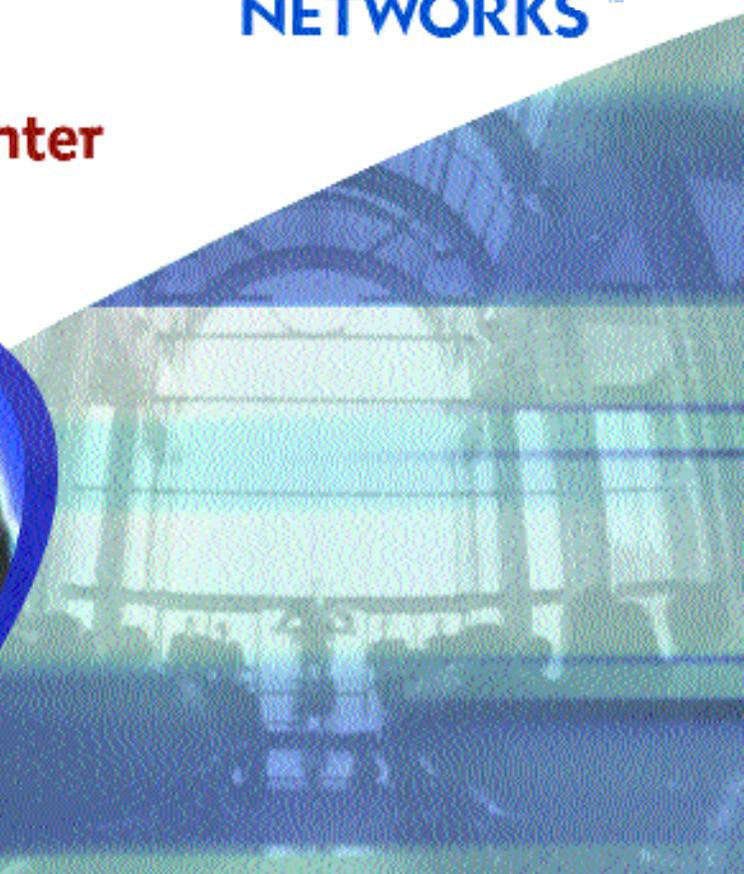# NORTEL NETWORKS ™

Symposium Express Call Center
End-to-End Task Flow

Introduction to Symposium Express Call Center

The call center solution

Nortel Networks' Symposium Express Call Center provides a call center solution for call centers with 150 or fewer agents. Symposium Express Call Center offers 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

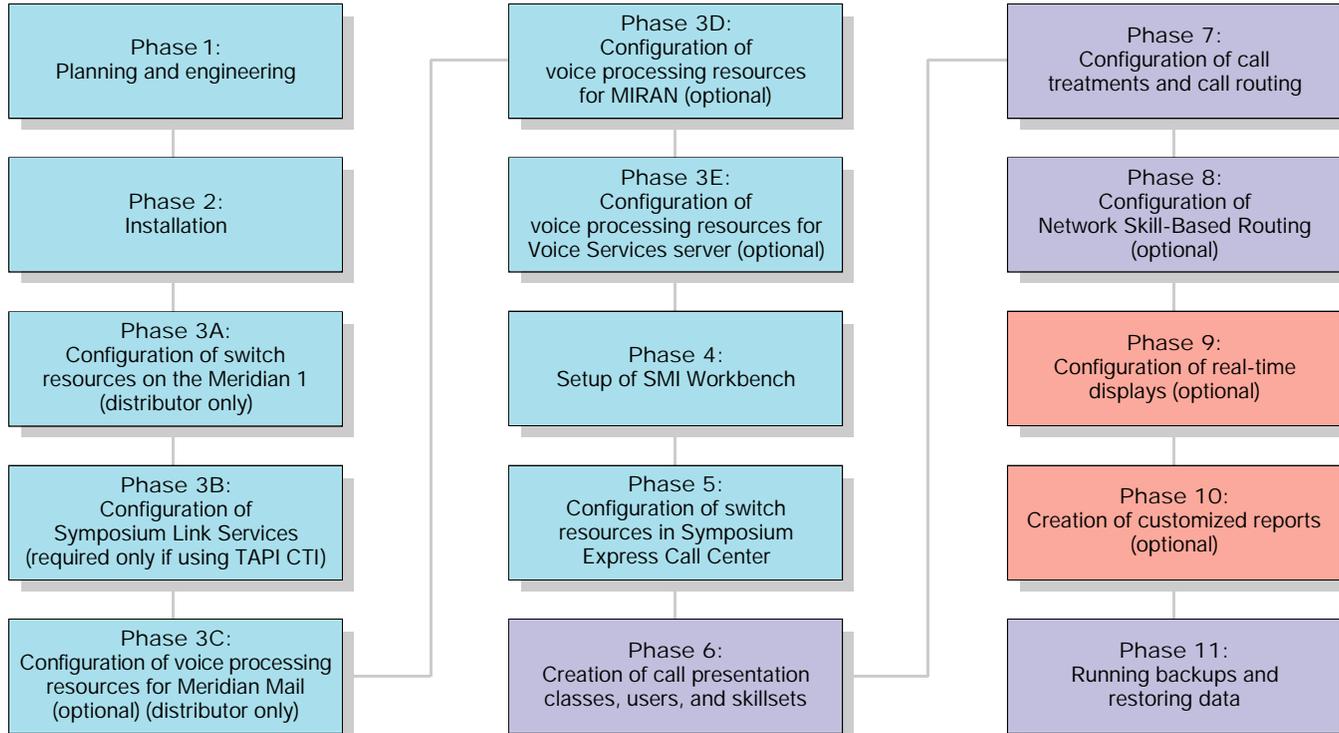| Reference books	Order number
• Planning, Installation, and Administration Guide (distributor only)	P0913583
• Call Center Management Guide	P0913584
• Online Tutorials	
• Online Help	
• Reports and Displays Guide	P0913585

List of abbreviations

ACD	Automatic Call Distribution
CDN	Controlled Directory Number
CLAN	Customer Local Area Network
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
NCC	Network Control Center
ODBC	Open Database Connectivity
VSDN	Voice Service Directory Number

What's new in Release 3.0

- **Voice Services (optional, only if purchased)**
  Use Voice Services cards for more cost-effective voice processing services.
- **Estimated Wait Time and Position in Queue (optional, only if purchased)**
  Play Estimated Wait Time and Position in Queue messages to callers while they wait.
- **Network Skill-Based Routing (optional, only if purchased)**
  Route calls to remote skillsets.
- **Call priority**
  Set low, medium, or high priority status for calls within skillsets.
- **Senior supervisor user type**
  Senior supervisors can view the status of all agents in the call center.
- **Activity codes**
  Use activity codes to track the types of calls agents are taking.
- **Calls waiting, busy, and overflow by number thresholds**
  Flash calls waiting lamp, give busy or overflow treatment based on the number of calls waiting.
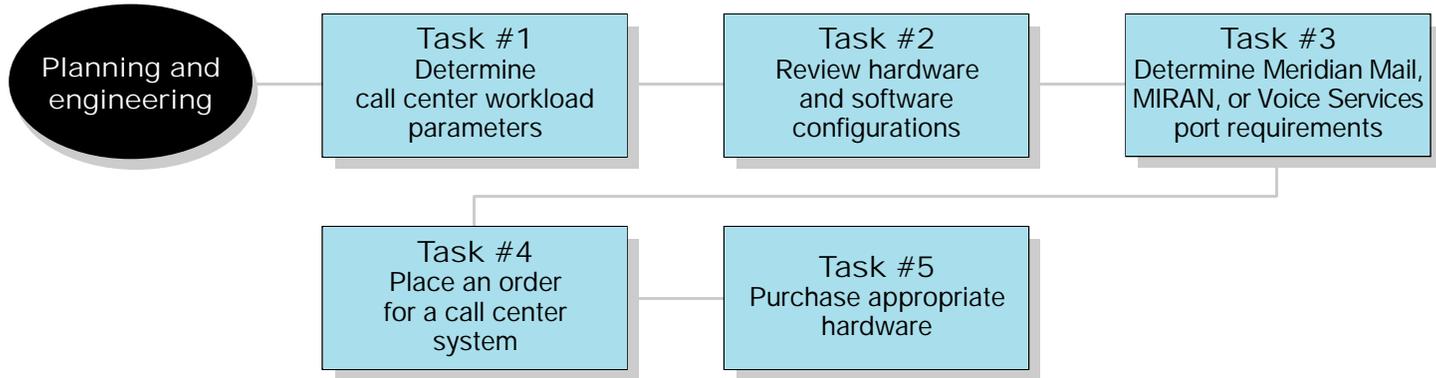
3

Initial setup and configuration tasks

Phase 1:
Planning and engineering

Phase 2:
Installation

Phase 3A:
Configuration of switch resources on the Meridian 1 (distributor only)

Phase 3B:
Configuration of Symposium Link Services (required only if using TAPI CTI)

Phase 3C:
Configuration of voice processing resources for Meridian Mail (optional) (distributor only)

Phase 3D:
Configuration of voice processing resources for MIRAN (optional)

Phase 3E:
Configuration of voice processing resources for Voice Services server (optional)

Phase 4:
Setup of SMI Workbench

Phase 5:
Configuration of switch resources in Symposium Express Call Center

Phase 6:
Creation of call presentation classes, users, and skillsets

Phase 7:
Configuration of call treatments and call routing

Phase 8:
Configuration of Network Skill-Based Routing (optional)

Phase 9:
Configuration of real-time displays (optional)

Phase 10:
Creation of customized reports (optional)

Phase 11:
Running backups and restoring data

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Initial setup and configuration tasks

Phase #	Tasks	Where to find information
1.	Planning and engineering	• Planning, Installation, and Administration Guide (distributor only)
2.	Installation	
3A/B/C/D/E.	Configuration of • switch resources on the Meridian 1 • Symposium Link Services (required only if using TAPI CTI) • voice processing resources for Meridian Mail (optional) • voice processing resources for MIRAN (optional) • voice processing resources for Voice Services server (optional)	
4.	Setup of SMI workbench	
5.	Configuration of switch resources in Symposium Express Call Center	
6.	Creation of call presentation classes, users, and skillsets	• Call Center Management Guide • Online Help and tutorials
7.	Configuration of call treatments and call routing	
8.	Configuration of Network Skill-Based Routing (optional)	

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Initial setup and configuration tasks (cont.)

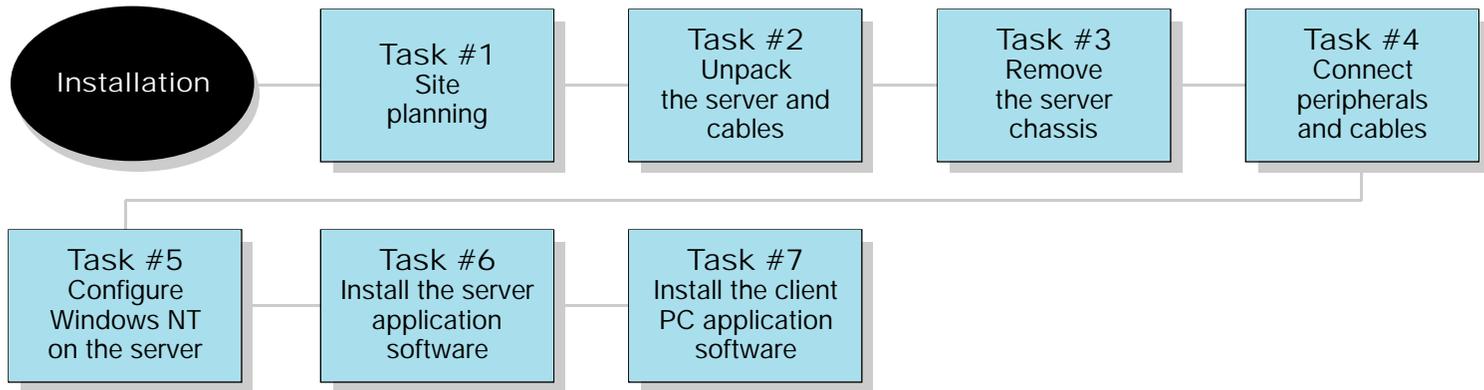| Phase #	Tasks	Where to find information
9.	Configuration of real-time displays (optional)	• Reports and Displays Guide
10.	Creation of customized reports (optional)	• Online Help and tutorials
11.	Running of backups and restoring data	• Planning, Installation, and Administration Guide (distributor only) • Call Center Management Guide

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Phase 1: Planning and engineering

```
┌──────────────┐   ┌──────────────────┐   ┌──────────────────┐   ┌──────────────────────┐
( Planning and  )   │     Task #1      │   │     Task #2      │   │       Task #3        │
( engineering   )   │    Determine     │   │ Review hardware  │   │ Determine Meridian   │
└──────────────┘    │ call center      │   │   and software   │   │ Mail, MIRAN, or      │
                    │   workload       │   │  configurations  │   │ Voice Services       │
                    │   parameters     │   │                  │   │ port requirements    │
                    └──────────────────┘   └──────────────────┘   └──────────────────────┘
```

Planning and engineering

Task #1 Determine call center workload parameters

Task #2 Review hardware and software configurations

Task #3 Determine Meridian Mail, MIRAN, or Voice Services port requirements

Task #4 Place an order for a call center system

Task #5 Purchase appropriate hardware

Task #	Task description	Tasks involved	Where to find information
1.	Determine call center workload parameters	Determine values for workload parameters	• Planning, Installation, and Administration Guide (distributor only)
2.	Review hardware and software configurations	Determine hardware and software requirements for your call center workload	

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Phase 1: Planning and engineering (cont.)

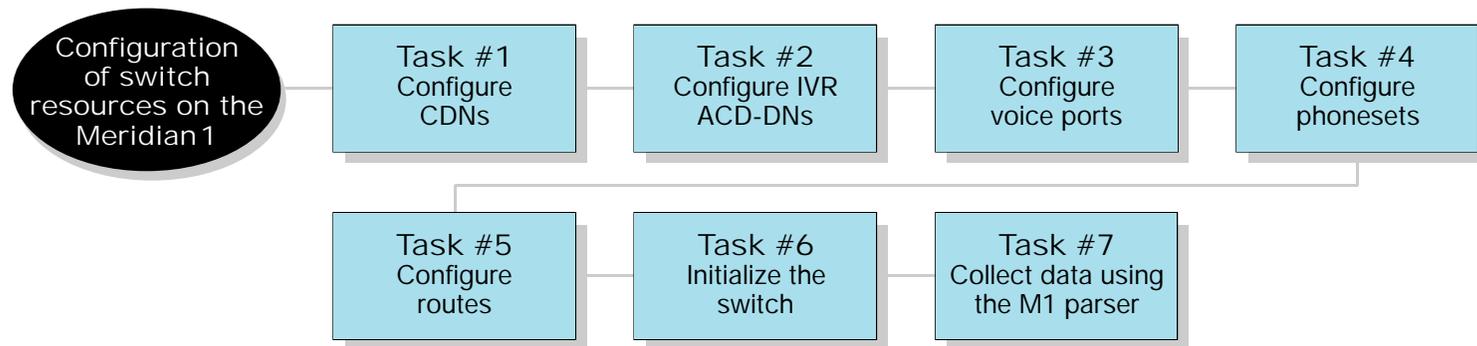| Task #	Task description	Tasks involved	Where to find information
3.	Determine Meridian Mail, MIRAN, or Voice Services port requirements	Determine requirements (**Note:** Symposium Express Call Center cannot share switch resources with other applications, such as Meridian Max.)	• Planning, Installation, and Administration Guide (distributor only)
4.	Place an order for call center system		
5.	Purchase appropriate hardware		

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Phase 2: Installation

```
┌─────────────┐   ┌──────────────┐   ┌──────────────┐   ┌──────────────┐   ┌──────────────┐
│ Installation│───│  Task #1     │───│  Task #2     │───│  Task #3     │───│  Task #4     │
│             │   │  Site        │   │  Unpack      │   │  Remove      │   │  Connect     │
│             │   │  planning    │   │  the server  │   │  the server  │   │  peripherals │
│             │   │              │   │  and cables  │   │  chassis     │   │  and cables  │
└─────────────┘   └──────────────┘   └──────────────┘   └──────────────┘   └──────────────┘

┌──────────────┐   ┌──────────────┐   ┌──────────────┐
│  Task #5     │───│  Task #6     │───│  Task #7     │
│  Configure   │   │  Install the │   │  Install the │
│  Windows NT  │   │  server      │   │  client      │
│  on the      │   │  application │   │  PC          │
│  server      │   │  software    │   │  application │
│              │   │              │   │  software    │
└──────────────┘   └──────────────┘   └──────────────┘
```

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	• Planning, Installation, and Administration Guide (distributor only)
2.	Unpack the server and cables	a. Unpack the server b. Prepare cables for the switch, server, and hub	• For hardware setup and configuration, refer to the hardware documentation

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Phase 2: Installation (cont.)

Task #	Task description	Tasks involved	Where to find information
3.	Remove the server chassis	Remove the chassis cover and inspect the interior	• Planning, Installation, and Administration Guide (distributor only)
4.	Connect peripherals and cables	a. Install the mouse, keyboard, monitor, and modem b. Attach cables c. Power up the server	• For hardware setup and configuration, refer to the hardware documentation
5.	Configure Windows NT on the server	Configure network services and set local parameters	
6.	Install the server application software	Install Symposium Express Call Center server application software	
7.	Install the client PC application software	Install client application on the server computer, and (optionally) on additional client PCs	

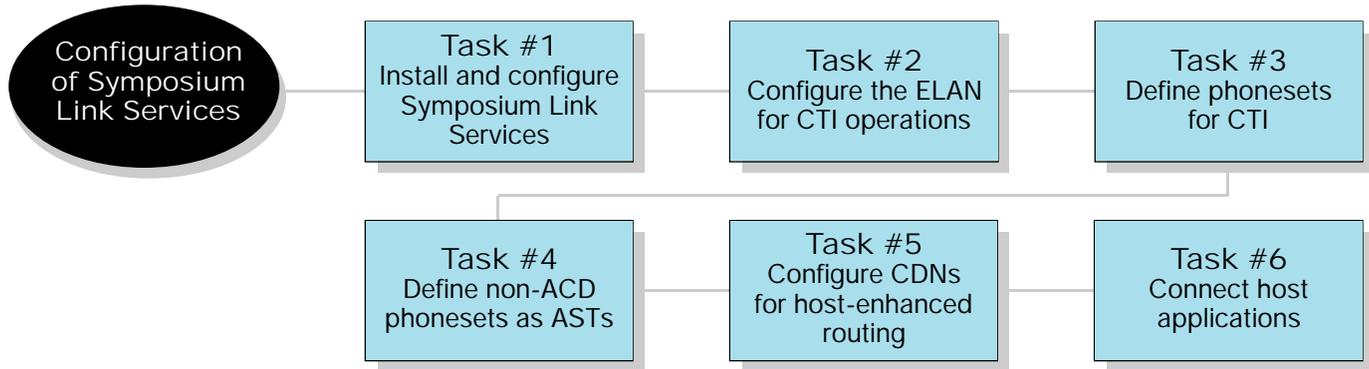# Phase 3A: Configuration of switch resources on the Meridian 1 (distributor only)

Configuration of switch resources on the Meridian 1

Task #1
Configure CDNs

Task #2
Configure IVR ACD-DNs

Task #3
Configure voice ports

Task #4
Configure phonesets

Task #5
Configure routes

Task #6
Initialize the switch

Task #7
Collect data using the M1 parser

Task #	Task description	Tasks involved	Where to find information
1.	Configure CDNs		• Meridian 1 documentation
2.	Configure IVR ACD-DNs	Configure IVR ACD-DNs (if you are using IVR)	• Planning, Installation, and Administration Guide
3.	Configure voice ports	Configure voice ports (if you are using Meridian Mail, MIRAN, or Voice Services)	
4.	Configure phonesets		

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Phase 3A: Configuration of switch resources on the Meridian 1 (distributor only) (cont.)

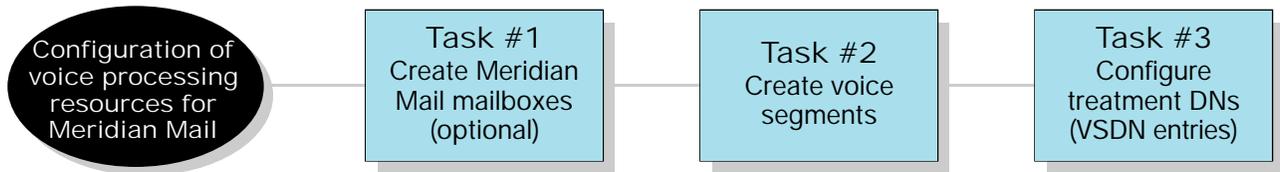| Task #	Task description	Tasks involved	Where to find information
5.	Configure routes	Configure routes (if you are using NSBR or NACD to route calls between sites)	• Meridian 1 documentation • Planning, Installation, and Administration Guide
6.	Initialize the switch		
7.	Collect data using the M1 parser	Collect switch resource data into a text file using terminal emulation software. Then run M1 data parser to import switch resource data into Symposium Express Call Center.	• Planning, Installation, and Administration Guide (distributor only)

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Phase 3B: Configuration of Symposium Link Services
(required only if using TAPI CTI)

Configuration of Symposium Link Services

Task #1
Install and configure Symposium Link Services

Task #2
Configure the ELAN for CTI operations

Task #3
Define phonesets for CTI

Task #4
Define non-ACD phonesets as ASTs

Task #5
Configure CDNs for host-enhanced routing

Task #6
Connect host applications

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

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Phase 3C: Configuration of voice processing resources for Meridian Mail (optional) (distributor only)

```
┌──────────────┐     ┌──────────────┐   ┌──────────────┐   ┌──────────────┐
│ Configuration of │  │  Task #1     │   │  Task #2     │   │  Task #3     │
│ voice processing │──│ Create Meridian │─│ Create voice │─│ Configure    │
│ resources for    │  │ Mail mailboxes  │ │ segments     │ │ treatment DNs│
│ Meridian Mail    │  │ (optional)      │ │              │ │ (VSDN entries)│
└──────────────┘     └──────────────┘   └──────────────┘   └──────────────┘
```

Note: This phase is required if you are using Meridian Mail for voice processing.

Task #	Task description	Tasks involved	Where to find information
1.	Create Meridian Mail mailboxes (optional)		• Meridian Mail documentation • Symposium, M1, and Voice Processing Guide
2.	Create voice segments	Create Meridian Mail or Voice Services voice segments (only if using Expected Wait Time or Position in Queue)	
3.	Configure treatment DNs (VSDN entries)	Required only for Meridian Mail comfort announcements	

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Phase 3D: Configuration of voice processing resources for MIRAN (optional)

Task #	Task description	Tasks involved	Where to find information
1.	Install the MIRAN card(s)	Install the MIRAN card(s) on the Meridian 1	• MIRAN documentation
2.	Import configuration information into Symposium Express Call Center	Collect switch data into a text file using terminal emulation software. Then run the Meridian 1 data parser to import the data into Symposium Express Call Center.	• Symposium, M1, and Voice Processing Guide • Planning, Installation, and Administration Guide
3.	Record MIRAN announcements		

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Phase 3E: Configuration of voice processing resources for Voice Services (optional)

```
┌─────────────────┐   ┌──────────────┐  ┌──────────────┐  ┌──────────────┐  ┌──────────────┐
│  Configuration  │   │   Task #1    │  │   Task #2    │  │   Task #3    │  │   Task #4    │
│ of voice        │   │  Install the │  │   Print      │  │ Import       │  │ Configure    │
│ processing      │──▶│ Voice        │  │ Voice        │  │ configuration│  │ Voice        │
│ resources for   │   │ Services card│  │ Services     │  │ information  │  │ Services     │
│ Voice Services  │   │              │  │ configuration│  │ into         │  │ treatments   │
└─────────────────┘   └──────────────┘  │ information  │  │ Symposium    │  │ and record   │
                                        └──────────────┘  │ Express      │  │ voice        │
                                                          │ Call Center  │  │ segments     │
                                                          └──────────────┘  └──────────────┘
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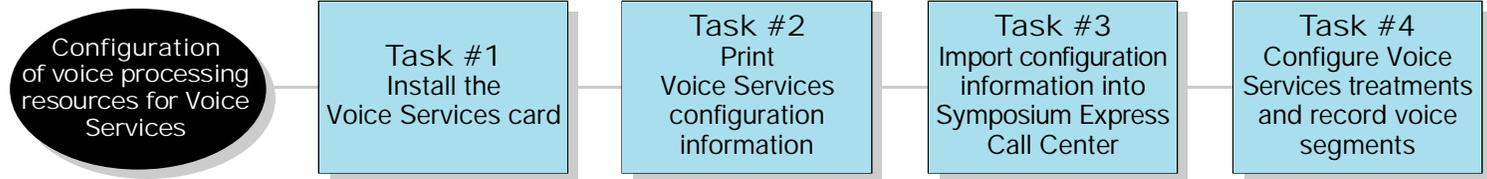
Note: This phase is required if you are using Voice Services for voice processing.

Task #	Task description	Tasks involved	Where to find information
1.	Install the Voice Services card	Install the Voice Services card on the Meridian 1	• Planning, Installation, and Administration Guide
2.	Print Voice Services configuration information	Use overlay 11 to print Voice Services configuration information to a text file	
3.	Import configuration information into Symposium Express Call Center	On the server, use the Voice Services configuration utility to import configuration information into Symposium Express Call Center	
4.	Configure Voice Services treatments and record voice segments	From the Symposium Express Call Center client, configure Voice Services treatments and record voice segments	• Call Center Management Guide

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Phase 4: Setup of SMI Workbench

```
┌─────────────┐          ┌──────────────┐        ┌──────────────┐
│  Setup of   │          │  Task #1     │        │  Task #2     │
│    SMI      │──────────│  Start SMI   │────────│  Add servers │
│  Workbench  │          │  Workbench   │        │              │
└─────────────┘          └──────────────┘        └──────────────┘
```

Task #	Task description	Tasks involved	Where to find information
1.	Start SMI Workbench	From the Windows Start menu, choose Programs → Symposium Express Call Center → SMI Workbench	• Planning, Installation, and Administration Guide
2.	Add servers	Double-click Add System	

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Phase 5: Configuration of switch resources in Symposium Express Call Center

Configuration of switch resources in Symposium Express Call Center

Task #1 Configure CDNs

Task #2 Configure IVR ACD-DNs (optional)

Task #3 Configure phonesets

Task #4 Configure voice ports

Task #5 Configure activity codes (optional)

Task #6 Configure CLID (optional)

Task #7 Configure DNISs (optional)

Task #8 Configure routes (optional)

Task #9 Configure phoneset displays (optional)

Task #10 Name CDNs for reports (optional)
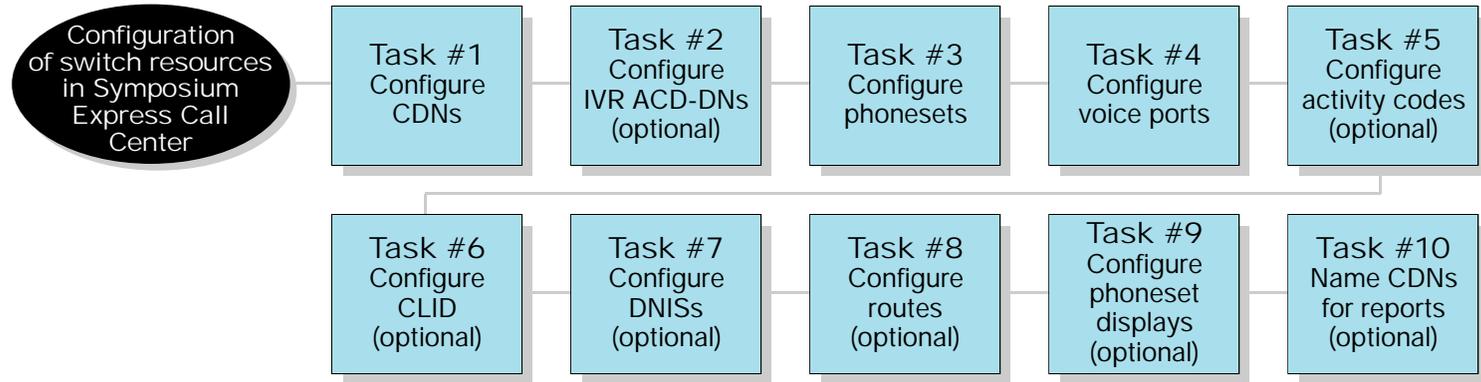
Task #	Task description	Tasks involved	Where to find information
1.	Configure CDNs	a. Configure a CDN* b. Check configuration on the switch c. Acquire the CDN* d. Test the CDN	• Planning, Installation, and Administration Guide
2.	Configure IVR ACD-DNs (optional)	a. Configure an IVR ACD-DN b. Check configuration on the switch c. Acquire the IVR ACD-DN	

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Phase 5: Configuration of switch resources in Symposium Express Call Center (cont.)

Task #	Task description	Tasks involved	Where to find information
3.	Configure phonesets	a. Configure a phoneset* b. Check configuration on the switch c. Acquire the phoneset* d. Test the phoneset	• Planning, Installation, and Administration Guide • Call Center Management Guide (for CDNs, DNs, and phonesets)
4.	Configure voice ports	a. Configure a voice port* b. Check configuration on the switch c. Acquire the voice port* d. Test the voice port	
5.	Configure activity codes (optional)	Configure activity codes	
6.	Configure CLID (optional)	Configure CLID	
7.	Configure DNISs (optional)	Configure DNISs	
8.	Configure routes (optional)	a. Configure a route* b. Check configuration on the switch c. Acquire the route*	
9.	Configure phoneset displays (optional)	Use Advanced functions to configure phoneset displays	
10.	Name CDNs for reports (optional)	Use the CDN naming utility to assign meaningful names to CDNs. The name you assign appears in reports	*If you are using the import utility to get the switch resource information into Symposium Express Call Center, then these steps are not required. 19

Phase 6: Creation of call presentation classes, users, and skillsets

Creation of call presentation classes, users, and skillsets

Task #1 — Add call presentation classes

Task #2 — Add supervisors

Task #3 — Add call center agents

Task #4 — Add skillsets and assign agents

Task #	Task description	Tasks involved	Where to find information
1.	Add call presentation classes	Configure call presentation classes	• Call Center Management Guide • Online Help and tutorials
2.	Add supervisors	Configure supervisors and senior supervisors	
3.	Add call center agents	Configure agent IDs	
4.	Add skillsets and assign agents	Add skillsets and assign agents to them	

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Phase 7: Configuration of call treatments and call routing

```
┌─────────────────┐   ┌──────────┐   ┌──────────┐   ┌──────────┐   ┌──────────┐   ┌──────────┐
│ Configuration   │   │ Task #1  │   │ Task #2  │   │ Task #3  │   │ Task #4  │   │ Task #5  │
│ of call         │   │ Define   │   │ Identify │   │ Configure│   │ Configure│   │ Configure│
│ treatments      │───│ call     │───│ resources│───│ call     │───│ emergency│───│ call     │
│ and call        │   │ center   │   │          │   │ treatments│  │ treatment│   │ routing  │
│ routing         │   │ objectives│  │          │   │          │   │          │   │          │
└─────────────────┘   └──────────┘   └──────────┘   └──────────┘   └──────────┘   └──────────┘
```

Task #	Task description	Tasks involved	Where to find information
1.	Define call center objectives	Define call center objectives	• Get this information from your call center administrator, or by running the configuration report. • Call Center Management Guide
2.	Identify resources	Identify the following resources: • Call center working hours • Holidays • Available skillsets • Available CDNs, DNISs, and CLIDs • Announcement types used by your call center • Available RAN routes • Available announcements and Voice Services segments • Global ceiling • Ceiling for CLID/DNS/CDN	

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Phase 7: Configuration of call treatments and call routing (cont.)

Task #	Task description	Tasks involved	Where to find information
3.	Configure call treatments	Use the Call Treatment wizard to create call treatments. For each treatment, configure • business days and hours • holidays • how calls are handled outside of business hours (out-of-hours) • how calls are handled when the call center is very busy (overflow treatment) • what types of announcements are played, and when • what tones callers hear between announcements	• Call Center Management Guide • Online Help and tutorials
4.	Configure emergency treatment	Configure how calls are handled in the event of an emergency, or when all agents are logged off during business hours	
5.	Configure call routing	Indicate the priority with which calls are routed to local and/or network skillsets (if you purchased the Network Skill-Based Routing option). Configure call priority for primary and overflow skillsets.	

Phase 8: Configuration of Network Skill-Based Routing (optional)

Configuration of Network Skill-Based Routing

Task #1 Configure network skillsets on the Network Control Center

Task #2 Configure network skillsets in Symposium Express Call Center

Task #3 Assign agents to network skillsets

Task #4 Configure sites

Task #5 Configure call routing to network skillsets
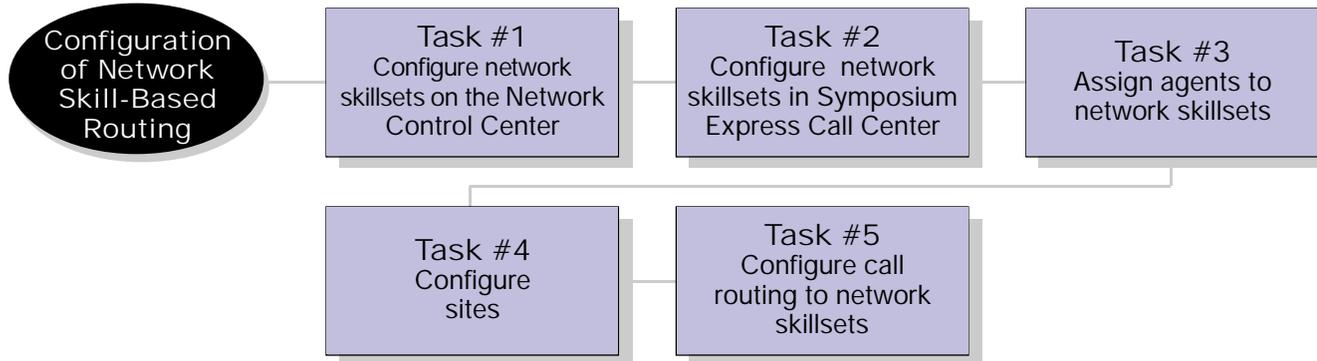
Task #	Task description	Where to find information
1.	Configure network skillsets on the Network Control Center	• Symposium Call Center Server Network Control Center Management Guide
2.	Configure network skillsets in Symposium Express Call Center	• Call Center Management Guide
3.	Assign agents to network skillsets	• Call Center Management Guide
4.	Configure sites	
5.	Configure call routing to network skillsets	

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Phase 9: Configuration of real-time displays (optional)

```
┌─────────────┐      ┌──────────────┐      ┌──────────────────┐
│Configuration│      │  Task #1     │      │   Task #2        │
│of real-time │──────│  Choose      │──────│ Set real-time    │
│displays     │      │statistics to │      │ display threshold│
│(optional)   │      │  view        │      │ levels and colors│
└─────────────┘      └──────────────┘      └──────────────────┘
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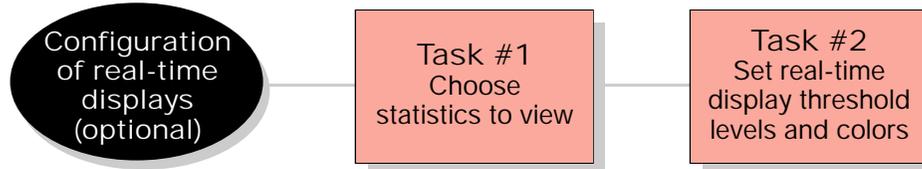
Task #	Task description	Tasks involved	Where to find information
1.	Choose statistics to view	Choose Monitoring Agent Status, Monitoring Skillset Performance, and Monitoring Call Center Summaries statistics	• Reports and Displays Guide • Online Help and tutorials
2.	Set real-time display threshold levels and colors		

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Phase 10: Creation of customized reports (optional)

Creation of customized reports (optional)

Task #1 Create reports

Task #2 Import user-created reports

Task #3 Define report properties

Task #4 Activate the report schedule

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)	• Reports and Displays Guide • Online Help and tutorials
2.	Import user-created reports	Import custom and expert reports created in Crystal Reports	
3.	Define report properties	Define the report schedule and other properties	
4.	Activate the report schedule	Activate scheduled reports	

Note: To create custom reports, you must have Crystal Reports or another SQL- and ODBC-compliant report writer.

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Phase 11: Running backups and restoring data

Running backups and restoring data — **Task #1** Decide which type of backup to use — **Task #2** Restore and recover data
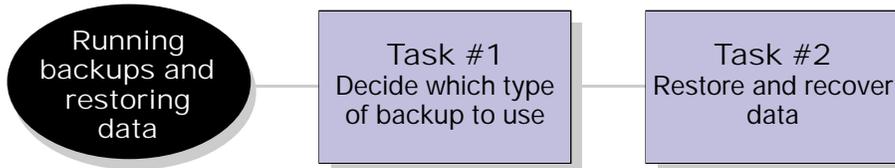
Task #	Task description	Tasks involved	Where to find information
1.	Decide which type of backup to use	Decide whether to do a full or partial database backup Perform the appropriate backup	• Call Center Management Guide
2.	Restore and recover data	Recover from a hardware failure Restore to another server Restore from a backup (if available)	• Planning, Installation, and Administration Guide (distributor only)

Nortel Networks
Symposium Express Call Center
End-To-End Task Flow

NØRTEL NETWORKS™

For CPU Position Only