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Introduction

CBC Overview

The IP Office Compact Business Center (CBC) is designed to provide a summary of both current and historical activity on an IP Office telephone system. It provides both overall system performance information and information on up to 3 selected hunt groups.

Data is written every minute to a CSV file for each day. The CBC is able to access those files going back for 31 days.

The CBC obtains its call data from the IP Office via another application, the IP Office Delta Server. This can be on the same PC or on a separate PC.

Each IP Office supports only a single Delta Server. However, the Delta Server is able to share that IP Office's call data with up to 80 simultaneous client applications.

CBC is a licensed application, and requires a license in the IP Office configuration for each copy of CBC being run.

The schematic below shows the IP Office Delta Server and CBC on separate PC's.

This schematic shows the IP Office Delta Server and CBC on the same PC.
The CBC Screen

The CBC screen can display up to 4 charts. Each of these can plot up to 4 data variables for an agent group or the whole system, with each data variable being either real-time for the current day or historical for a selected day in the last 31 days.

The base of the screen shows a number of key performance indicators for the whole IP Office system. For more details of these see Key Performance Indicators.

In addition the CBC can display a Trunk Utilization Graph, see Trunk Utilization Graph.
Installation

CBC Installation Requirements

- **IP Office Administrator Applications CD**
  Contains the CBC software and, if necessary, the Delta Server and Feature Key Server software.

- **IP Office Feature Key**
  CBC is a licensed application. It requires the IP Office to have a Feature key installed.

- **CBC License**
  One license is required for each copy of CBC that will be run. The licenses are unique to the serial number of the Feature Key being used.

PC Requirements

The Delta Server and CBC can be installed on either the same PC or on separate PC's. In both cases the following is the minimum recommended PC specification.

**Operating System**

- Windows 2000 Server or Professional with SP2
- Windows XP Professional.

**Minimum Recommended PC Specification**

This specification may need to be changed to reflect the operating system being used.

- Pentium III 500MHz or higher.
- 10GB free hard disk space.
- Minimum 256MB RAM.

**Network Requirements**

- The Delta Server PC should be on the same network segment as the IP Office system, ie. not connected to the IP Office via any intermediate router or remote connection.
- The PC should have an IP address on the same subnet as the IP Office system. A fixed IP address is recommended.
- Connection via LAN2 is not supported. The Delta Server should be connected via LAN1 of the IP Office.

**Additional Requirements**

- Microsoft Internet Explorer 5.5 or higher.

**Email Notification**

The CBC can send email notification of alarms to up to two specified email addresses. This uses MAPI and requires the CBC PC to have a MAPI compliant email application installed and configured for MAPI operation.

The CBC must be running under the same user account as configured for the above MAPI operation.
Entering the CBC License

CBC is a licensed application, with one license required per copy of CBC being run. License areas entered into the IP Office configuration and are unique to the serial number of the system's Feature Key.

Features keys are available in parallel port, USB port and serial port forms. The serial port version plugs directly into the control unit of IP Office Small Office Edition, IP406 V2 and IP412 systems. The parallel port and USB port versions plug into a PC that is connected to the IP Office LAN.

This section assumes that an IP Office feature key has already been installed.

- For a parallel port or USB port feature key:
  - The Feature Key Server application must be installed on the same PC as the feature key is inserted. This application is found on the IP Office Administrator Applications CD.
  - It is recommended that the Feature Key Server PC is given a fixed IP address. That address should then be entered as the License Server IP Address in the IP Office configuration (found on the System | System tab).

- For a serial port feature key:
  - The serial port feature key plugs directly into the 9-pin serial port of the control unit.
  - The License Server IP Address in the IP Office configuration (found on the System | System tab) should be set to be blank.

Entering the CBC License

1. Have the license ready, preferably in an electronic form that can be cut and pasted into the configuration.
2. Start IP Office Manager and click to load the IP Office configuration.
3. In the left-hand panel, click License.
4. Double-click on the right-hand panel.
5. Enter the CBC license key and click OK. It should appear as Compact Business Center with a Status of Unknown.
6. Click the configuration back to the IP Office.
7. Click and reload the IP Office configuration.
8. Check that the license's Status is now Valid.
Installing Delta Server
These instructions cover installation of the IP Office Delta Server onto a networked PC from the IP Office Administrator Applications CD.

1. Insert the IP Office Administrator Applications CD into the CD Drive.
2. The CD should auto-start and display an Chose Setup Language dialog. Click Cancel to close the automatic installation.
3. Select My computer or Windows Explorer.
4. Right click on the drive containing the CD and select Open or Explore.
5. Open the CBC folder. This should contain two sub-folders, one for CBC itself and one for Delta Server.
6. Open the Delta Server folder.
7. Double click setup.exe.
8. Select the language for the installation and click OK.
9. The Delta Server Installshield Wizard is then started.
10. At the Welcome screen click Next to continue.
11. At the completed installation screen, click Finish.
12. The IP Office Delta Server is now installed to run as a Windows Service on the PC. Following initial installation the service is not started until either the PC is restarted or the service is started manually, see Starting the Delta Server Service.
Starting the Delta Server Service

The IP Office Delta Server is installed to run as a Windows Service called CCC Delta Server. It can be stopped and started through the standard Services element of the Windows Control Panel.

Following normal installation, the service is installed but not started. The service is set to start automatically following a PC restart, however it can also be started manually.

To start or stop the CCC Delta Server service:

1. Click **Start**.
2. Select **Settings** and click **Control Panel**.
3. Double-click **Administrative Tools**.
4. Double-click **Services**.
5. Click on the CCC Delta Server service to select it.
6. Click on the **Start** icon to start the service. A dialog should appear reporting that Windows is attempting to start the service. If successful the service status will change to **Started**.
7. The **Service** panel can be used to start, stop and configure the CCC Delta Server service as standard for any Windows services.
8. Close the **Service** panel and if necessary the Windows **Control Panel**.
9. If this is the first time the CCC Delta Server service has been started, proceed to Accessing the Delta Server.
Accessing the Delta Server

The Delta Server runs as a Windows service which is started/stopped through the Service option of the Windows Control Panel. However to configure and manage the Delta Service, it is accessed through a web browser interface.

1. Click **Start**.
2. Select **Programs | CCC**.
3. Click **Delta Server**.
4. Internet Explorer should start and access the address **http://client:8080**.

![Delta Server Access Interface](image)

5. If the Delta Server has just been installed, you need to configure with which IP Office system it communicates. Proceed to Comms (IP Office) Configuration.

Problems Accessing the Delta Server

If you encounter problems connecting to the IP Office SMDR (Delta Server) using Internet Explorer. You may need to enable Bypass proxy for local addresses. To enable this option:

1. In Internet Explorer Select **Tools | Internet Options**...
2. Select the **Connections** Tab
3. Click **LAN Settings**
4. In the Proxy server part of the window check **Bypass proxy for local addresses**.
**Comms (IP Office) Configuration**

The Delta Server Comms screen is used to set with IP Office the Delta Server communicates.

1. Access the Delta Server using **Start | Programs | CCC | Delta Server**.

2. In the left-hand panel click **Comms**.

3. Select the required IP Office system from the **Connection** drop-down.

4. If the require system is not listed, enter its IP address in the **Search** box and click **Search**.

   - The Multimedia options relate to IP Office CCC installation and are not covered here.

5. Once the correct system is selected, click **Apply**.

6. Proceed to Installing the CBC Software.

Note: If the IP Office name or IP address is changed, it is essential to reconnect the IP Office SMDR.
Installing the CBC Software

1. Insert the IP Office Administrator Applications CD into the CD Drive.
2. The CD should auto-start and display an Chose Setup Language dialog. Click **Cancel** to close the automatic installation.
3. Select **My computer** or **Windows Explorer**.
4. Right click on the drive containing the CD and select **Open** or **Explore**.
5. Open the **CBC** folder. This should contain two sub-folders, one for CBC itself and one for Delta Server.
6. Open the **CBC** sub-folder (the sub-folder may be labeled with the CBC version).
7. Double click **setup.exe**.
8. Chose the required installation language and click **OK**.
9. The InstallShield Wizard will start. Click **Next**.
10. The software will now start being installed. When completed click **Finish**.
11. The CBC is not configured to auto-start. Data is not collected for periods when CBC is not running. Therefore it is recommend that you copy the CBC program shortcut (**Start | Programs | CCC | CBC**) to the Startup folder (**Start | Programs | Startup**).
12. Proceed to Starting CBC (First Time).

Starting CBC (First Time)

1. Click **Start**.
2. Select **Programs** and then **CCC**.
3. Click **CBC**.
4. As this is the first time CBC has been started, it will perform a network search for the IP Office Delta Server.

![Find Server dialog box](image)

5. The name of the PC running the Delta Server should appear in the list. Click the name to select it and then click **Connect**.
6. The CBC will now start its initial configuration.

7. Click on the first button. The **Dn Search** windows menu is displayed.
8. Use this to select the group required and then click on **OK**. Selecting a shift time limits the period during which alarms may occur.

9. Repeat for the other groups, then click **OK**.

10. An configuration menu for email notification is displayed. This requires that the CBC PC has a configured MAPI compliant email client such as Outlook.

11. Click **OK**.

12. The CBC application is now started with an almost blank screen.

13. Proceed to Creating Charts.
Creating Charts

1. Initially CBC starts with four blank chart areas.

2. Click or right-click on the chart area and select **New Chart**. This starts the **Display Setup Wizard**.
3. Click the quadrant in which you want the chart to appear and click **Next**.

4. Select the chart type from 2D line, 2D bar, Area, 3D line, 3D bar and 3D area. Then click **Next**.

5. Select the **Dn** (directory number) that you want to report on. The drop down list will include only those supported by CBC, ie. groups with login agents, line, voicemail trunks and conference channels.
6. Select the data variables and the data type (internal, external or all) that you want plotted for the selected DN. You can select up to 4 variables.

- **Presented**: The total number of calls presented.
- **Answered**: The total number of calls presented and answered.
- **Lost**: The number of total calls presented or queued but not answered.
- **Outgoing**: The total number of outgoing attempts including internally made calls.
- **Available Agents**: The number of available agents that are logged on.
- **Available Lines**: The total number of free lines and busy lines in use i.e. trunk utilization.
- **Calls Waiting**: The number of calls alerting a device.
- **Active I/C Calls**: The number of calls currently in progress across the entire system.
- **Active O/G Calls**: The number of calls currently in progress across the entire system.
- **Queued**: The number of calls being queued. This does not include calls alerting a device.
- **Caller Patience**: The average time the an ACD call was in queue before lost. (Only Available if the Variable Data Type is set to External).

7. Having selected the variables to plot, click **Next**.

---

**Display Setup Wizard**

- **Variable Data Type**: All, External, Internal

**Variables**

- **Available Agents**
- **Answered**
- **Lost**
- **Outgoing**
- **Available Agents**
- **Available Lines**
- **Calls Waiting**
- **Active I/C Calls**
- **Active O/G Calls**
- **Queued**

**Variable - Time Scale Selection**

<table>
<thead>
<tr>
<th>Variable</th>
<th>Real Time</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available Agents</td>
<td>Yes</td>
<td>-</td>
</tr>
<tr>
<td>Answered</td>
<td>Yes</td>
<td>-</td>
</tr>
<tr>
<td>Lost</td>
<td>Yes</td>
<td>-</td>
</tr>
<tr>
<td>[None]</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

Click in the date column to select a date or in the 'real time' column for live data.

---

**Display Setup Wizard**

- **Cancel**
- **< Back**
- **Next >**
8. This step of the wizard allows you to select to view either historical data or real time information.
   - To view historical data for a variable, click on the date field and select a date from the calendar. This can be any day in the last 31 days.
   - To view real time data for a variable, click on the Real Time field.

9. Click Next>.

10. This step of the wizard allows you to assign colors to various parts of the plotted graph. When all the changes have been made click Next>.

11. The final step of the wizard allows you to choose whether you want to show a label or not.
12. Click on the **Finish** button when you have made all your changes.

To make changes to the chart, right-click on it and select **Edit Chart**.
Using CBC

Starting CBC (Normal)

1. Click Start and select Programs.
2. Select CCC and click on CBC.
3. If Reconnect to last known Delta Server is checked, the CBC will attempt this and then run as previously configured.
4. If the Delta Server could not be found or Reconnect to last know Delta Server was unchecked, the Find Server dialog appears.

5. Use this to locate the name of the PC running the Delta Server. Select that name when shown and click Connect.
Change the Selected Groups

The CBC can record and display data for up to 3 agent hunt groups. These groups are selected when the CBC is connected to a particular IP Office for the first time.

You can change the selected groups if necessary. Note however that doing this will cause the lose of all existing data and chart settings.

1. **WARNING:** All original data will be lost when you change the Groups Configuration.
2. From the **File** menu, select **Groups**.
3. The **Groups Configuration** Screen is displayed.

4. Click on the first button. The **Dn Search** windows menu is displayed.

5. Enter the shift period.
6. Click the **OK** button.
7. Repeat for the other groups and then click **OK**.
Key Performance Indicators

The bottom of the CBC screen shows a range of 'key performance indicators' for the system. These are either current figures or cumulative for the current day.

These details are updated every 10 seconds.

<table>
<thead>
<tr>
<th>Active Alarms: None</th>
<th>Last Alarm: None [00:30:00 - 00:00:00]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calls Presented: 0</td>
<td>Available Lines: 12</td>
</tr>
<tr>
<td>Calls Answered: 0</td>
<td>Available Agents: 4</td>
</tr>
<tr>
<td>Calls Lost: 0</td>
<td>Calls Queued: 0</td>
</tr>
<tr>
<td>Active Incoming Calls: 0</td>
<td>Caller Patience: 00:00:00.00</td>
</tr>
<tr>
<td>Active Outgoing Calls: 0</td>
<td>Longest Call Waiting: 00:00:00.00</td>
</tr>
<tr>
<td>Outgoing: 0</td>
<td></td>
</tr>
</tbody>
</table>

- **Active Alarms**
  Shows if any alarms are currently active. If a single alarm is active, its name is shown. If several alarms are active, *Multiple* is shown. See Alarms for further details.

- **Last Alarm**
  Shows the last alarm and when it occurred.

- **Calls Presented**
  The number of calls presented both internally and externally.

- **Calls Answered**
  The total number of calls that answered. The percentage figure is the percentage of calls answered against calls presented.

- **Calls Lost**
  The total number of calls lost. The percentage figure is the percentage of calls lost against calls presented.

- **Active Incoming Calls**
  The number of incoming calls currently in progress.

- **Active Outgoing Calls**
  The number of outgoing calls currently in progress. Note that internal calls are also seen as outgoing.

- **Outgoing**
  The total number of calls made during the day.

- **Calls Queued**
  The total number of calls in a queue, which are not ringing on a phone (both internal and external).

- **Available Lines**
  The total number of free and busy lines available. i.e. trunk utilization. The percentage figure shows the percentage of total lines in comparison to the available lines.

- **Available Agents**
  This shows the number of agents logged on. The percentage figure shows the number of agents in a ready state as a percentage of all agents on the telephone switch.

- **Caller Patience**
  The average waiting time by a caller at the point when the call was lost.

- **Longest Call Waiting**
  The duration of the longest active call waiting.
**Trunk Utilization Graph**

The trunk utilization graph displays the trunk utilization for the IP Office. The trunk utilization graph can be opened in a number of ways:

1. Click the icon or select **File** and then **Trunk Utilization Graphs**.

2. Select either **Daily** or **Weekly**.

3. When opened, the graphs always default to the current day. You can select to view a particular end date. Click **Change End Date** and select the date required.

4. The trunk utilization graph shows the trunk utilization of all lines (except IP) on the IP Office system. The different colors of the chart indicate the level of trunk utilization.
   - **White** = Up to 20% utilization.
   - **Light Green** = Up to 45% utilization.
   - **Dark Green** = Up to 60% utilization.
   - **Yellow** = Up to 75% utilization.
   - **Red** = Over 75% utilization.

5. To close the graph click **Cancel**.
Zooming Into Charts

When viewing charts on the user interface you can zoom into the chart. To zoom into a particular section of the chart:

1. Drag your mouse over the chart whilst holding the left mouse button down, so that a square appears.

2. When you let go of the mouse button, the chart will zoom into the area selected.

The charts below show an example of gradually zooming in to an area of the chart.

To expand the view make your selection beyond the edge of the charts (all four charts). When you let go of the mouse button, the whole shift time period will show.
Amending Charts
If you want to change an existing chart:

1. Right-click on the chart.
2. Select Edit Chart.
3. The Display Setup Wizard is rerun. See Creating Charts.

Deleting Charts
To delete an existing chart:

1. Right-mouse the existing chart.
2. Select Remove Chart.

CBC Alarms
The CBC provides a number of pre-defined alarms. The alarms will notify the business of issues which may require action.

The following pre-defined alarms are available:

- **Lost Call Alarm**
  This alarm is triggered when the percentage of lost calls exceeds 10% of the calls presented. The alarm is reset when the percentage returns to less than or equal to 9%.

- **Trunk Utilization Alarm**
  This alarm is triggered when the percentage trunk utilization exceeds 75% of the total available trunks. The alarm is reset when the percentage returns to less than 70%.

- **Calls Queued Alarm**
  This alarm is triggered when the number of calls queued is greater than 4. The alarm is reset when the number of calls queued is less than 4.

- **Available Agents Alarm**
  This alarm is triggered when the percentage of available agents is less than 10% of the total logged in agents. The alarm is reset when the percentage returns to greater or equal to 11%.

**Note:** Alarms will not be triggered until one minute has elapsed after the CBC has been started.

Alarm Notification
When an alarm is triggered the CBC can notify you of the alarm in a number of ways:

- In the CBC charts, if a variable being plotted has exceeded its alarm value, a {!} is shown next to its name in the chart legend.

- The Key Performance Indicators area of the CBC screen will indicate the alarm name and when it occurred.

- An Alarm icon 🚨 is shown against the Key Performance Indicator that is alarming.

- If email notification is on, the daily email will include details of the alarm. See Email Notification.
Email Notification

Email notification enables a summary of CBC alarms to be sent to two specified email addresses at the end of each day. The current status of email notification is shown at the bottom of the CBC screen.

To activate email notification

1. Click **File** and then **Email Notification**.

2. Select **Notification On**

3. Enter a name for the system in **Location Identified As**. This must be completed.

4. At least one of the following two email addresses must be completed. The addresses used must be fully qualified internet email addresses.

5. Click **Finish**

A sample email is shown below...

Dear user1@test.avaya.com,

Your Avaya(TM) Compact Business Center located at Site One CBC has reported the alarms listed below. Please refer to the individual alarm listing for a suggestion on corrective action.

---

Alarm: Lost
Time: 08:59:10
Date: 03/17/2004
Suggested Action:
For your business, the rate of customers who abandon while waiting to be helped is high. Are your peak hours staffed correctly?

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<td></td>
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