for which call-by-call statistics are collected	• Setup Guide Package • Administrator's Guide
2.	Configure real-time statistics collection	Choose the types of statistics to be collected and the refresh rates	• Setup Guide Package • Administrator's Guide

Phase 13: Creation of scripts

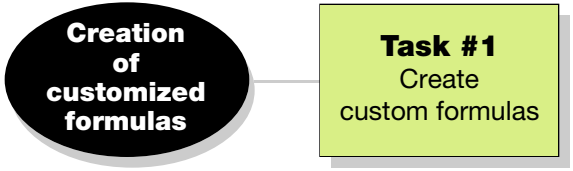


Task #	Task description	Tasks involved	Where to find information
1.	Define script objectives	Define script objectives	• Scripting Guide
2.	Chart call routing/ treatment process	Chart the call routing/treatment process	• Scripting Guide
3.	Identify and create variables	Identify and create needed variables	• Scripting Guide
4.	Compose a script	Compose a script in one of the following ways: • Use sample scripts provided with Symposium Call Center Server • Enter the text manually • Copy parts of other scripts	• Scripting Guide

Phase 13: Creation of scripts (cont.)

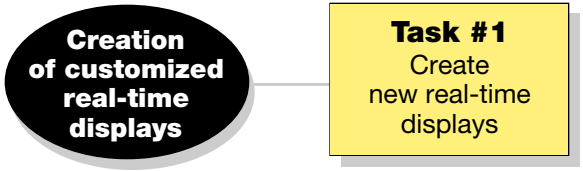
Task #	Task description	Tasks involved	Where to find information
5.	Validate each script	Validate each script	• Scripting Guide
6.	Correct validation errors (if necessary)	Correct validation errors	• Scripting Guide
7.	Activate each script	Activate each script	• Scripting Guide
8.	Test each script	Test 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 script (if necessary)		
11.	Repeat tasks 5 to 10 as required		

Phase 14: Creation of customized formulas (optional)



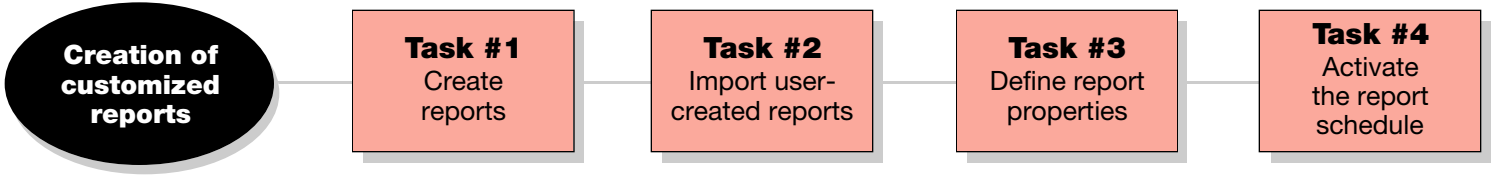
Task #	Task description	Tasks involved	Where to find information
1.	Create custom formulas	Create custom formulas for use in real-time displays	• Administrator's Guide

Phase 15: Creation of customized real-time displays (optional)



Task #	Task description	Where to find information
1.	Create new real-time displays	• Supervisor's Guide

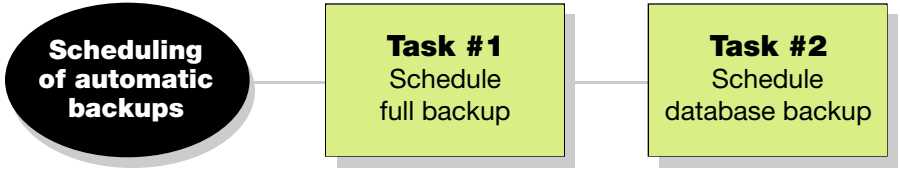
Phase 16: Creation of customized reports (optional)



Task #	Task description	Tasks involved	Where to find information
1.	Create reports	You can create the following types of reports: • user-defined reports (reports that use a standard report template) • user-created reports, including - custom reports (reports created by modifying a standard report template) - expert reports (reports created in a standard report writer)	• Setup Guide Package • Supervisor's Guide • Historical Reporting and Data Dictionary
2.	Import user-created reports	Import custom and expert reports created in Crystal Reports	• Historical Reporting and Data Dictionary
3.	Define report properties	Define the report schedule and other properties	• Supervisor's Guide
4.	Activate the report schedule	Activate scheduled reports	• Supervisor's Guide

Note: To create custom reports, you must have Crystal Reports on another SQL- and ODBC-compliant report writer installed on the client PC.

Phase 17: 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

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for the DMS/MSL-100

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

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