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Upgrading from Call Center Reporting to Reporting for Call Center

Upgrade Document

Reporting for Call Center

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Change History

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1. Amended as per Nortel team review feedback.

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1. 2003 Server support note added.
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1. Nomenclature changes to support new product branding.
2. Updated all relevant text and screenshots to support product changes in RCC.

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1. Edited text.
2. Standardization made to figure labels, headers, formatted text and added cross-references.

Issue 03 (01) – 19-October-2005

1. Nomenclature changes to support product branding of Reporting for Call Center.
2. New screenshots and editing of text in line with Reporting for Call Center.

Issue 03 (02) – 24-October-2005

1. Updated figure numbers in the List of Figures.
2. Changed Release number and updated Document Number and Document Version.

How to use this guide 1

Introduction

This guide is designed to lead you through the process of upgrading from Nortel Networks Call Center Reporting 2.5/3.0/3.5 to Nortel Networks Reporting for Call Center.

How this guide is organized

The *Upgrading from Call Center Reporting to Reporting for Call Center* guide is organized as follows:

How to use this guide	This chapter provides a brief overview identifying the organization of this guide.
Introduction	This chapter gives a background to the upgrade process and what it involved. The chapter describes some differences between the previous architecture products and the updated architecture. The chapter also answers some questions you may have about the upgrade process.
Installation	This chapter describes how to install Nortel Networks Reporting for Call Center.
Configuration	This chapter describes how to configure Nortel Networks Reporting for Call Center including verification of a successful installation .
Verification	This chapter describes how to verify that Nortel Networks Reporting for Call Center is communicating correctly with the Call Center.
References	This chapter lists documents referenced in the body of this guide.
Index	Provides a cross-reference of topics in this document.

Introduction 2

Upgraded Product Architecture

Nortel Networks Reporting for Call Center has undergone several major changes from previous versions of Nortel Networks Call Center Reporting 2.5/3.0/3.5. The following sections list some main differences between the upgraded architecture and the previous versions.

For a full description of the upgraded features of Nortel Networks Reporting for Call Center, refer to the *Reporting for Call Center Setup and Operations Guide*.

Upgraded Browser-Based Interface

Nortel Networks Reporting for Call Center is a reporting tool for the Call Center. It has a browser-based interface, visually similar to the Call Pilot Manager. As with the Call Pilot interface, it is accessed from an Internet Explorer browser session.

Upgraded Web Host PC software

Nortel Networks Reporting for Call Center has a single software installation on one Personal Computer (PC). This PC is the Web Host PC, which functions similarly to the Master PC in the former Nortel Networks Call Center Reporting 2.5/3.0/3.5 streams.

The Web Host PC stores the historical statistical databases. It is connected to the Call Center to obtain the historical statistical information and Real Time screen information.

The wallboards are also driven from the Web Host PC.

Upgrade! No Multiple Client software to install

In the Nortel Networks Reporting for Call Center streams, the customer had to install ‘Multiple Client’ software onto other PCs to view the Real Time screens or Reports.

With Nortel Networks Reporting for Call Center, the users of those other PCs use Internet Explorer to browse back to the Web Host PC to access the Real Time screens and Reports.

No Client software is now required for the other PCs.

Upgrade! No Upload of Call Center Configuration

In the Nortel Networks Call Center Reporting 2.5/3.0/3.5 streams, the customer had to upload the Call Center configuration to view the Agent, Line, and Skillset names in the Reports and Real Time screens. If the Call Center configuration was modified, the Configuration Upload step had to be performed again.

Nortel Networks Reporting for Call Center automatically obtains the information it needs for the Real Time screens and Reports from the Call Center, and it does not need to store a copy of the Call Center configuration.

No Upload Configuration step is required in the configuration and maintenance of the Nortel Networks Reporting for Call Center software.

Can the old Master PC be used as the Web Host PC?

If the PC hardware and operating system meet the minimum specifications, then the answer is Yes. See below, Can the upgraded software co-reside with the old software?.

Do I have to remove the old Nortel Call Center Reporting 2.5, 3.0, or 3.5 software?

No, but you can if it is no longer needed. See the following section, Can the upgraded software co-reside with the old software?.

Can the upgraded software co-reside with the old software?

None of the Nortel Networks Call Center Reporting 2.5/3.0/3.5 software is required for the operation of the upgraded Nortel Networks Reporting for Call Center software.

However, the customer may choose to retain the Nortel Networks Call Center Reporting 2.5/3.0/3.5 software to allow them to review the historical reports that are stored on their old system.

Leaving the Nortel Networks Call Center Reporting 2.5/3.0/3.5 Master or Multiple Client software on the PC that will be used as the Web Host PC does not affect the operation of Nortel Networks Reporting for Call Center.

The two different applications can co-reside on the same PC with no interaction.

Installing Nortel Networks Reporting for Call Center on a PC on which Nortel Networks Call Center Reporting 2.5/3.0/3.5 is already installed does not affect the operations of either application.

Note: If the Nortel Networks Call Center Reporting 2.5/3.0/3.5 software is configured to power any IP wallboards that Nortel Networks Reporting for Call Center is going to power, remember to remove them from the Nortel Networks Call Center Reporting 2.5/3.0/3.5 configurations. Otherwise, both sets of software try to power the wallboards, which results in the wallboard display alternating between the two sets of data from the two different applications.

Note: The specification of the hardware used as the Master PC for the Nortel Networks Call Center Reporting 2.5/3.0/3.5 software might not be sufficient to support the Nortel Networks Reporting for Call Center software. See the following section, Minimum PC and Operating System Requirements.

Minimum PC and Operating System Requirements

Computer Platform Family
IBM™ Compatible PC
Microprocessor
Intel® Pentium™ III (or equivalent) minimum, Intel® Pentium™ IV (or equivalent) recommended
Microprocessor Speed
400 MHz minimum, 1.0 GHz recommended
Memory
64 MB minimum, 128 MB recommended
Networking Components
Network Interface Card
TCP/IP protocol
Other Requirements
SVGA display
Mouse (or other Windows® compatible Pointing Device)
Nortel Networks Reporting for Call Center has been verified with Microsoft Internet Information Services 4 and 5
Operating Systems
Microsoft Windows NT 4 Service Pack 6a
Microsoft Windows 2000 Service SP2
Microsoft Windows XP Professional
Microsoft Windows 2003 Server Standard Edition
Web Server
Microsoft Internet Information Services 4 or later
Hard Disk Space Required
For installation of application on Web Server: 20 MB
Storage space required for Historical Data: 256 bytes per call (approximately).

Operating System Compatibility

Nortel Networks Reporting for Call Center has been verified for correct operation on the following Operating Systems:

Operating System	Version
Windows NT	4.00.1381
Windows 2000	5.00.2195
Windows XP Professional (including SP 2)	Version 2002
Windows 2003 Server	Standard Edition

Installation 3

Introduction

This chapter describes the installation prerequisites and how to install the Nortel Networks Reporting for Call Center software on the Windows Personal Computer (PC) that will be used as the Web Host PC. The Web Host PC is the PC that connects to the Nortel Networks Call Center. The Web Host PC also stores the Call Center statistical database and the Nortel Networks Reporting for Call Center user interface, which is configured as a web site.

Other network users can use Internet Explorer to browse to the Nortel Networks Reporting for Call Center web site on the Web Host PC to access the software features and obtain Real Time displays and Reports.

Installation prerequisites

Before you install Nortel Networks Reporting for Call Center software, you must:

- Be familiar with the Call Center and the Windows ™ operating system that your Web Host PC uses.
- Ensure that the Call Center is installed and configured.
- Ensure that the Call Center platform is connected to, and is operational on, the network to which the Nortel Networks Reporting for Call Center Web Host PC is connected.
- Ensure that Microsoft Internet Information Services is installed and operational on the Web Host PC.

!	Ensure that your Web Host PC Internet Information Services installation is as secure as possible. Generally, this involves loading security patches and/or service packs for Internet Information Services and for the operating system of the Web Host PC. These patches and service packs are available free of charge through Microsoft. Contact your network Administrator for further advice.

Now you are ready to install the Nortel Networks Reporting for Call Center software from the Call Center platform.

!	You **must** have Administrator's rights for the installation to be successful. If you do not have Administrator's rights for the PC on which you wish to install Nortel Networks Reporting for Call Center, the installation stops and you are requested to log out and log back in with Administrator's rights.

Installing Nortel Networks Reporting for Call Center software

By default, Nortel Networks Reporting for Call Center software creates a folder called **\Program Files\Nortel\Nortel Networks Reporting for Call Center** on the installation drive of the Web Host PC. This folder contains the application files Nortel Networks Reporting for Call Center uses. It also contains the Nortel Networks Reporting for Call Center configuration and statistical database.

Note: Before Nortel Networks Reporting for Call Center will operate correctly, you must enable the Call Center Reporting Software Keycode. For Software Keycode information, refer to the *Software Keycode Installation Guide*.

TCP/IP Protocol

The Call Center platform and Nortel Networks Reporting for Call Center use the industry standard TCP/IP protocol to link the Call Center and the Nortel Networks Reporting for Call Center Web Host PC. Therefore, the Windows Network component is required for the Nortel Networks Reporting for Call Center Web Host PC.

The Nortel Networks Reporting for Call Center installation process does not install the Windows Network component. For instructions on installing the Windows Networking component, refer to your network or Windows documentation.

Checking whether the Windows Networking Component is Installed

To verify that the Windows Network component is installed on the PC that will operate as a Web Host PC, perform the following steps:

Note: If your company has a network administrator, check with your administrator before changing any network configuration parameters.

1. Start the Windows system on the PC on which you will install the Nortel Networks Reporting for Call Center application.

2. On the Windows taskbar, click **Start** > **Settings,** and then click **Control Panel**. The Control Panel window appears.

   If you are using the Windows 2000 operating system, double-click **Networking and Dial-up Connections**. The Networking and Dial-up Connections window appears.

   If you are using the Windows XP operating system, click **Start** > **Connect to,** and then click **Show All Connections**. The Networking Connections window appears.

3. Double-click the **Network** icon. The Network window appears with the **Configuration** tab displayed.

If you are using the Windows 2000 or Windows XP operating system, right-click the **Local Area Connection** icon and then click **Properties**.

4. Check that TCP/IP appears on the list of installed network components. If TCP/IP is not on the list, click **Add** to install this protocol using the Windows installation instructions, or refer to your network administrator.

Installing Nortel Networks Reporting for Call Center

Follow the steps in this section to install Nortel Networks Reporting for Call Center.

1. Exit any Windows programs that are open.

2. Start your Internet Browser (such as Internet Explorer or Netscape), and use it to connect the Business Communications Manager, or CallPilot. In the browser **Address Bar**, enter the IP Address of the Business Communications Manager, or CallPilot, in the following format: https://10.10.10.1/. Remember to substitute the IP Address of *your* Business Communications Manager, or CallPilot, for the 10.10.10.1 shown in the format example.

   The Nortel Unified Manager page appears in the browser.

3. Click the **Install Clients** link.
   The Install Clients page appears in the browser.

4. Click **Nortel Networks Reporting for Call Center**. Information about the Nortel Networks Reporting for Call Center application appears in the browser window. (You may need to scroll down through the page to see the button you need to install the application.)

5. Click **Nortel Networks Reporting for Call Center**.

   A dialog box appears from which you can select to either **Run this program from its current location** or **Save this program to disk**. The default option is **Save this program to disk.**

6. Click **OK**.

7. After the client is downloaded to your PC, go to the location where you downloaded the file and run it by double-clicking it.

   The Extracting Files dialog box appears. See Figure 1: InstallShield Initialization Dialog Box. Wait while the Wizard extracts the files needed to install Reporting for Call Center on your computer. To cancel the extraction process, click **Cancel**.

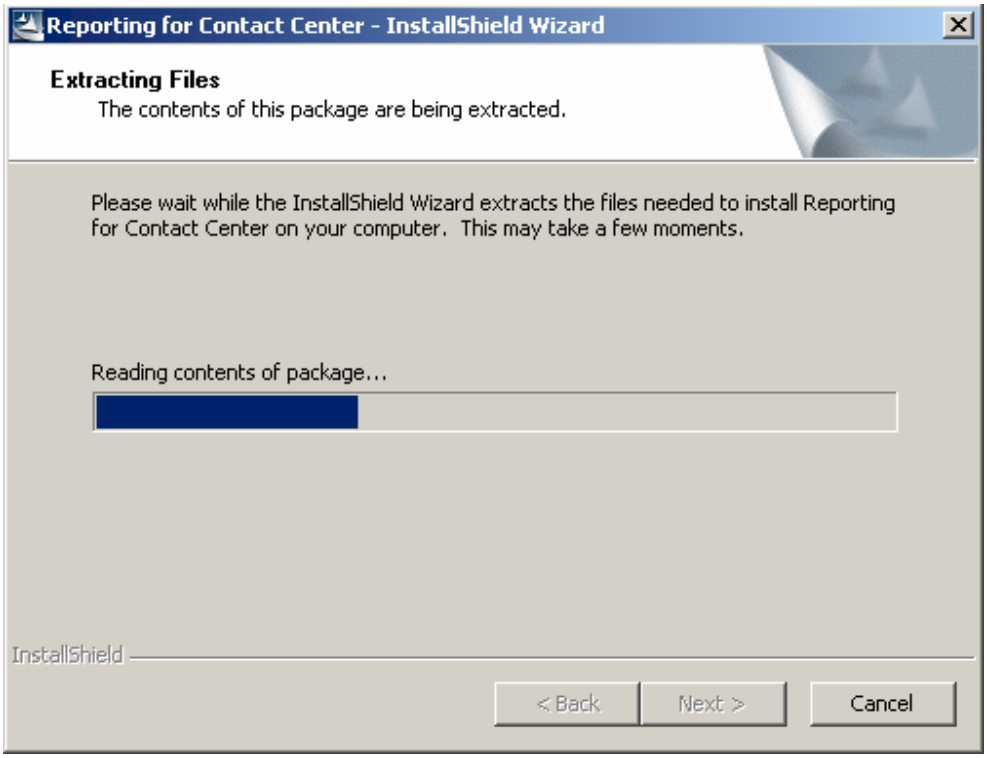

Figure 1: InstallShield Initialization Dialog Box

8. When the installation files are prepared, the **Language Selection** dialog box appears. See Figure 2: Language Selection Dialog Box. This dialog box allows you to select the default language for your installation of Nortel Networks Reporting for Call Center.

Figure 2: Language Selection Dialog Box

Note: The Users of Nortel Networks Reporting for Call Center are each allocated a language so various Users can use different languages . This dialog box allows you to define the default language for the log in page and for the default Administrator.

Select your language from the list, and then click **OK**. To stop the installation, click **Cancel**.

9. The Setup prepares the InstallShield Wizard, which is required to install the Nortel Networks Reporting for Call Center files on the Web Host PC. See Figure 3: InstallShield Windows Installer Configuration Dialog Box. Wait for the preparation process to complete. To cancel the preparation process, click **Cancel**.

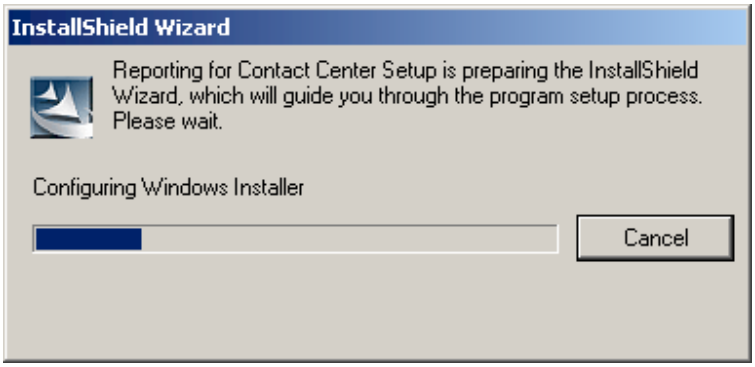

Figure 3: InstallShield Windows Installer Configuration Dialog Box

10. The **Welcome** dialog box appears. See Figure 4: InstallShield Wizard Start Dialog Box. To cancel the installation procedure, click **Cancel**. To proceed, click **Next**.

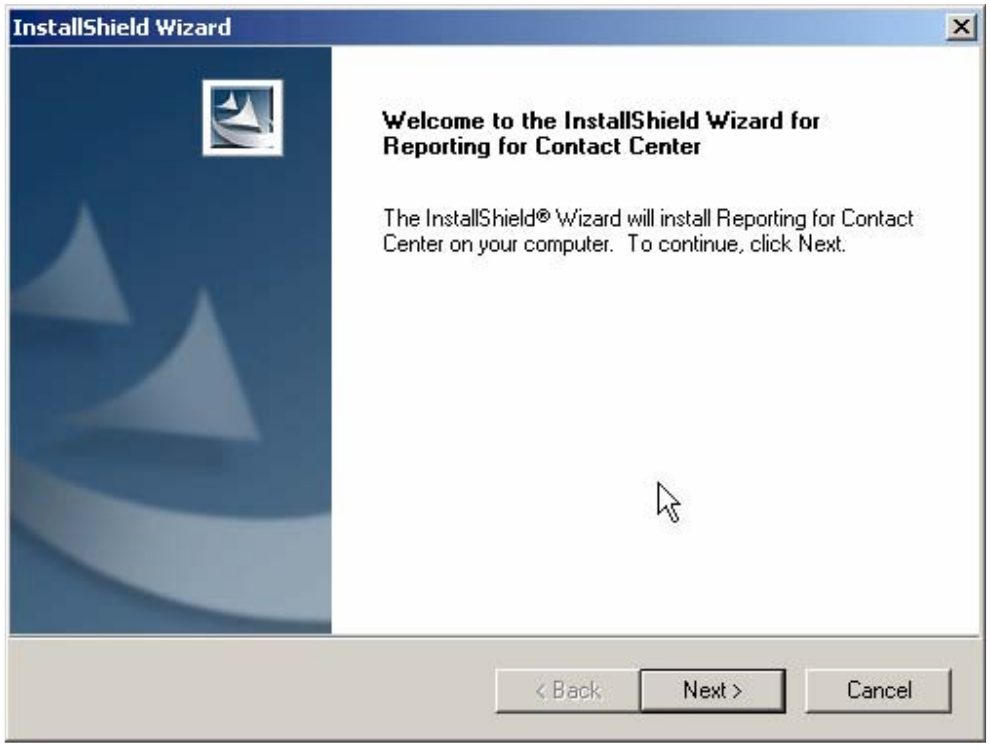

Figure 4: InstallShield Wizard Start Dialog Box

11. The **License Agreement** dialog box appears. See Figure 5: License Agreement Dialog Box. To proceed with the installation, click **Yes**. To cancel the installation, click **No**. To return to the **Welcome** dialog box, click **Back**.

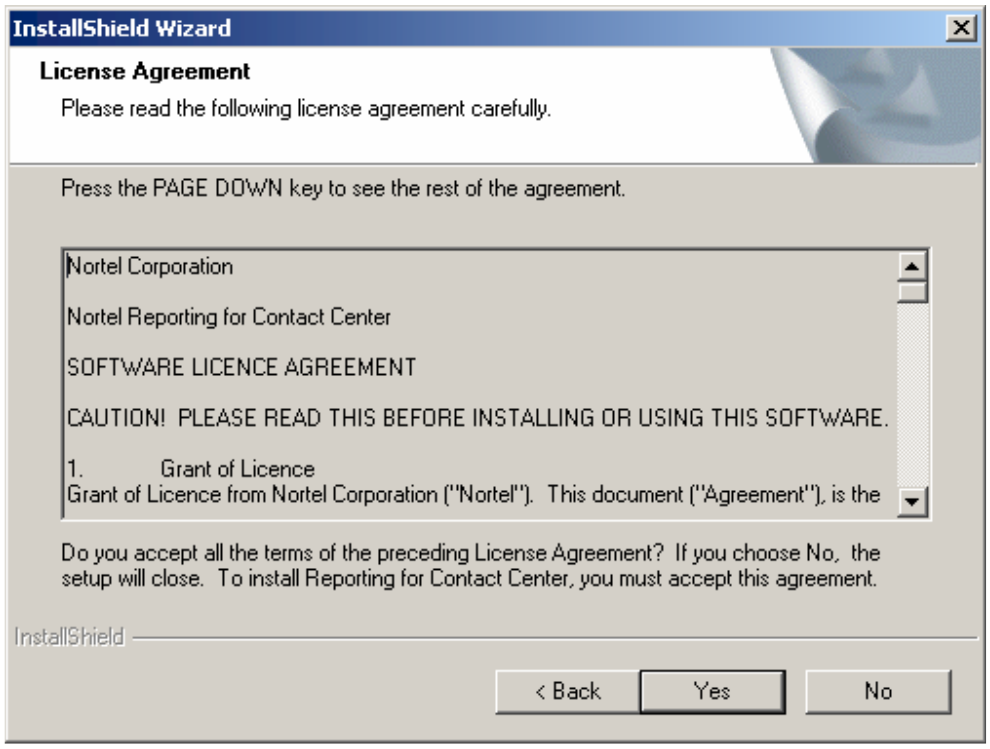

Figure 5: License Agreement Dialog Box

12. If you clicked **Yes** in the License Agreement dialog box, the **Customer Information** dialog appears. See Figure 6: Customer Information Dialog Box. Enter your user name in the **User Name** field. Enter the company name in the **Company Name** field. Click **Next**.

Note: The **Next** button is dimmed until you enter information in both required fields.

To cancel the installation, click the **Cancel** button. To return to the **License Agreement** dialog box, click **Back**.

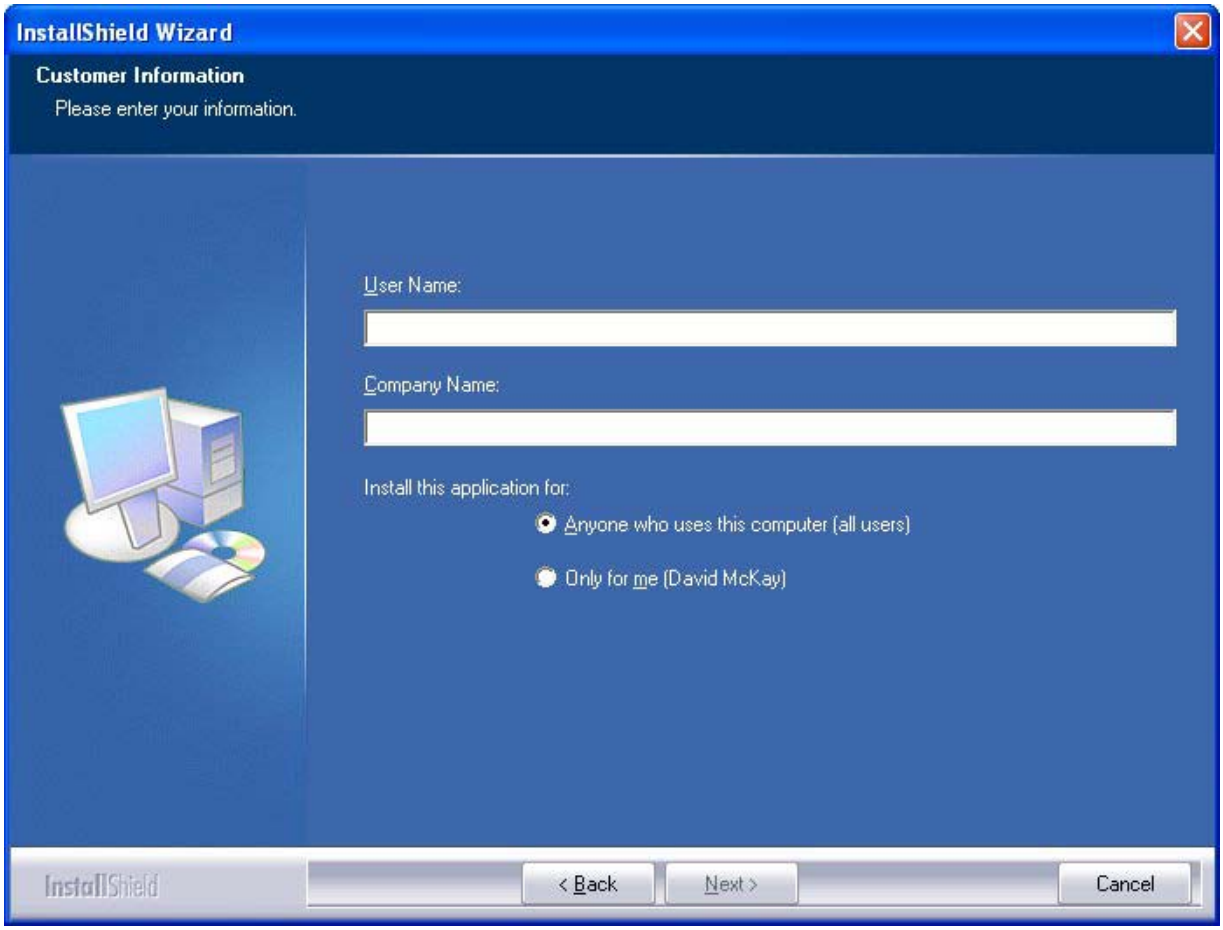

Figure 6: Customer Information Dialog Box

.

13. If you clicked the **Next** button in the Customer Information dialog box, the Choose Destination Location dialog box appears. See Figure 7: Choose Destination Location. If you do not wish to install Nortel Networks Reporting for Call Center on the default drive (C:), click **Browse** and choose a new destination. Nortel recommends that you use the default location.

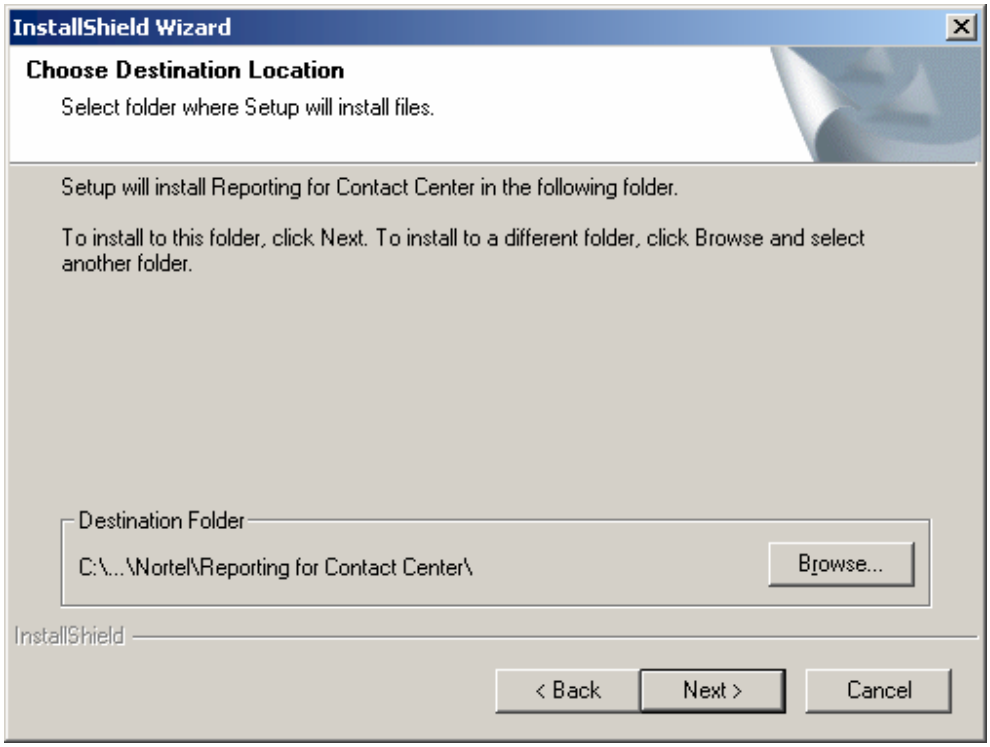

Figure 7: Choose Destination Location

To proceed with the installation, click **Next**. To cancel the installation, click **Cancel**. To return to the Customer Information dialog box, click **Back**.

14. If you clicked **Next** in the Choose Destination Location dialog box, the **Setup Status** dialog box appears. See Figure 8: Setup Status Dialog Box. To cancel the installation, click **Cancel**. To proceed with the installation, wait for the installation to complete.

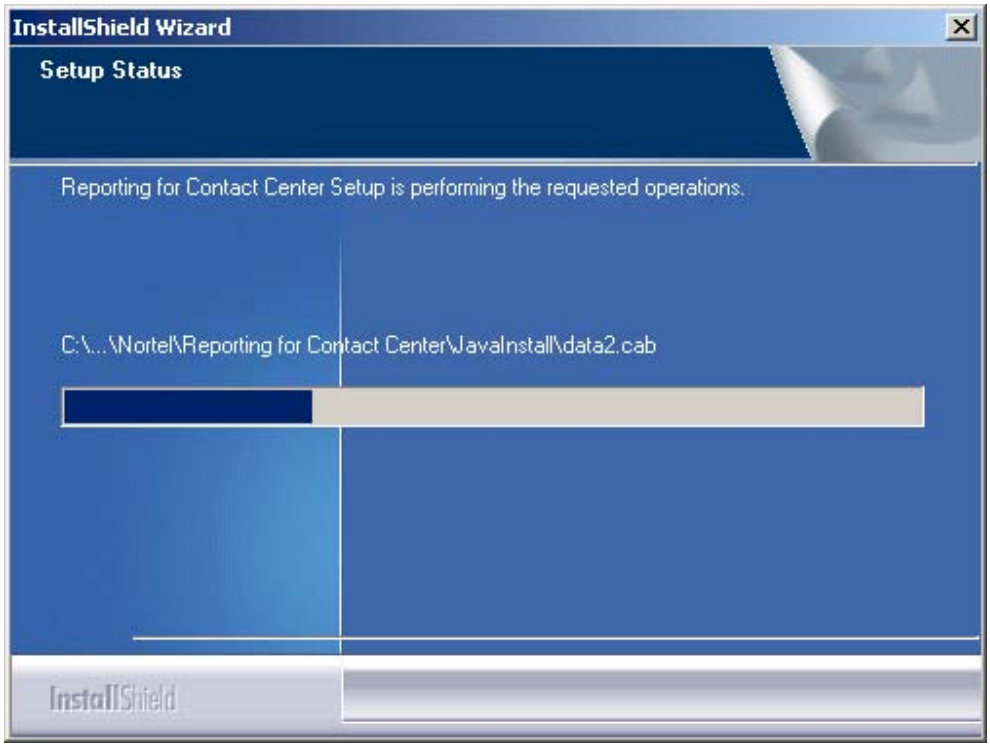

Figure 8: Setup Status Dialog Box

The message shown in Figure 9 appears.

Figure 9: Database Installation Dialog Box

15. This message informs you that the installation has proceeded to MySQL database installation. (The MySQL database is not installed into the same folders as Nortel Networks Reporting for Call Center; it is installed into \mysql on the target hard drive.) Wait for the installation to complete

    The message shown in Figure 10: Java Installation Dialog Box appears.

Figure 10: Java Installation Dialog Box

16. This message informs you that the installation has proceeded to Java Runtime installation. (The Java Runtime is not installed into the same folders as Nortel Networks Reporting for Call Center; it is installed into \Program Files\Java on the target hard drive.) Wait for the installation to complete.

    The Installation Complete dialog box appears. See Figure 11: Installation Complete Dialog Box.

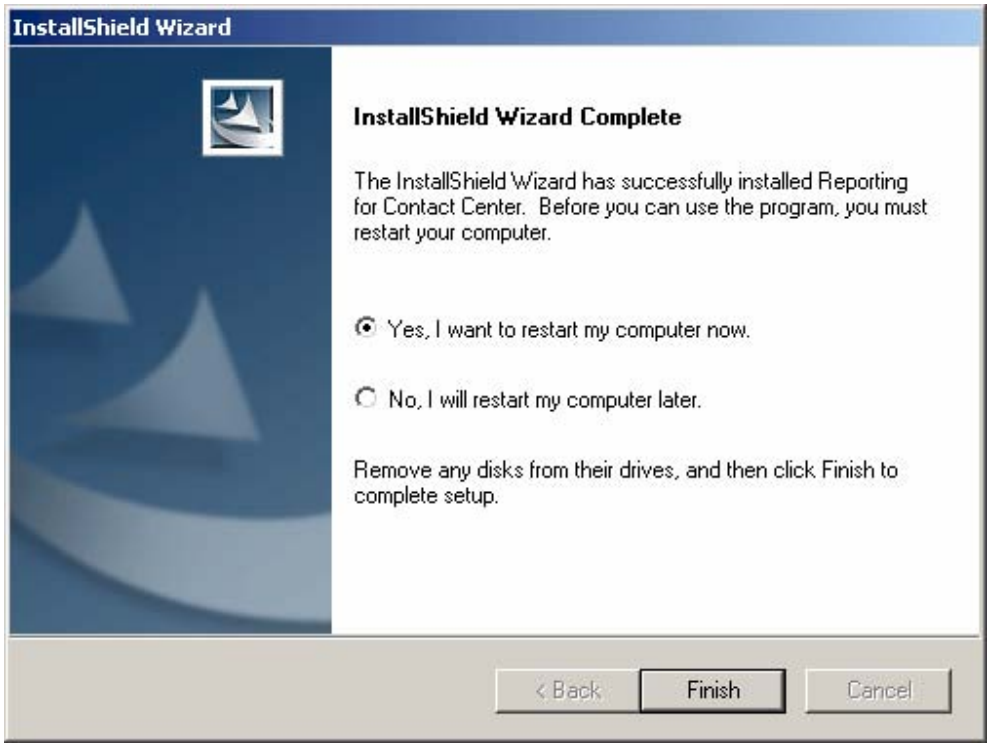

Figure 11: Installation Complete Dialog Box

17. Before Nortel Networks Reporting for Call Center can operate correctly, you must restart your Web Host PC.

    To have the installation restart your PC, click **Yes, I want to restart my computer now**, and then click **Finish**.

    To complete the installation without restarting your PC, click **No, I will restart my computer later**, then click **Finish**.

When your PC has restarted, you can start using Nortel Networks Reporting for Call Center application.

Configuration 4

Quick Steps to Configure Nortel Networks Reporting for Call Center

Before You Begin

Ensure that the Call Center is configured and operational, and that you have enabled the Reporting for Call Center Reporting Software Keycode. For Software Keycode information, refer to the *Software Keycode Installation Guide*.

Configuring Nortel Networks Reporting for Call Center

Follow this procedure to configure Nortel Networks Reporting for Call Center.

1. Using Internet Explorer, go to the URL of the Nortel Networks Reporting for Call Center Web pages login page.

   The URL is http://*NameOfWebHostPC*/RCC/
   Replace *NameOfWebHostPC* with the network name or IP Address of the Web Host PC.

   Note: If you are currently using the browser on the Web Host PC, you can replace *NameOfWebHostPC* with localhost.

   When you reach the correct location, the Login page appears. See Figure 12: Login Page.

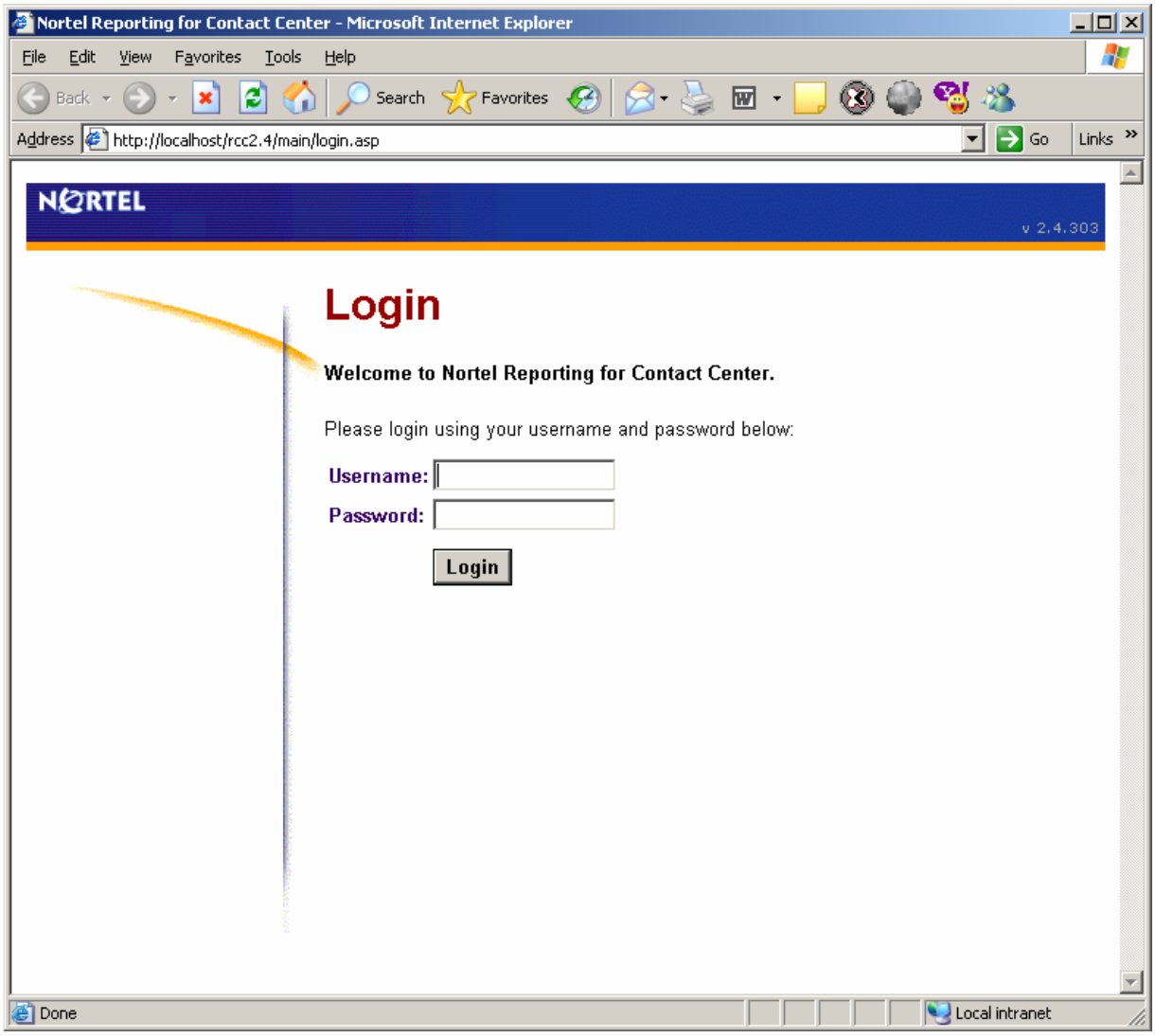

Figure 12: Login Page

2. Enter the username **admin,** the password **0000,** and click **Login**. The Change Password page appears. See Figure 13: Change Password Page.

Note: A System Administrator is already set up for you with a default password. You must change this password the first time you log in.

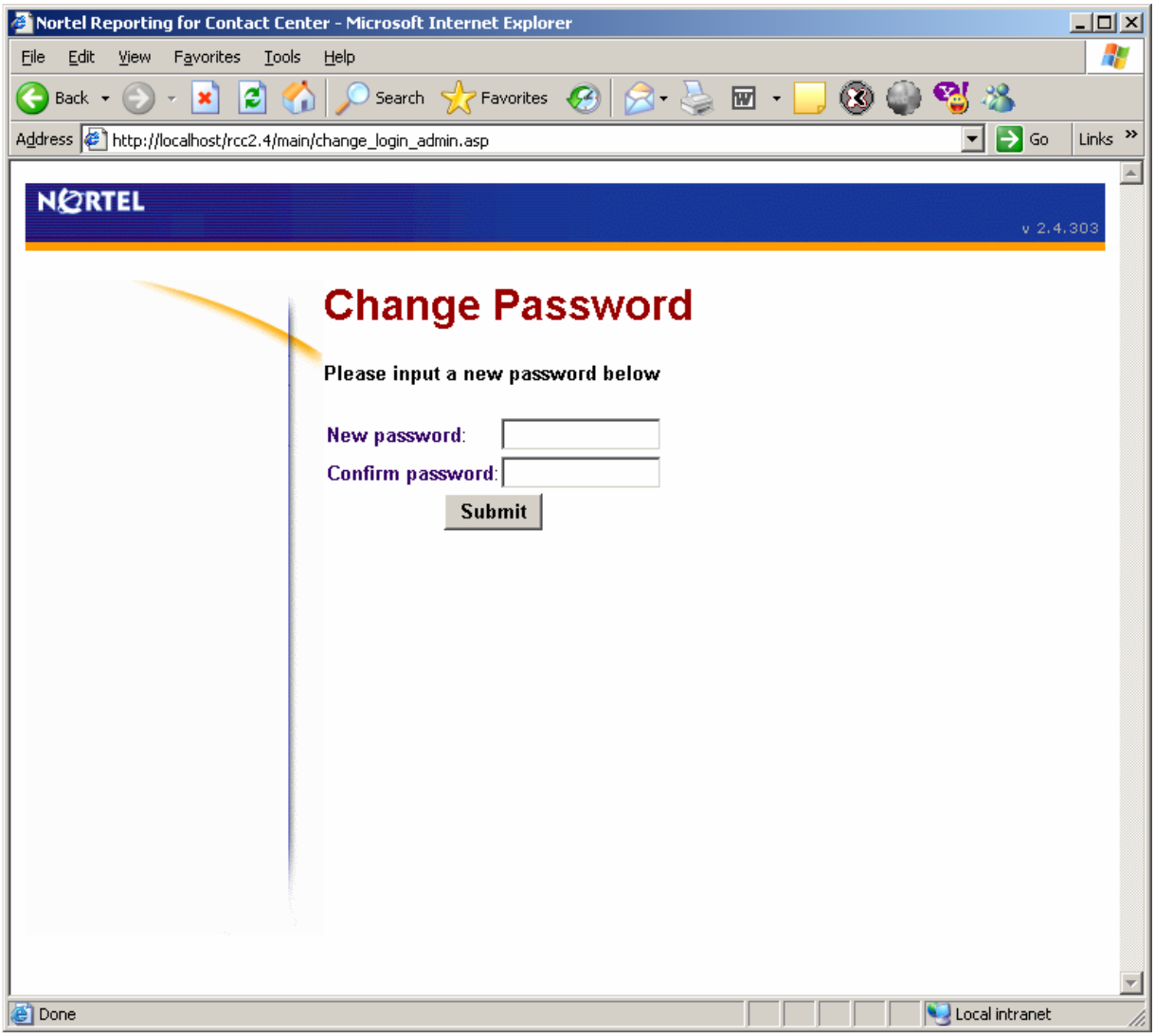

Figure 13: Change Password Page

3. Ask the Customer what they would like the new password to be.

   The password can be from 1 to 4 digits and can be anything other than 0000. Enter the new password in the **New Password** field, and then re-enter the same password in the **Confirm password** field.

   If there are any differences between the two entries, you are informed that the password and confirmation do not match, and you must re-enter the password in both fields.

   When you have successfully entered the new password in both fields, the Administration Menu page appears. See Figure 14: Administration Menu Page.

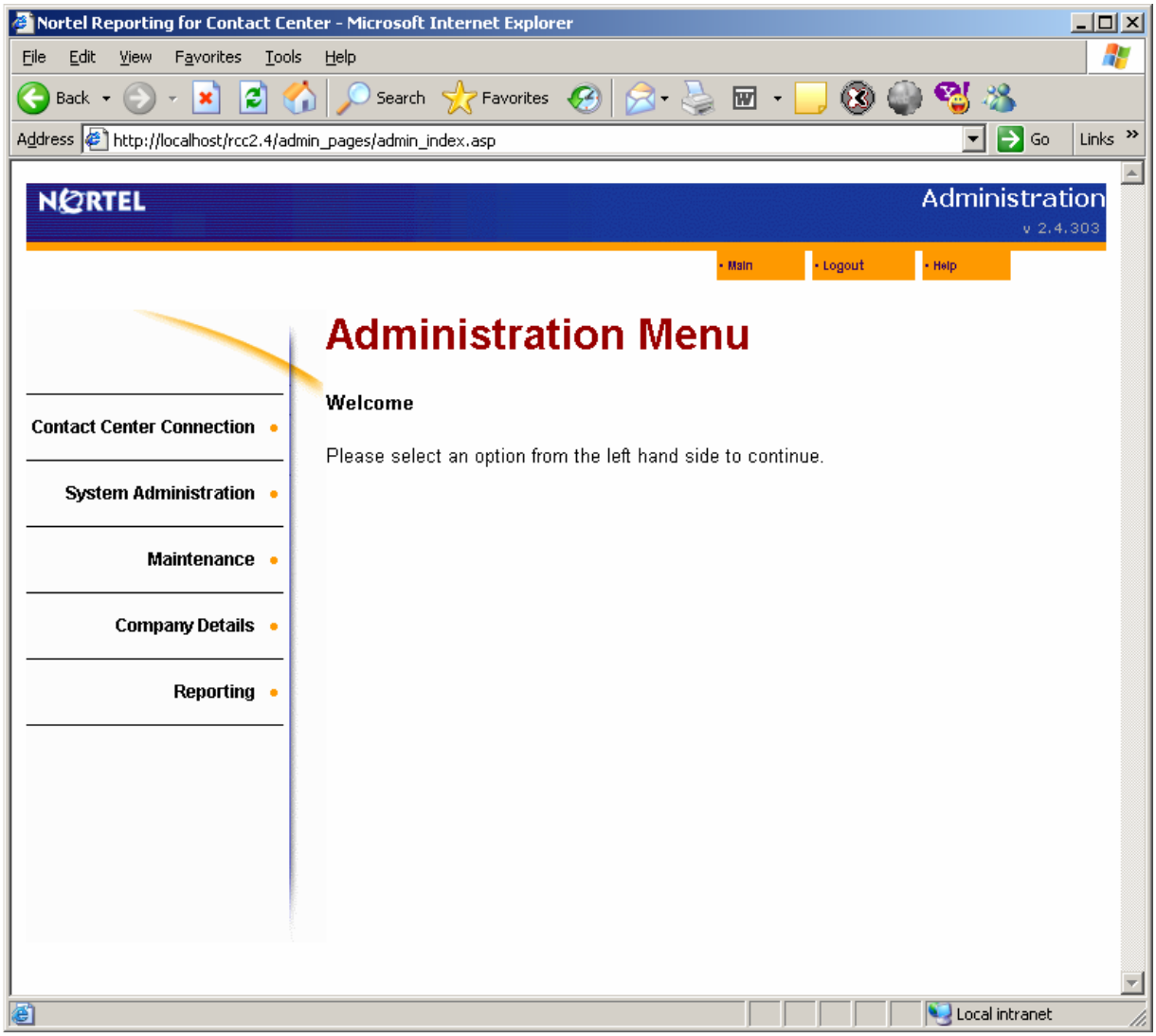

Figure 14: Administration Menu Page

The options that are available to an Administrator are listed in the navigation pane on the left side of the page

4. The **Call Center Connection** option allows you to specify the network identifier (IP Address or Network Name) of the Call Center platform.

   Click **Call Center Connection**. The Call Center Connection web page appears. See Figure 15: Call Center Connection Page.

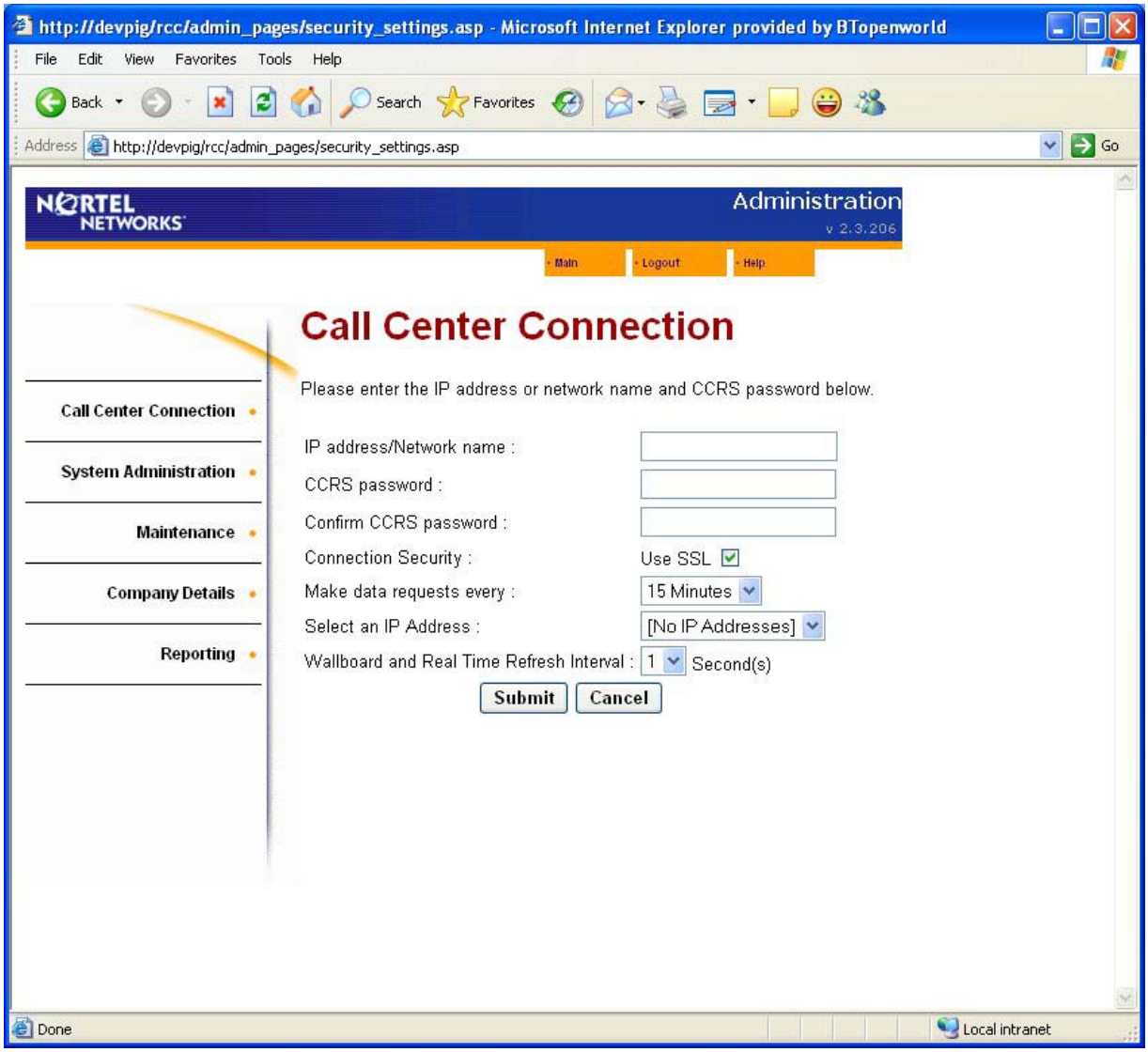

Figure 15: Call Center Connection Page

5. In the **IP address/Network name** field, enter the IP Address or the Network Name of the Business Communications Manager, or CallPilot. If you do not know what information to enter here, consult the Local Area Network Administrator for the site.

6. When Nortel Networks Reporting for Call Center retrieves Real Time or Historical Report data from the Call Center, the data request includes a password. This allows the Call Center to verify that the application requesting the data is authorized to receive it.

   This password is set in the Call Center using CallPilot Manager.

Note: The default CCRS password is CCRS, but this might have been changed within CallPilot Manager.

7. In the **CCRS Password** field, enter CCRS and then re-enter it in the **Confirm CCRS Password** field.

8. The Connection Security option allows you to specify whether you are connecting to the Call Center using SSL (also known as HTTPS). This is the default option. If it is changed on the Call Center platform to Non SSL or standard HTTP, you must also change this setting.

Note: This is an advanced setting that is not usually changed from the default.

Leave the **Use SSL** check box selected.

9. The **Make data requests every** list allows you to specify how frequently the Web Host PC obtains reporting data from the Call Center.

Set **Make data requests every** to **15 minutes**.

10. Use the **Select an IP Address** list to configure how Reporting for Call Center broadcasts data to your wallboards. If the Web Host PC has multiple Network Interface Cards (NICs), select which network card is connected to the network [with your wallboards attached to. Consult your Network administrator to determine which IP address to use. If the Web Host PC has only one NIC, only one IP address appears in the list. If this is the case, select the only option.

11. Use the **Wallboard and Realtime Refresh Interval** setting to specify the rate at which your data refreshes on these devices. The default is **1 second**, and the default is the recommended setting. Note: All data within Reporting for Call Center is calculated to a 1-second resolution. This setting refers only to how quickly your live data devices refresh.

12. Click **Submit**.

A download status window that displays the current status of the data exchange between the Call Center and the Reporting for Call Center client appears. See Figure 16: Download Status Window. Wait until the update completes before attempting to view any Reports or Real Time screens.

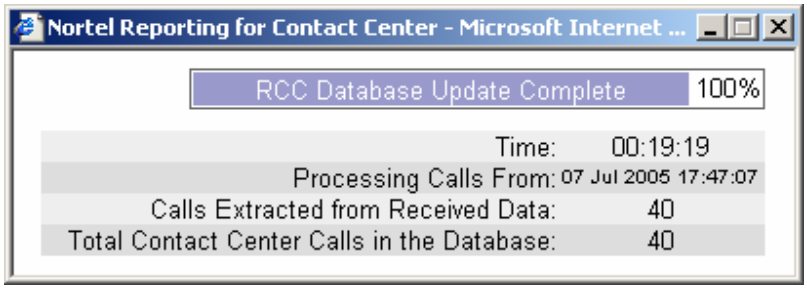

Figure 16: Download Status Window

Verification 5

Accessing the Real Time Screens

Once Nortel Networks Reporting for Call Center has been installed and configured this section describes how to verify that Nortel Networks Reporting for Call Center is communicating correctly with the Call Center.

Reporting Option

Follow this procedure to use the **Reporting** option.

1. On the Administration Menu page shown in Figure 17: Administration Menu Page, click **Reporting**.

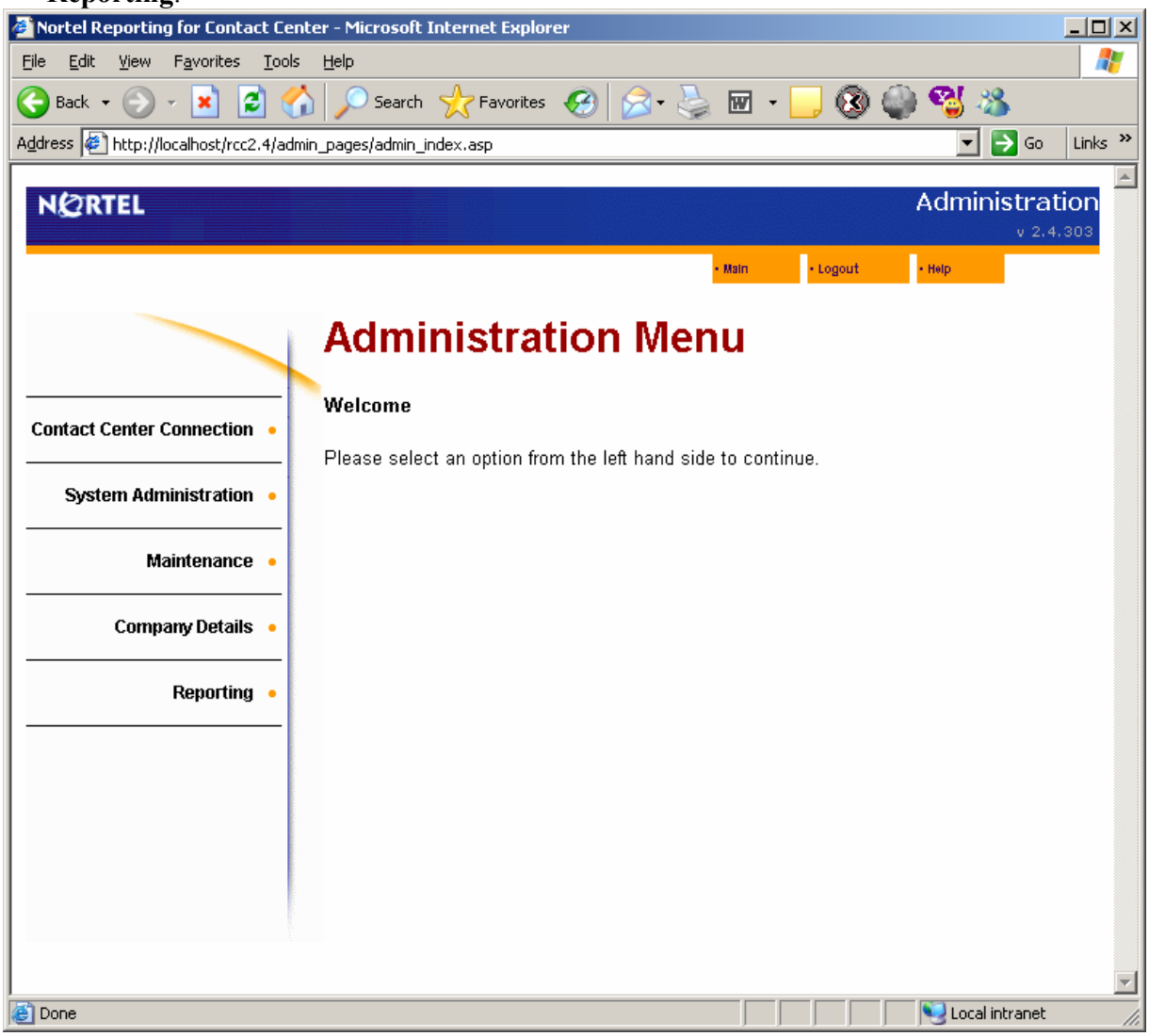

Figure 17: Administration Menu Page

The Main Menu page normally seen by regular (non-Administrative) Users when they log in to Nortel Networks Reporting for Call Center appears. See Figure 18: User Main Menu.

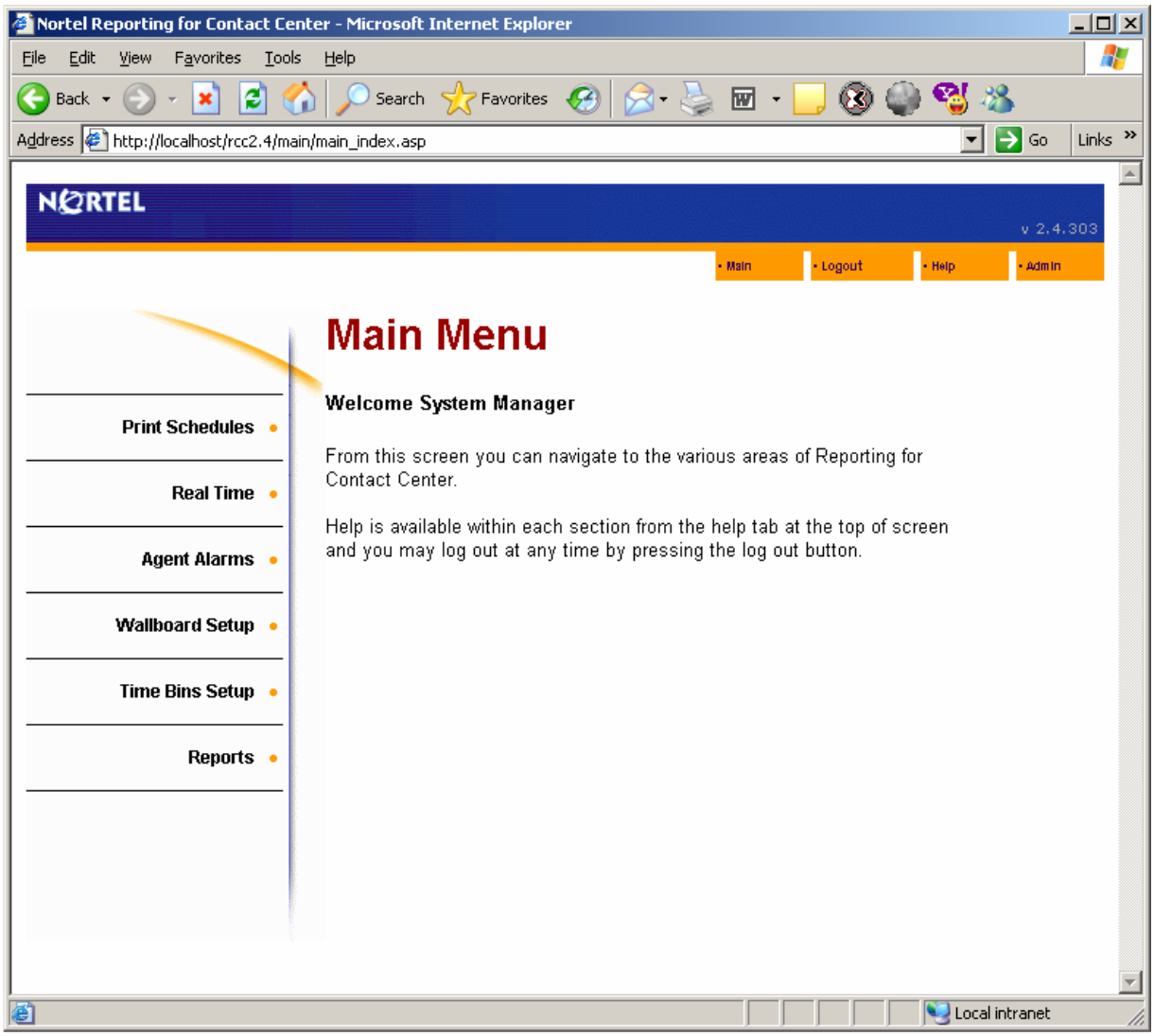

Figure 18: User Main Menu

2. Click **Real Time** option. The Real Time Menu page appears. See Figure 19: Real Time Menu Page.

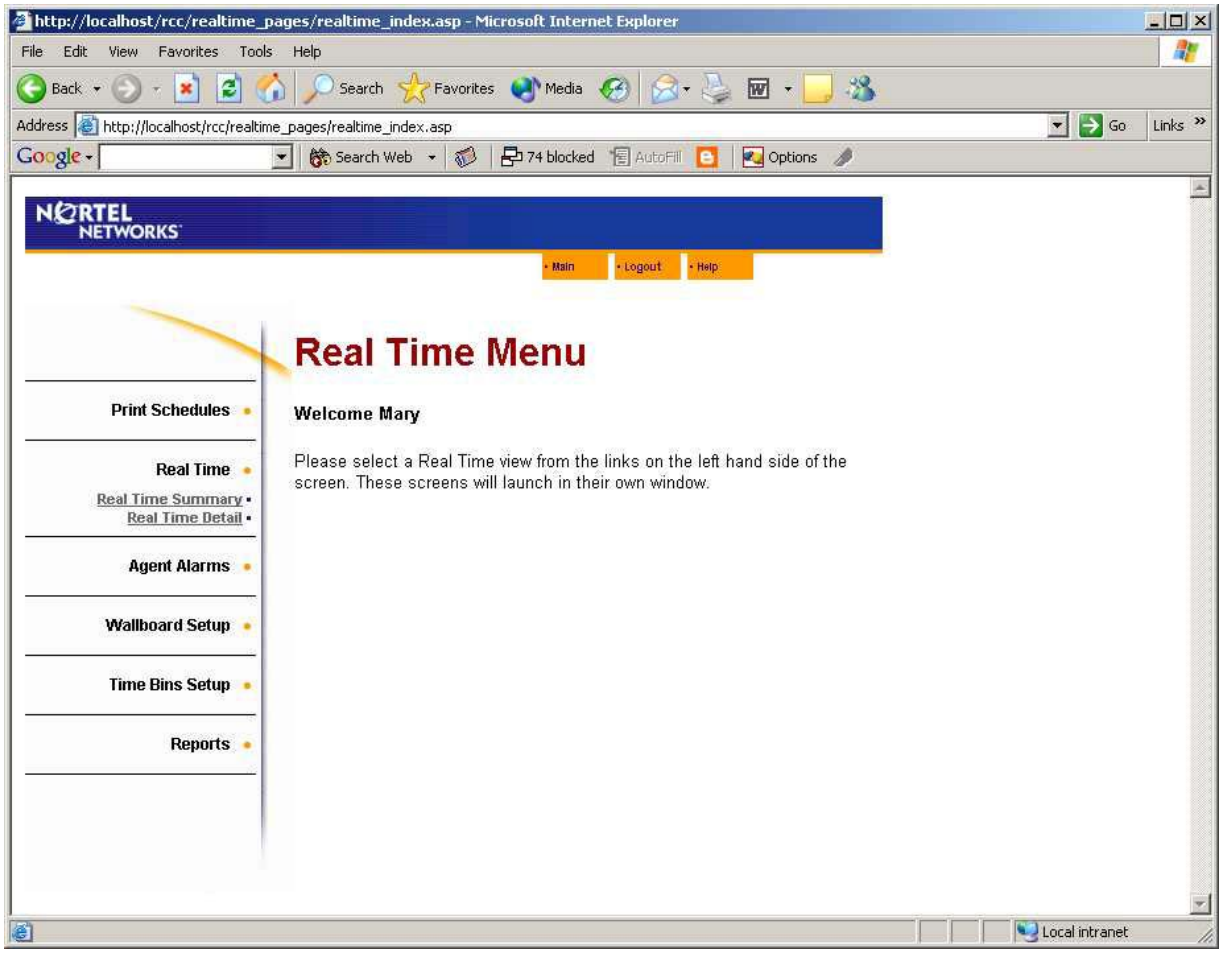

Figure 19: Real Time Menu Page

3. Select the **Real Time Summary** menu option.

   The Real Time Summary Skillset selection page appears. See Figure 20: Real Time Summary Skillset Selection Page.

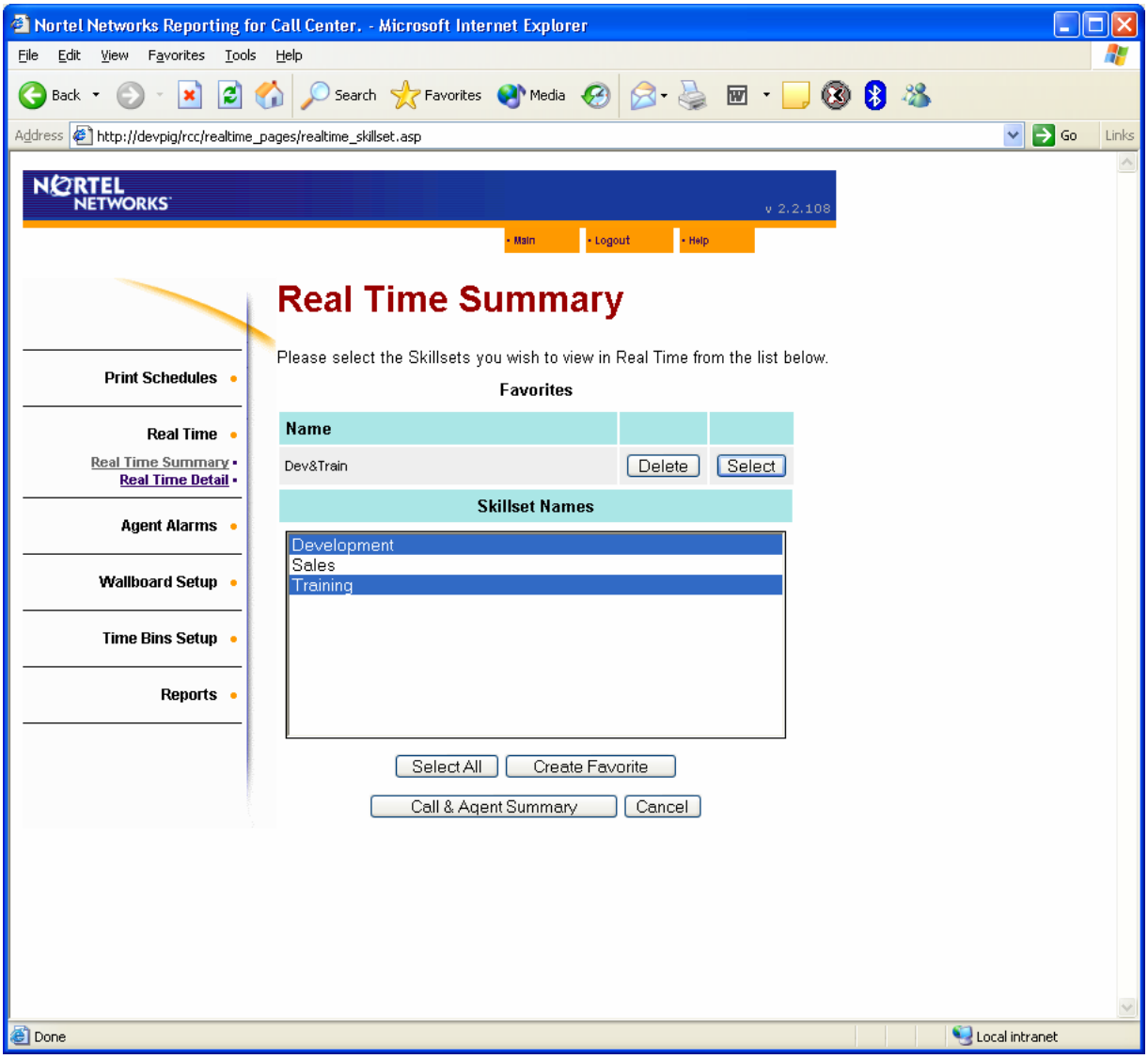

Figure 20: Real Time Summary Skillset Selection Page

4. Select Skillsets from the **Skillset Names** list, the Favorites list, or click **Select All**, and then click **Call & Agent Summary**.

   The **Real Time Summary** page appears. See Figure 21: Real Time Summary Page.

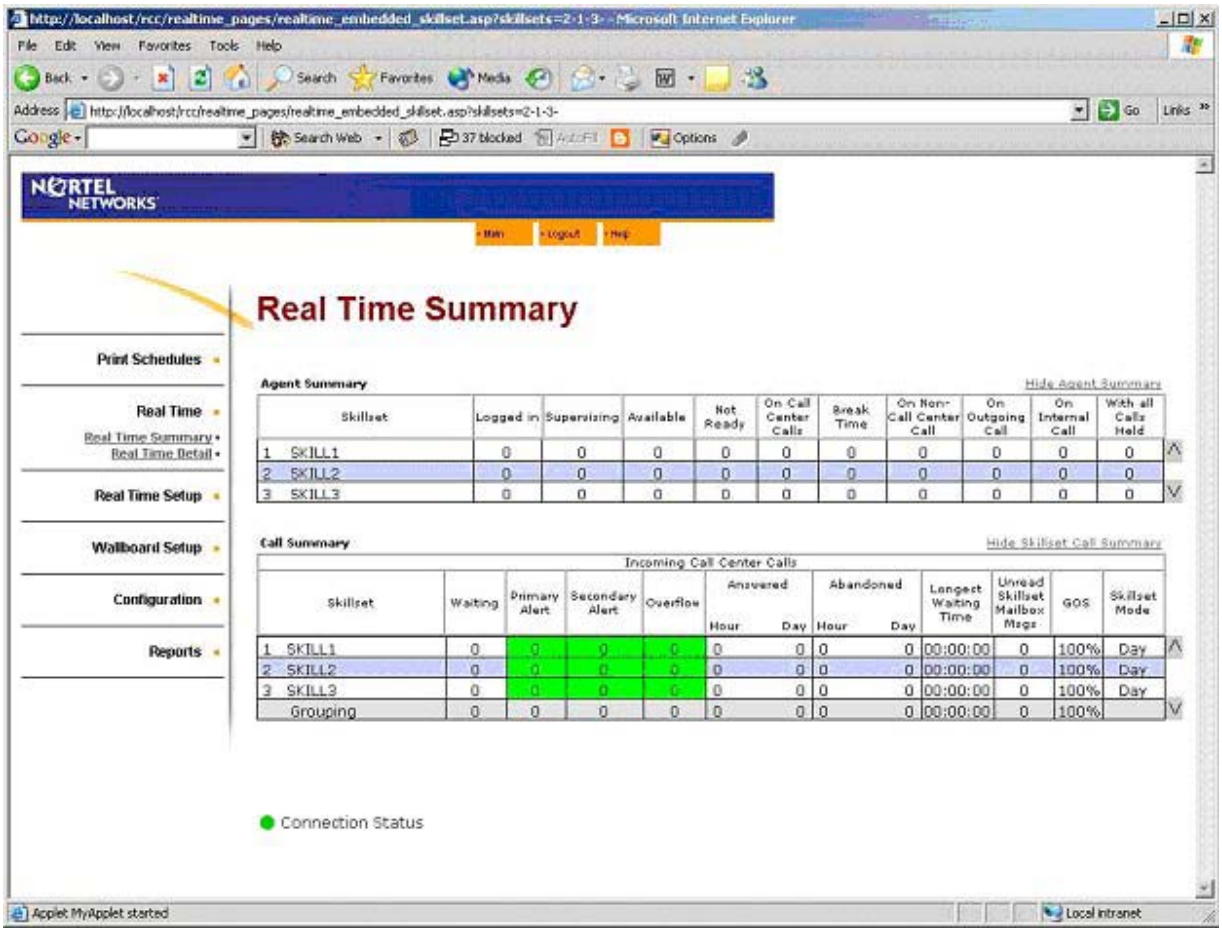

Figure 21: Real Time Summary Page

Note: The list of Skillset names on your Real Time screens reflects **your** Call Center configuration. The names displayed on your system will be different, and you may see more or fewer names than in the example. The numerical figures will be different, and some of the green cells may be appear as yellow or red because these figures reflect the real state of your actual Call Center.

5. Observe the green indicator beside the **Connection Status** text at the bottom left of the page.

   If this indicator is red, then the Nortel Networks Reporting for Call Center and the Call Center are not communicating.

   If you do not see a green indicator, follow these steps:

   a) Ensure you correctly entered the IP Address or Network Name of the Call Center Business Communications Manager (or CallPilot) in the IP Address/Network Name field on the Call Center Connection page, as described on page 23.

b) Ensure you correctly entered the CCRS password in the CCRS Password and Confirm CCRS Password fields of the Call Center Connection page, as described on page 23.

c) Ensure you configured the Call Center through CallPilot Manager to have the same CCRS password as the password you are enter in the Call Center Connection page.

d) Ensure you selected the correct Connection Security on the Call Center Connection page, as detailed on page 23.

5. When you verified these items, log out of Nortel Networks Reporting for Call Center, log in again, and then repeat the steps in this chapter.

Note: Remember to log in with the new password you entered in the Change Password page shown in Figure 13: Change Password Page, not the default of 0000.

References

1 McKay, David *Reporting For Call Center Setup and Operations Guide*, Issue 02-13.

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