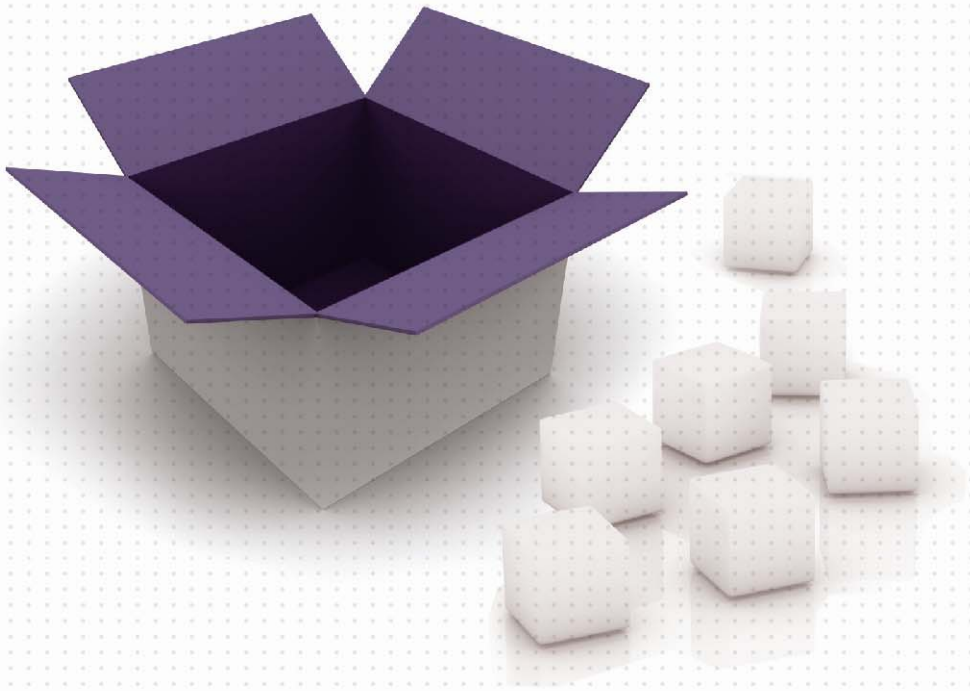


InConcert Allegro

Provisioning
Manual

inConcert
CONTACT CENTER TECHNOLOGY

#

Contents

Installation Requirements and Process

In order to install and configure InConcert Allegro we need to complete four steps:

- Acquire the necessary software and hardware for the servers and the individual agents' working stations
- Assign human resources
- Sign contracts with Telco services providers
- Configure the Virtual Call Center (VCC)

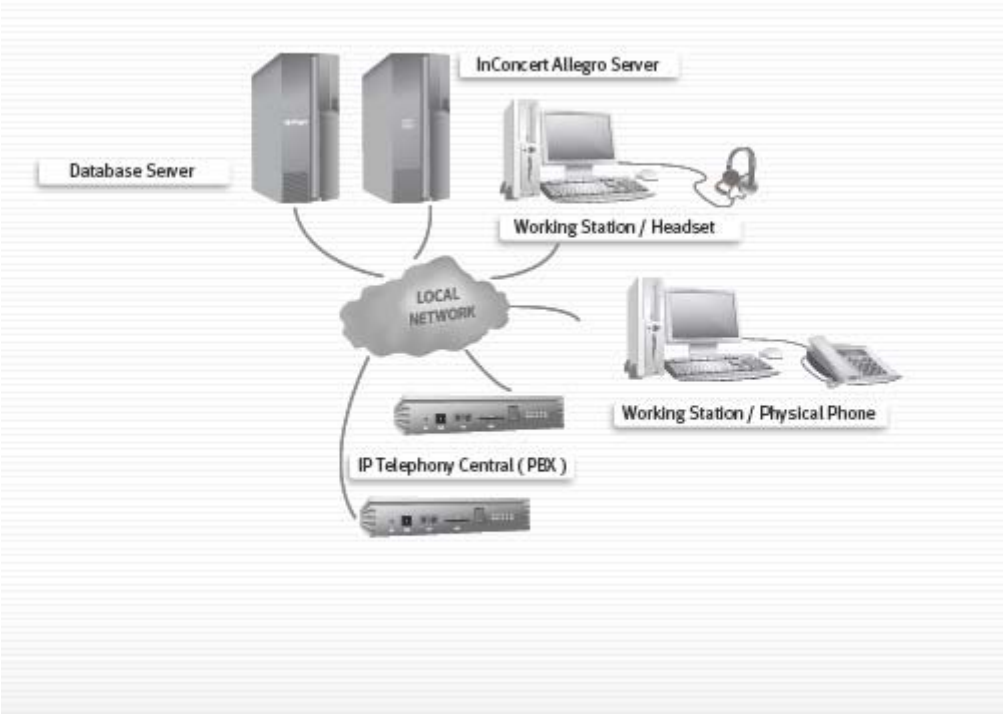
The first step is to set up the servers and the agent's working stations.

The main server will need an Operating System and the InConcert Allegro Software for servers.

In a typical installation the main servers are:

- Database Server
- InConcert Allegro Server that will host the different services necessary for the VCC
- IP Telephony Server

The agents' working stations will have the InConcert Client software installed. This software integrates an IP phone into the computer, so a headset is all that's needed to have a functional phone; however, the agent can also use a physical IP phone.

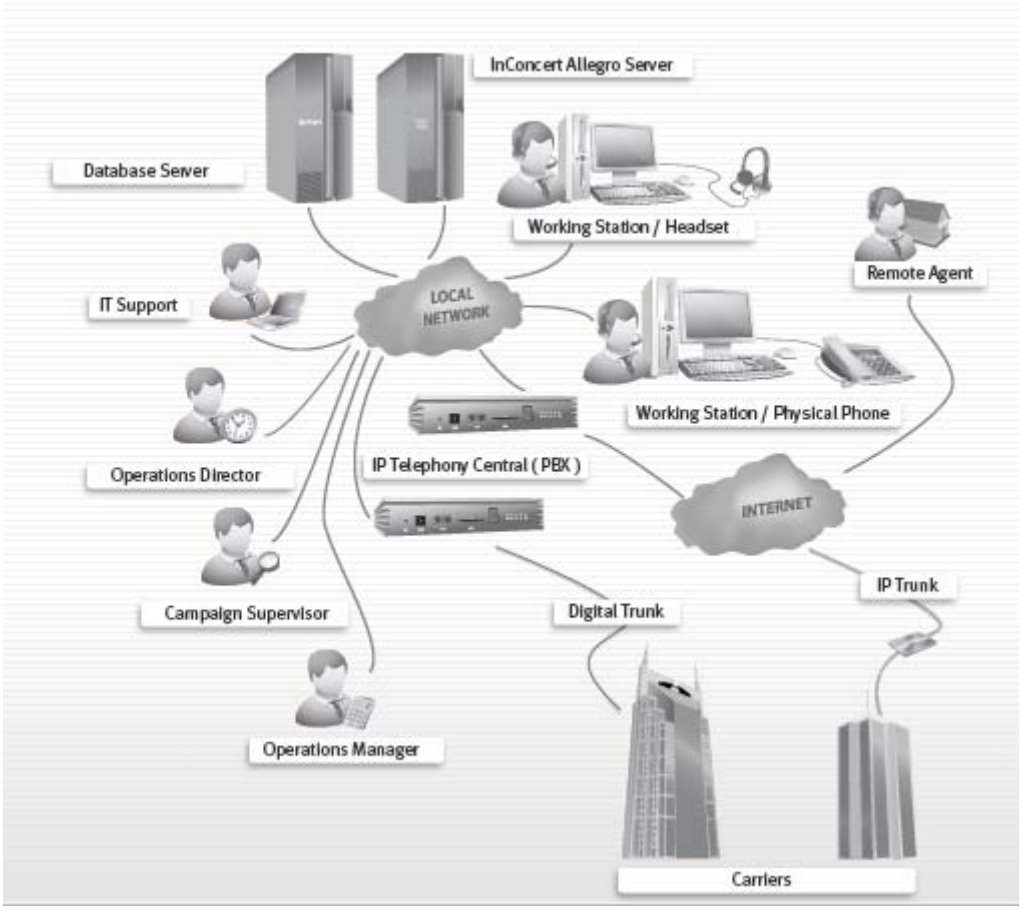


After the installation process, the administrator will define the human resources assigned for each role in the VCCs.

These roles are:

- IT help desk: manages infrastructure, resources and VCCs
- Operations Director: general management of the business, controls fulfillment of goals and contracts, looks after the overall efficiency of the business
- Operations Manager: has knowledge of the different campaigns being carried out in the VCC, performs daily monitoring tasks of the overall performance of the VCC
- Campaign Supervisor: is in charge of campaign performance follow-up, manages the agents' productivity, detects possible problems and issues
- Agent: carries out the campaign

Lastly, the administrator has to set up the connection with Carriers so that the whole network can have communication with the outside world via phone.



In order to proceed with the process of setting up VCCs for a client, the administrator has to configure and distribute the different resources.

To do this, go to the in concert server login screen, and login with:

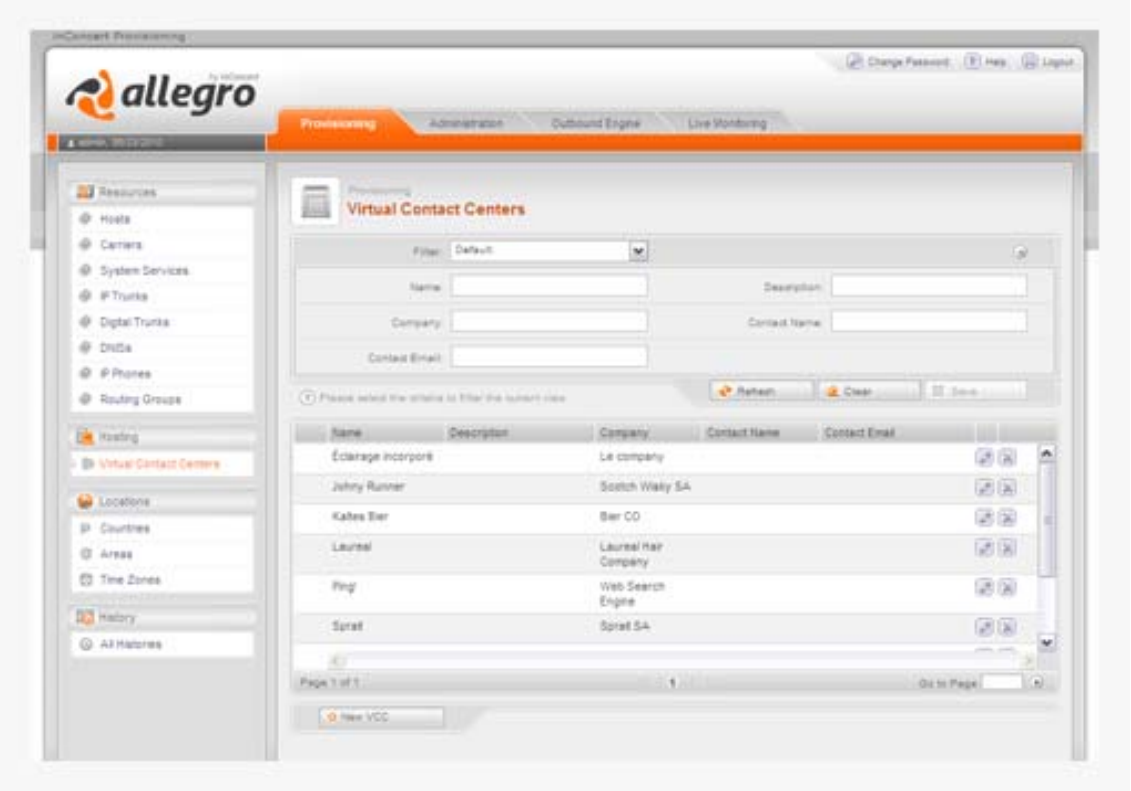
- **Username**: admin
- **Password**: 1111

Once logged into the system, you will see a screen with different tabs and menus.

To the left the main menus are:

- Resources
- Hosting
- Location
- History

Each menu has its sub entries that must be configured before setting up a VCC.


allegro
Provisioning
Administration
Outbound Engine
Live Monitoring
Resources
Hosts
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System Services
IP Trunks
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DNISs
IP Phones
Routing Groups
Hosting
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Locations
Countries
Areas
Time Zones
History
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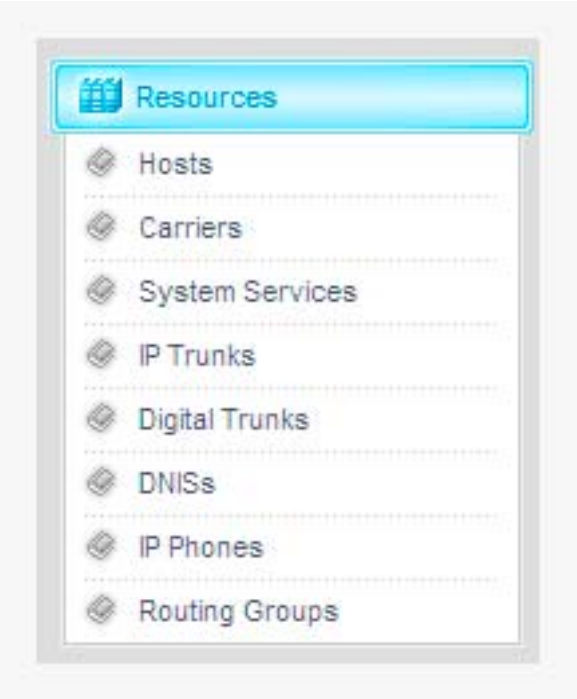
Virtual Contact Centers
Filter
Default
Name
Description
Company
Contact Name
Contact Email
Refresh
Clear
Name
Description
Company
Contact Name
Contact Email
Éclairage incorporé
Le company
Johny Runner
Scotch Wisky SA
Kafes Bar
Bar CO
Laurel
Laurel Hair Company
Ping
Web Search Engine
Sprat
Sprat SA
New VCC

Resources menu

The resources menu contains the resources that require configuration before setting up the VCCs.



As can be seen in the image to the left, the resources menu has 8 submenus that contain the resources to be configured before the administrator is ready to set up VCCs.

These submenus are:

- Hosts
- Carriers
- System Services
- IP Trunks
- Digital Trunks
- DNISs
- IP Phones
- Routing groups

We will analyze each of the submenus in detail. But before, we will see functions that repeat themselves in all of the subsequent menus:

Filter

You can use this tool to define search parameters in order to identify the one or more previously set configurations for each menu.

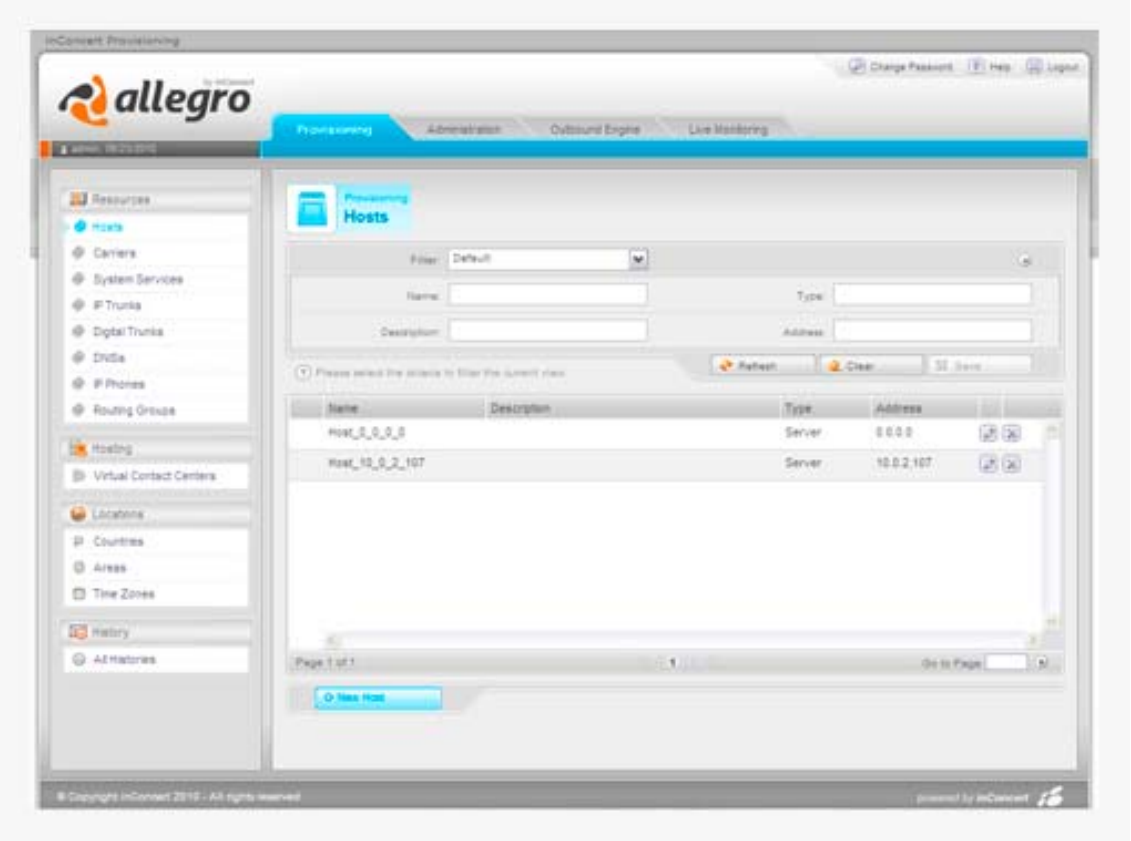
After introducing the desired values in each field, click on the “Refresh” button to retrieve the desired data.

The “Clear” button resets all fields, whereas the “Save” button saves the parameters of the search for future reference.

The ***Edit*** button appears in all the menus, and can be used to edit the settings of each component.

The ***Delete*** button also appears in all the menus, and serves the purpose of deleting unwanted or misconfigured components.

Host



In this menu, we can set the parameters for the hosting of the different servers that will be used for the VCCs.

Initially, the list of hosts is blank, so the administrator will have to create a new host by clicking the "New host" button in the lower part of the screen.

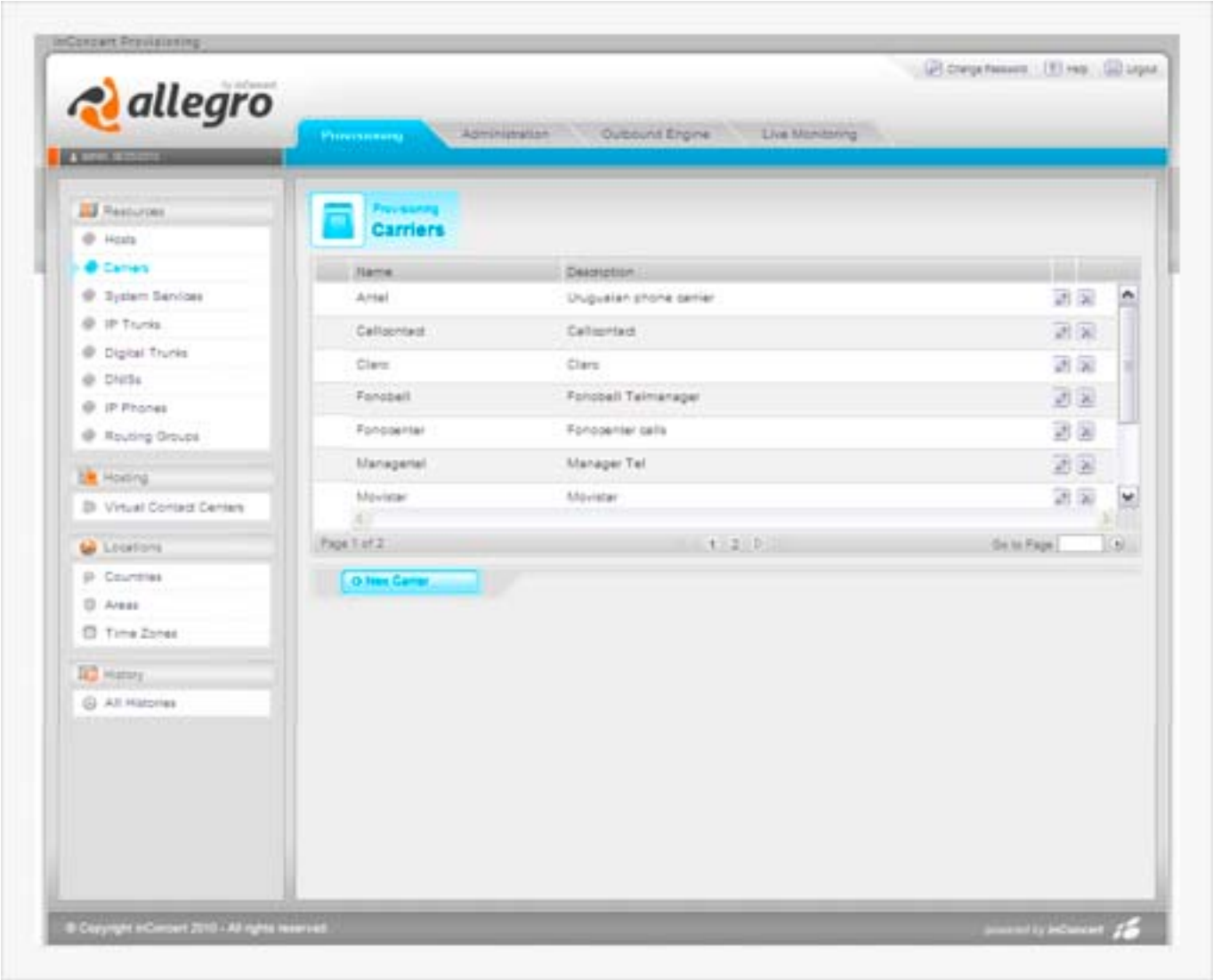
Once clicked, a screen with four fields for the configuration of the host will appear.

These four fields are:

- Name: the name that will identify the host you are creating. For example: Hosting station 125, or HOST_192_168_20_10. This field is mandatory.

- Type: describes the different types of servers that can be available, such as telephony server, database server, etc. This field is optional.
- Description: may contain a brief description of the host, like what is it used for, etc. For example: “Asterisk Server IBM” .This field is optional.
- Address: the IP address of the host. This field is mandatory.

Carriers



The different carriers are the diverse TELCOservice providers available.

Initially, after clicking in the “Carriers” menu, the list is empty. To add a new carrier, click on the “New Carrier” button below the list.

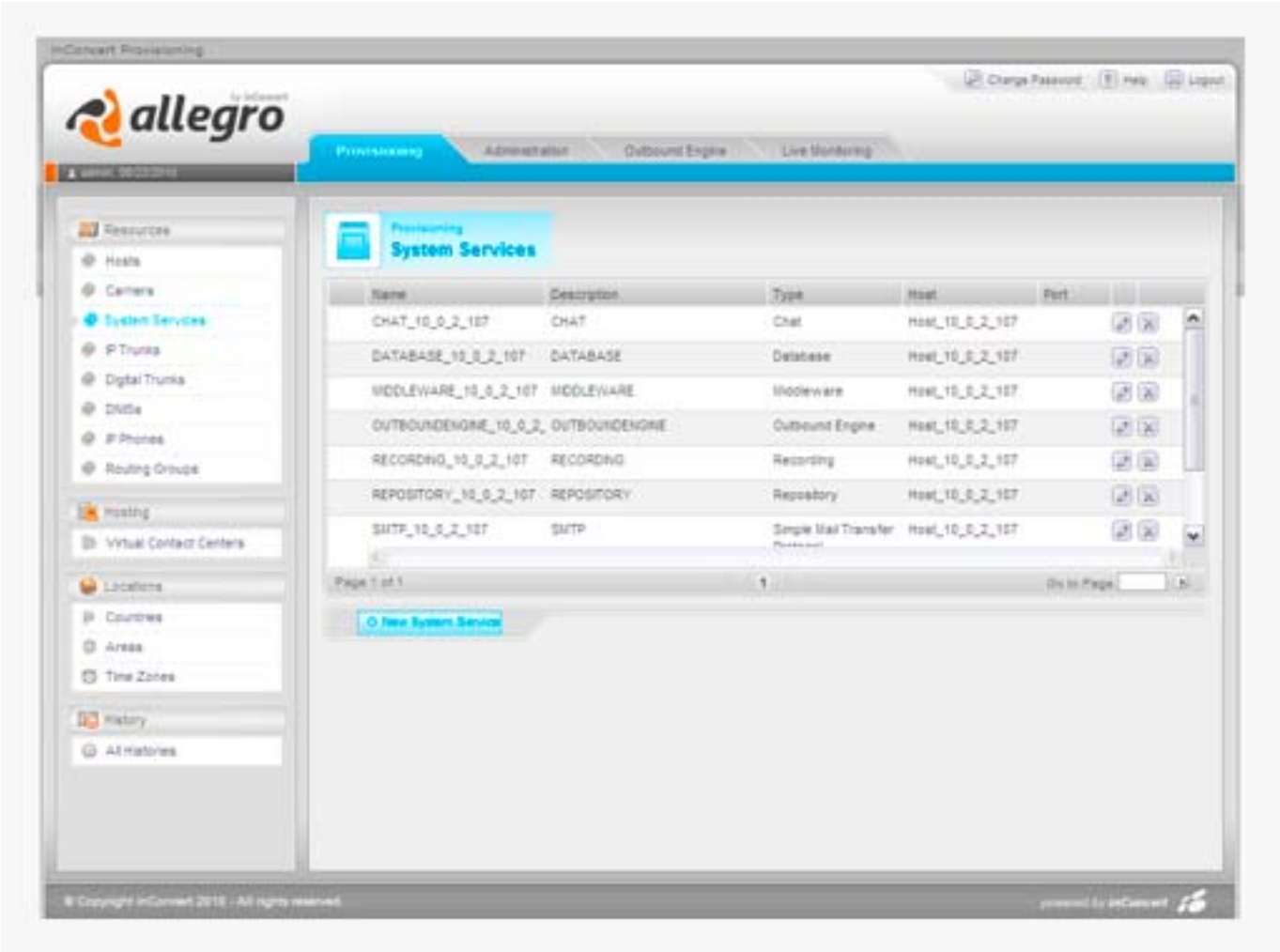
After clicking the button a screen with two fields will appear.

These two fields are:

- Name: indicates the name of the telephony carrier, for example: AT&T, Telefónica, etc. This field is mandatory.
- Description: may contain a brief description of the service. For example: "Local calls only", "Mobile calls and long distance", etc. This field is not mandatory

Once completed, click on the "Save" button to keep the changes; or on the "Discard" button to lose them.

System Services



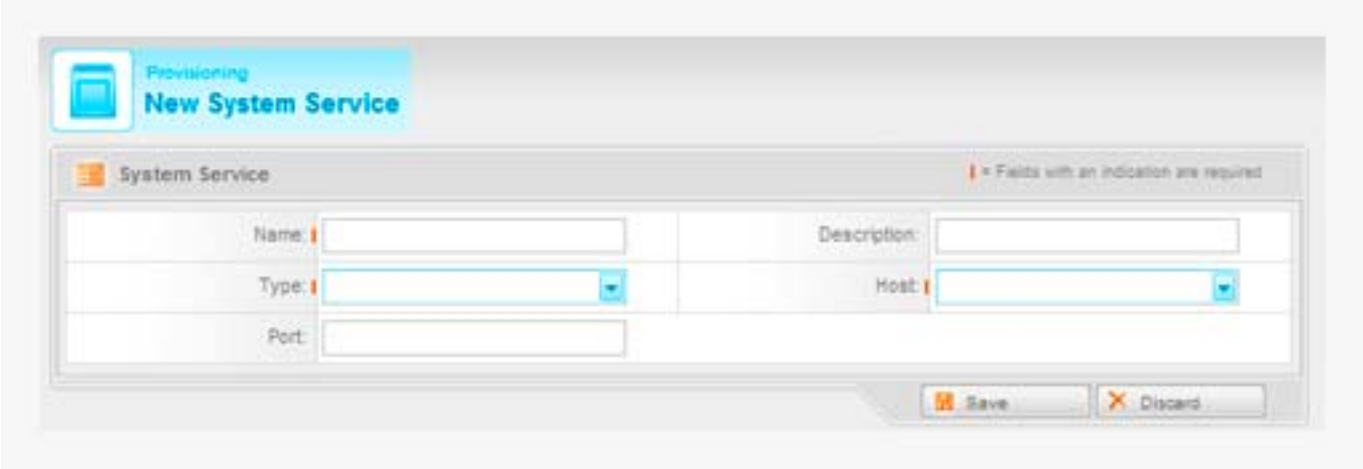
The system services list is already populated with all the different services an InConcert Allegro server has. The services are as follows:

- **Chat:** enables chat sessions between users logged into the system and with people or clients via WEB.
- **Database:** enables access to the database server.
- **Middleware:**is the basic message exchange service that exchanges messages between different processes and allows service integration.
- **Outbound Engine:** enables automated outbound calls.
- **Recording:** enables call recording processes.

- **Repository:** is the server where all the interactions and processes such as phone conversations, chat sessions, etc. are recorded.
- **SMTP:** enables e-mailing actions from the server.
- **Streaming:** allows interaction streaming for monitoring purposes.
- **Telephony:** it's the telephonic server used by the VCCs.

If there is another service the administrator needs to set up, it can be done by clicking on the ***"New Service"*** button below the aforementioned list.

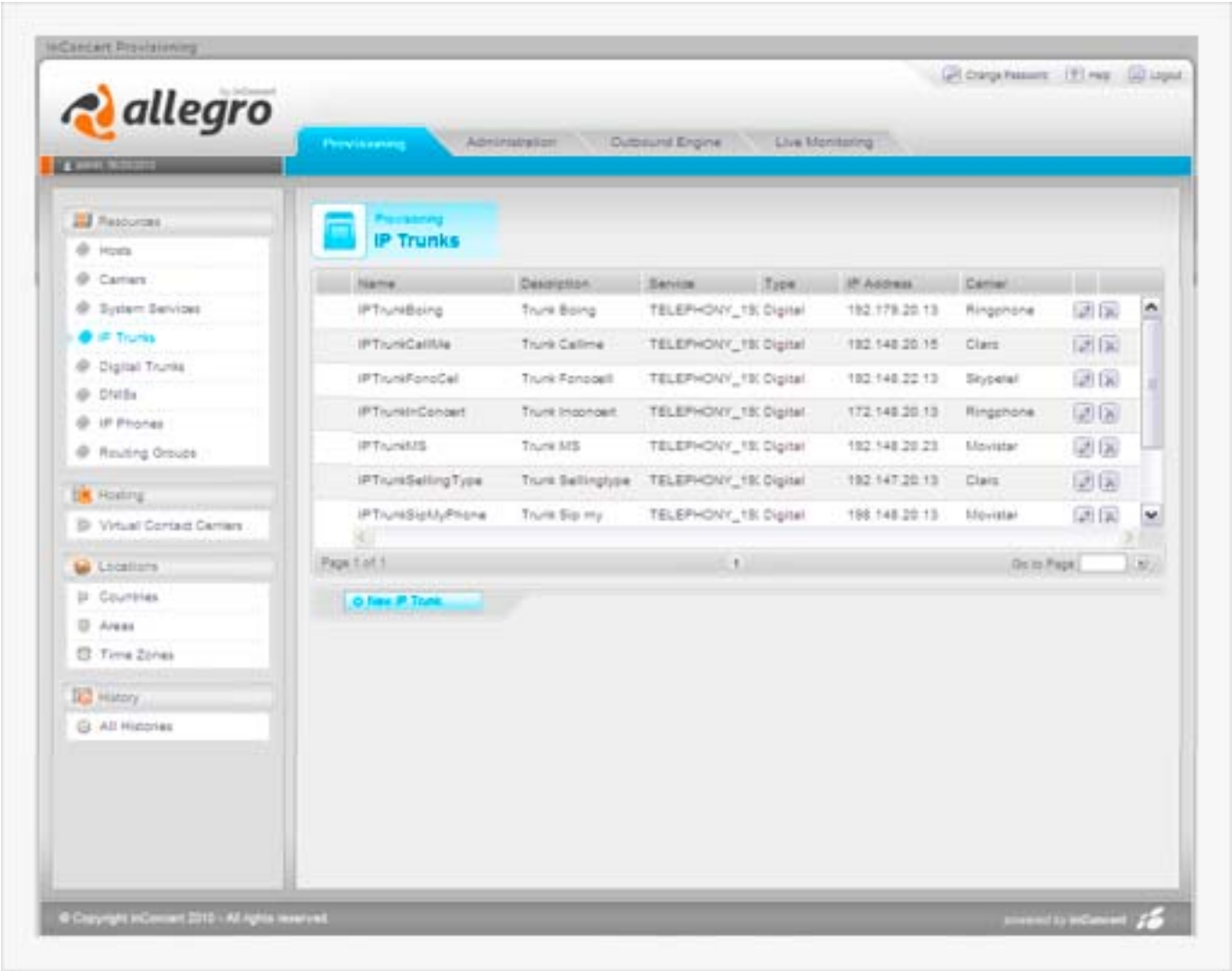
The new service screen will appear, allowing the creation of a new service. The service will necessarily have to be of the same type as the services listed above.



In the "Type" menu, the administrator can choose between the 9 types of services offered (Chat, Database, Middleware, Outbound Engine, Repository, SMTP, Streaming and Telephony).

The administrator also will have to choose a Host location for the service. This "Host" menu is populated by the Hosts that were already set up.

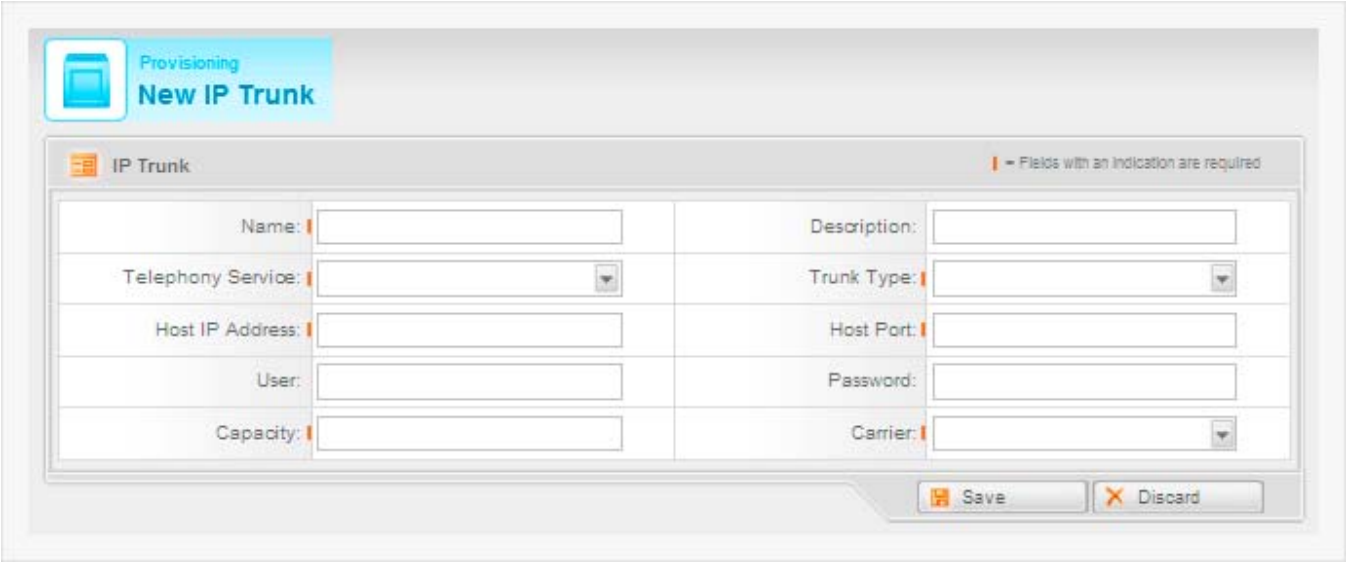
IP Trunks



The IP Trunks screen shows a list of all the configured IP trunks available for selection for each VCC.

An IP Trunk refers to the use of an IP Network to carry voice traffic between two private branch exchanges (PBX) or voice switches.

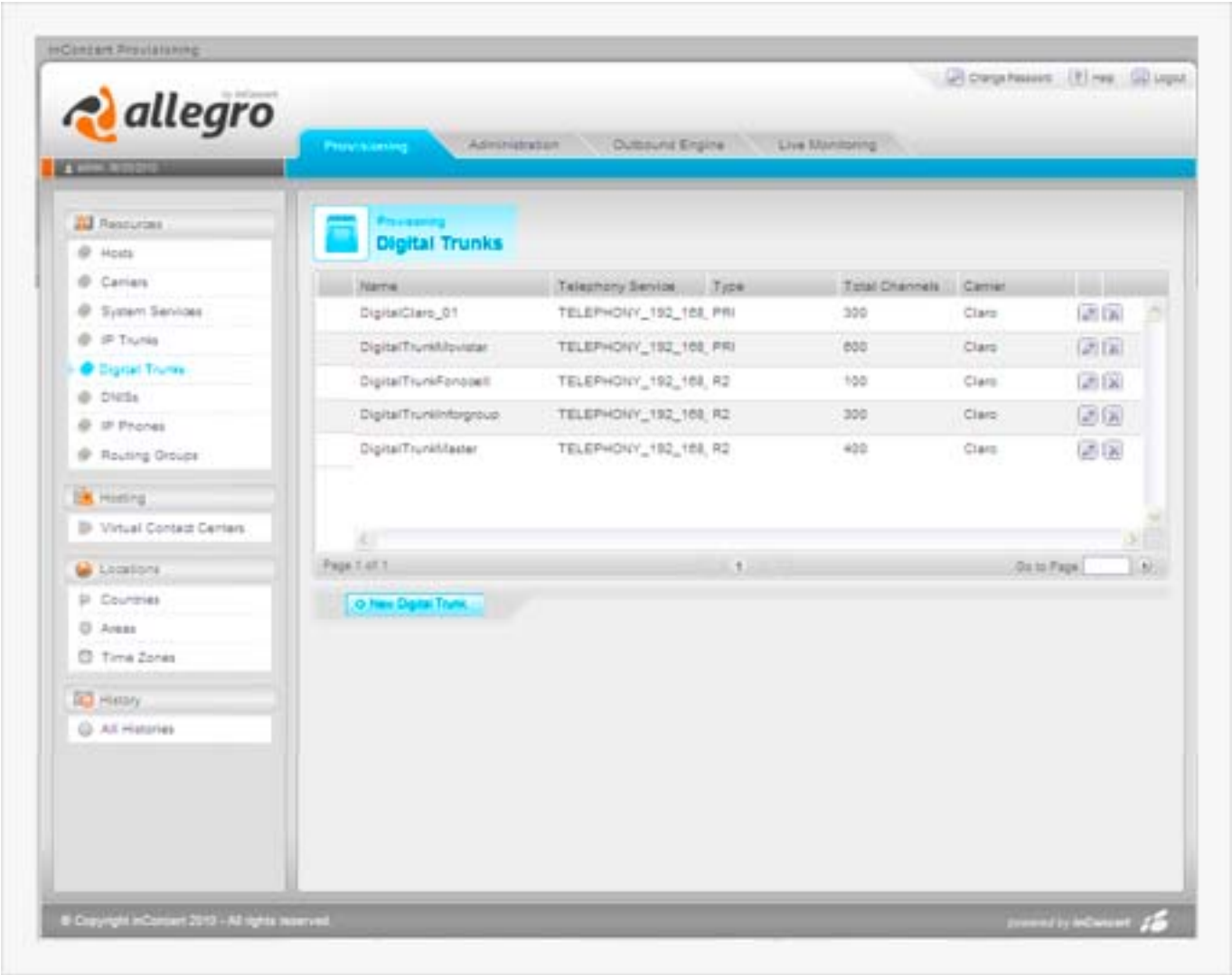
If there aren't any IP trunks configured, then the administrator needs to configure one from scratch.



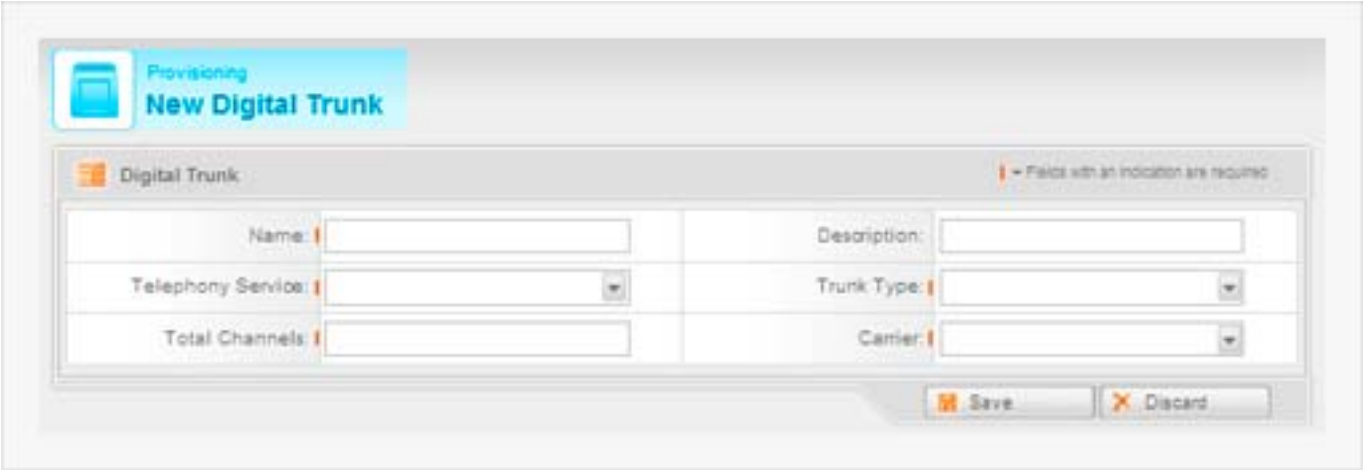
The fields required are:

- **Name**: name of the IP Trunk. This field is mandatory.
- **Description**: may contain details of the IP trunk, such as location, etc. This field is not mandatory.
- **Telephony Service**: the administrator needs to choose from a list of telephony services, which one will provide the lines for the IP trunk. The administrator needs to choose the server for which the trunk has been configured. This field is mandatory.
- **Trunk Type**: chooses from a list of different protocols, which one is associated to the IP trunk. The different protocols can include: SIP, IAX2, H323, etc. This field is mandatory.
- **Host IP address**: indicates the IP address of the host server for the IP trunk. This field is mandatory.
- **Host Port**: the administrator needs to indicate in which port the telephony server has the chosen protocol rightly configured. This field is mandatory.
- **User**: indicates the Username needed to communicate with the trunk, if needed.
- **Password**: assigns a password to the user.
- **Capacity**: Indicates the number of inbound/outbound simultaneous communications the trunk can support. This field is mandatory.
- **Carrier**: indicates the name of the carrier that provides the service for the IP trunk. This field is mandatory.

Digital Trunks



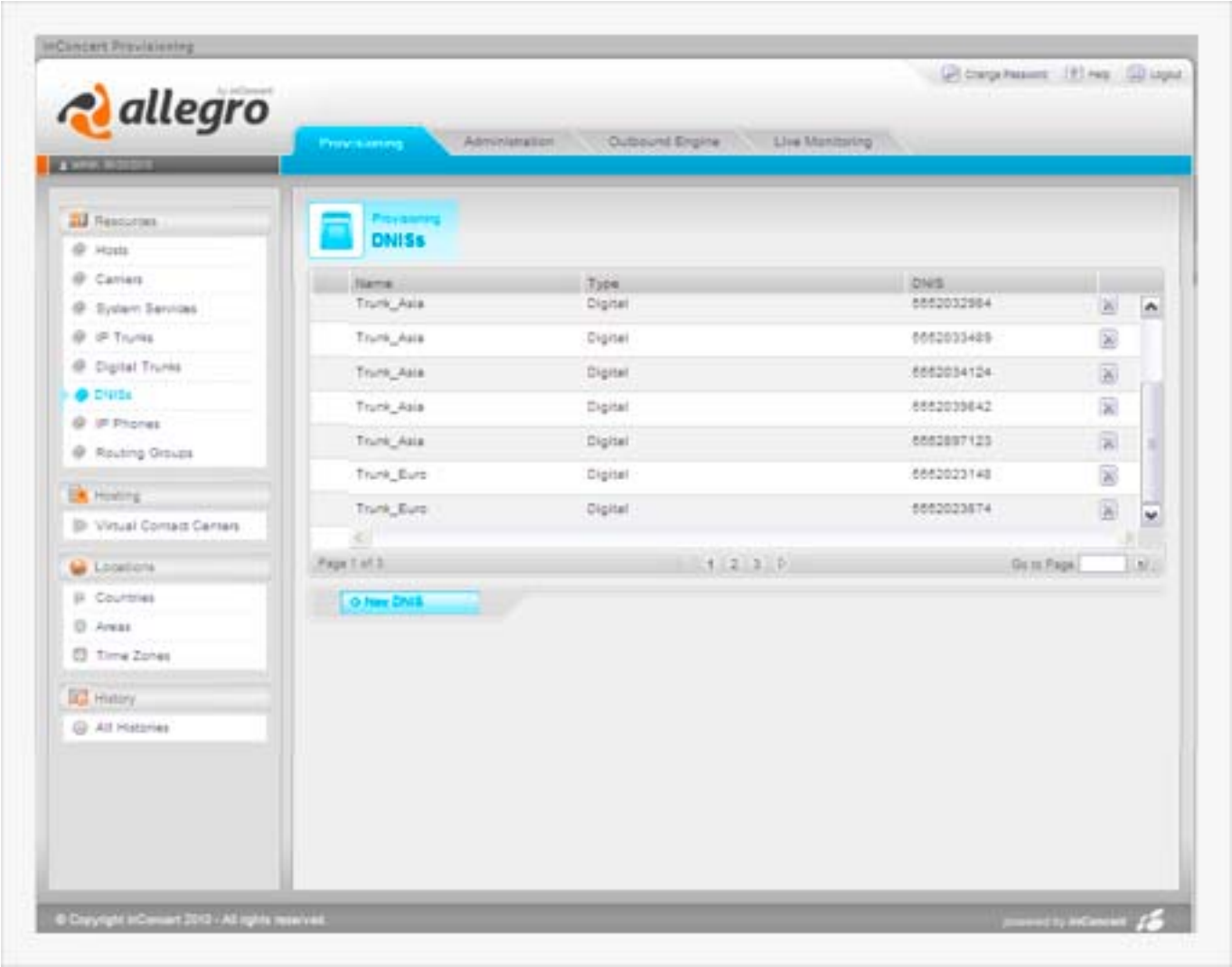
A digital trunk is a group of channels configured against a telephony carrier. These channels can operate under different protocols, for example PRI, R2 and ISDN.



In order to configure a new Digital trunk, the administrator needs to define the following fields:

- **Name**: name of the IP Trunk. This field is mandatory.
- **Description**: may contain details of the IP trunk, such as location, etc. This field is not mandatory.
- **Telephony Service**: the administrator needs to choose from a list of telephony services, which one will provide the lines for the IP trunk. The administrator needs to choose the server for which the trunk has been configured. This field is mandatory.
- **Trunk Type**: chooses from a list of different technologies, which one is associated to the IP trunk. This field is mandatory.
- **Total Channels**: Indicates the number of inbound/outbound simultaneous communications the trunk can support. This field is mandatory.
- **Carrier**: indicates the name of the carrier that provides the service for the IP trunk. In this case, the administrator will use one of the carriers configured beforehand. This field is mandatory.

DNISs



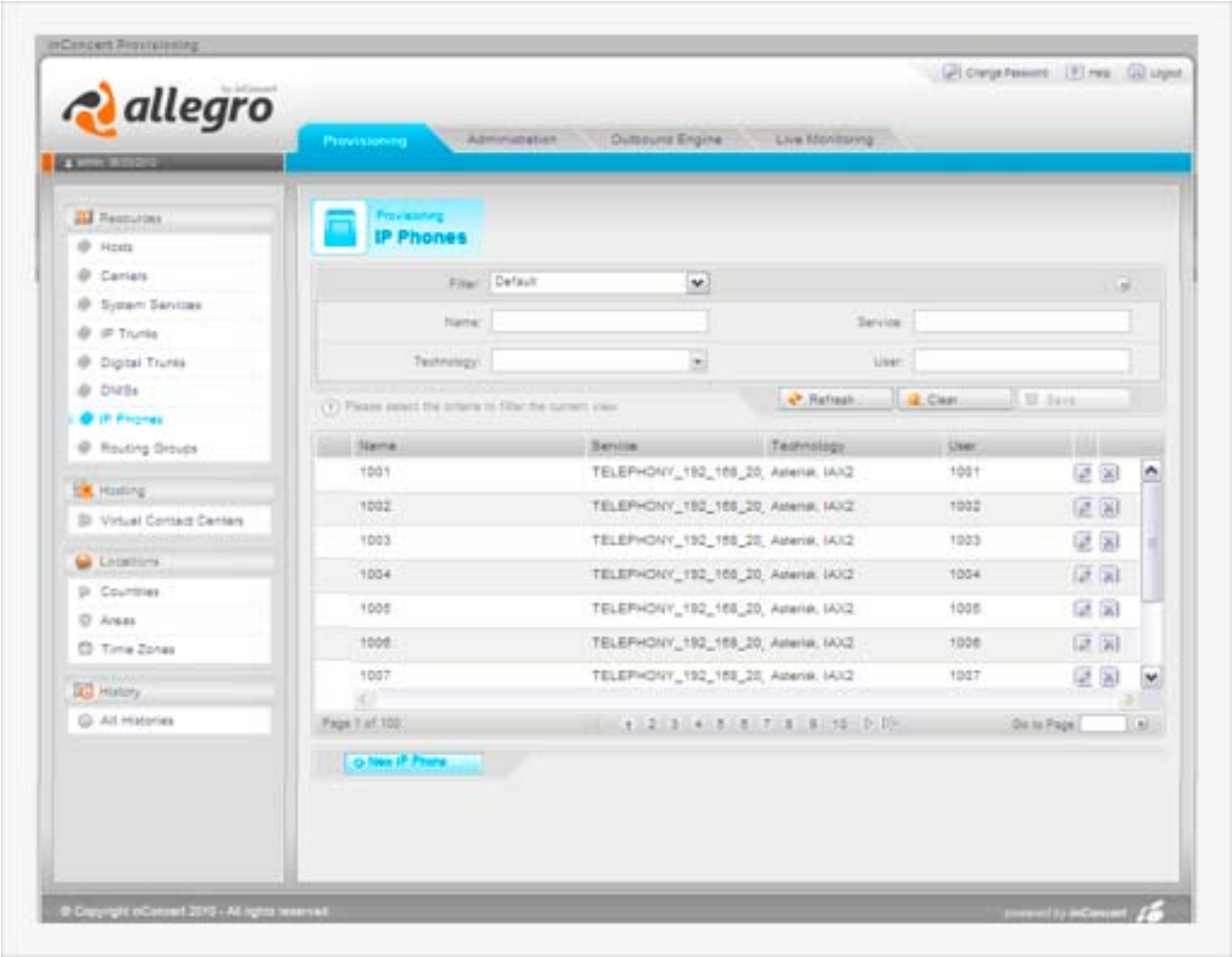
DNIS is an acronym for Dialing Number Identification Service. Different services of this kind may be provided by different carriers, and might be associated with different trunks. In the “Type” column we can read a description of the kind of trunk the service is associated to: digital or IP.

If the list on the DNIS menu is empty, then the administrator will have to create a DNIS, otherwise, the system will not be able to identify callers.

The fields required for the creation of a new DNIS are:

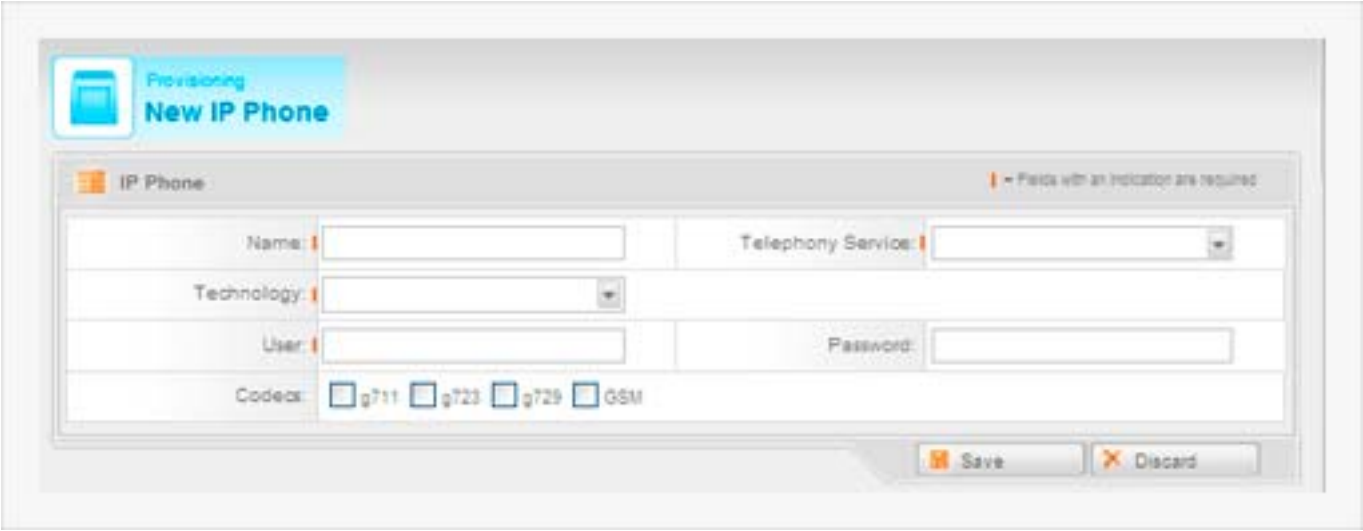
- **Trunk Name**: indicates to which trunk is the identification service associated. This field is mandatory.
- **DNIS**: indicates the number of contract with the DNIS service provider. Typically, the phone number associated to the service. This field is mandatory.

IP Phones



IP phones are telephonic terminals associated to a telephony service. They can be either digital (software based) or physical (actual phones connected to the IP network).

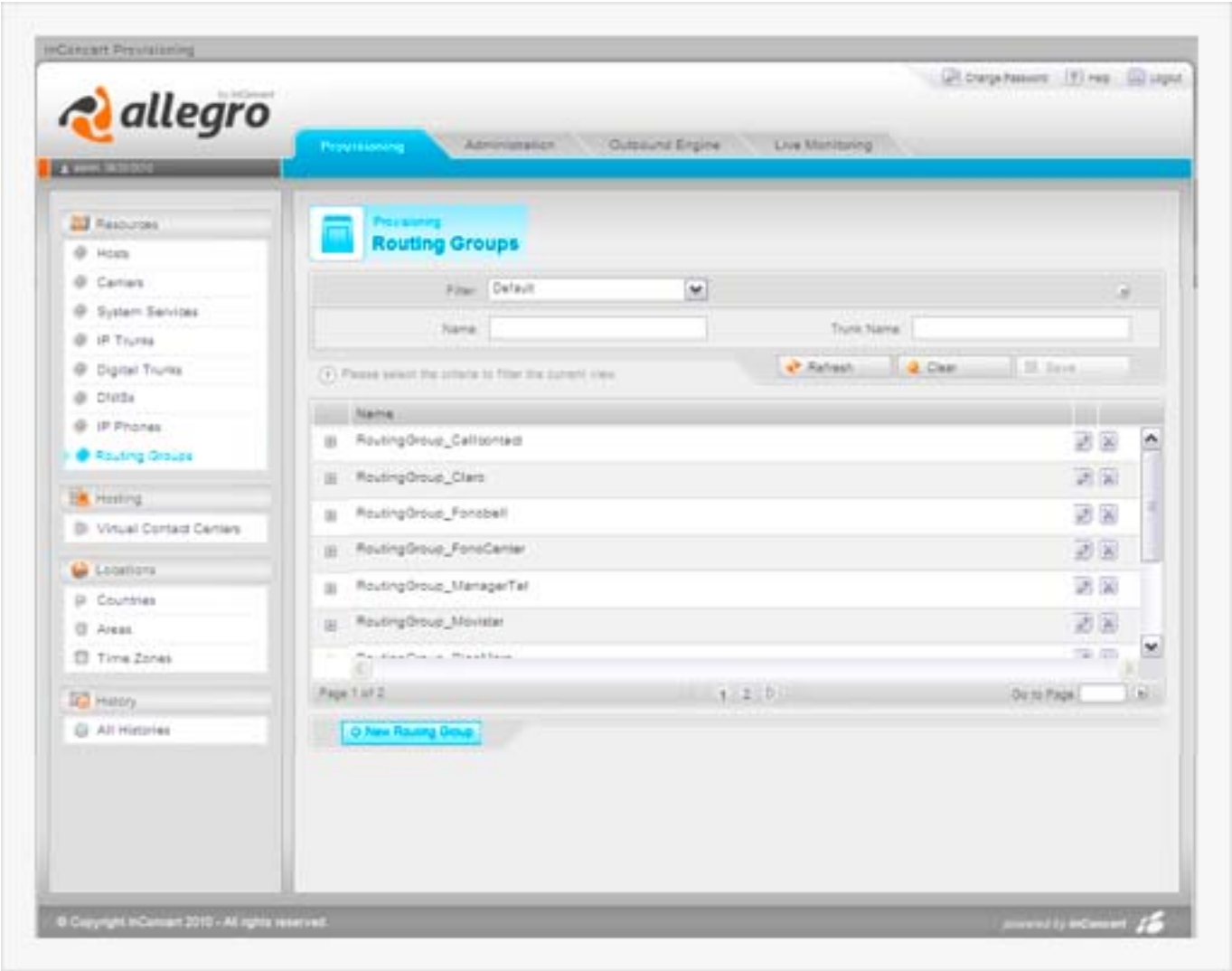
The administrator needs to create all the IP Phones necessary in order to keep the VCC operational.



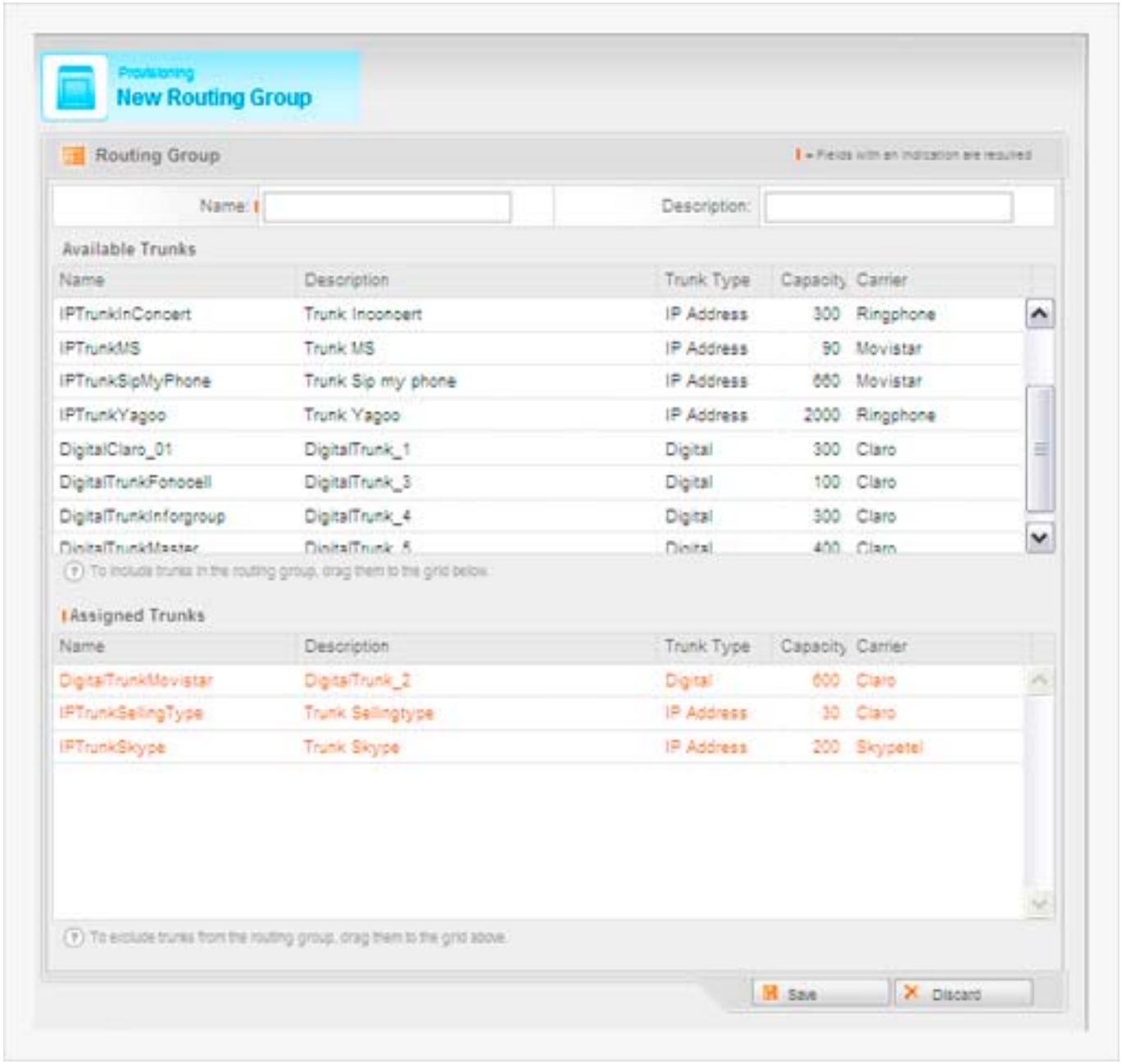
To create a new IP phone the administrator needs to set up the following fields:

- **Name**: a name to identify the terminal from other terminals. All names must be different. This field is mandatory.
- **Telephony Service**: choose the telephony service that will provide the line for the IP phone. This field is mandatory.
- **Technology**: denotes the name of the technology used in the Telephonic Central. This field is mandatory.
- **User**: label for the user associated with the IP phone line. This field is mandatory.
- **Password**: a password for the user associated with the IP phone. This field is not mandatory.
- **Codecs:** in this case the administrator needs to choose an audio codification system, such as GSM. In this case, all the checked boxes will represent an available codec for this phone. If the administrator does not check any box, the system assigns the g711 codec by default.This field is not mandatory.

Routing Groups



Routing groups are Trunk groups used to make calls, either by the automatic dialer or by the agents themselves (manually).A routing group can have as many trunks as the administrator needs.

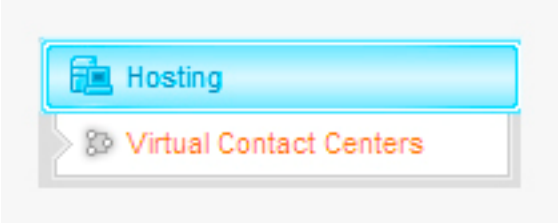


To create a new routing group, the administrator needs to drag the desired trunks from the above list to the below list.

After this process is completed, click on the “Save” button to save the changes made to the Routing Group.

Each routing group needs a name of its own.

Hosting Menu-Setting up a Virtual Contact Center



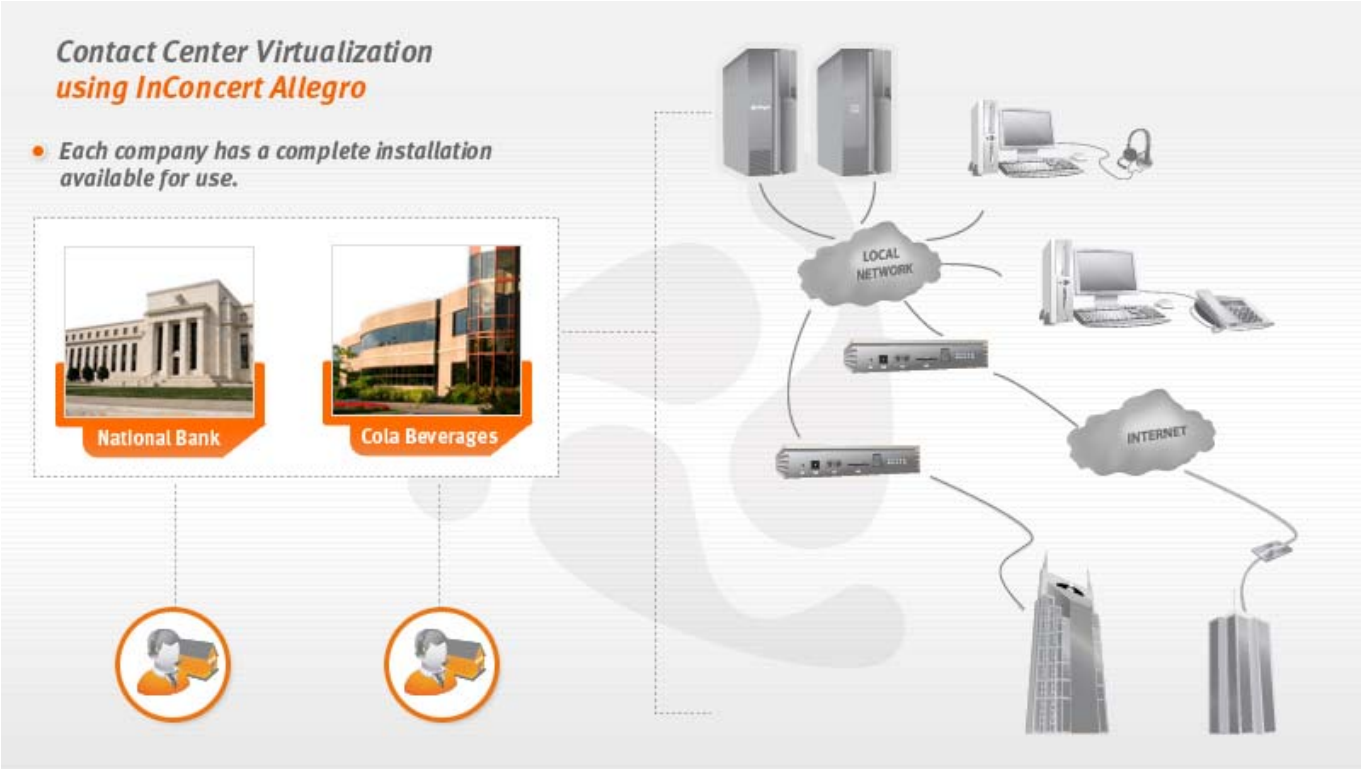
In the "Hosting" menu, there's the "Virtual Contact Center" option. Here, the administrator can create or edit VCCs for different clients.

The administrator can set up several VCCs using the same group of resources.

Each hosting infrastructure has a limited amount of resources that can be distributed among the different VCCs created. These resources are:

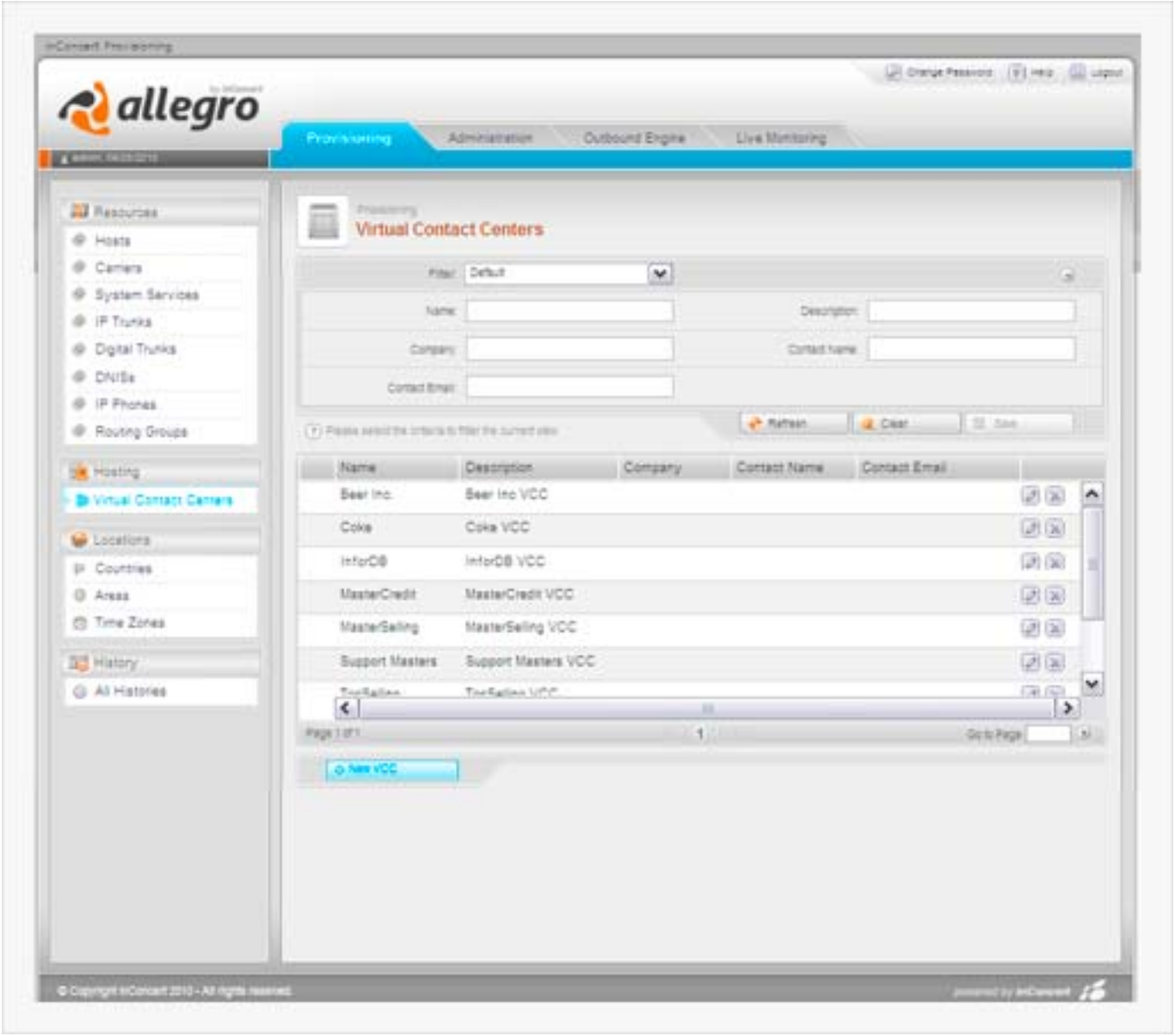
- Servers
- Telephonic Centrals
- IP trunks
- Digital Trunks
- DNIS services
- Licenses
  - Foragents
  - Forsupervisors
  - Number of telephonelines
  - IVR ports
  - RecordingPorts

The Licenses are limited among the servers, and therefore once they've been assigned to one VCC, they will not be available for another VCC. For example: if there's a total of 500 agent licenses, and Coffee Machinery INC has set a VCC with 200 agents, there are 300 available agents' licenses.



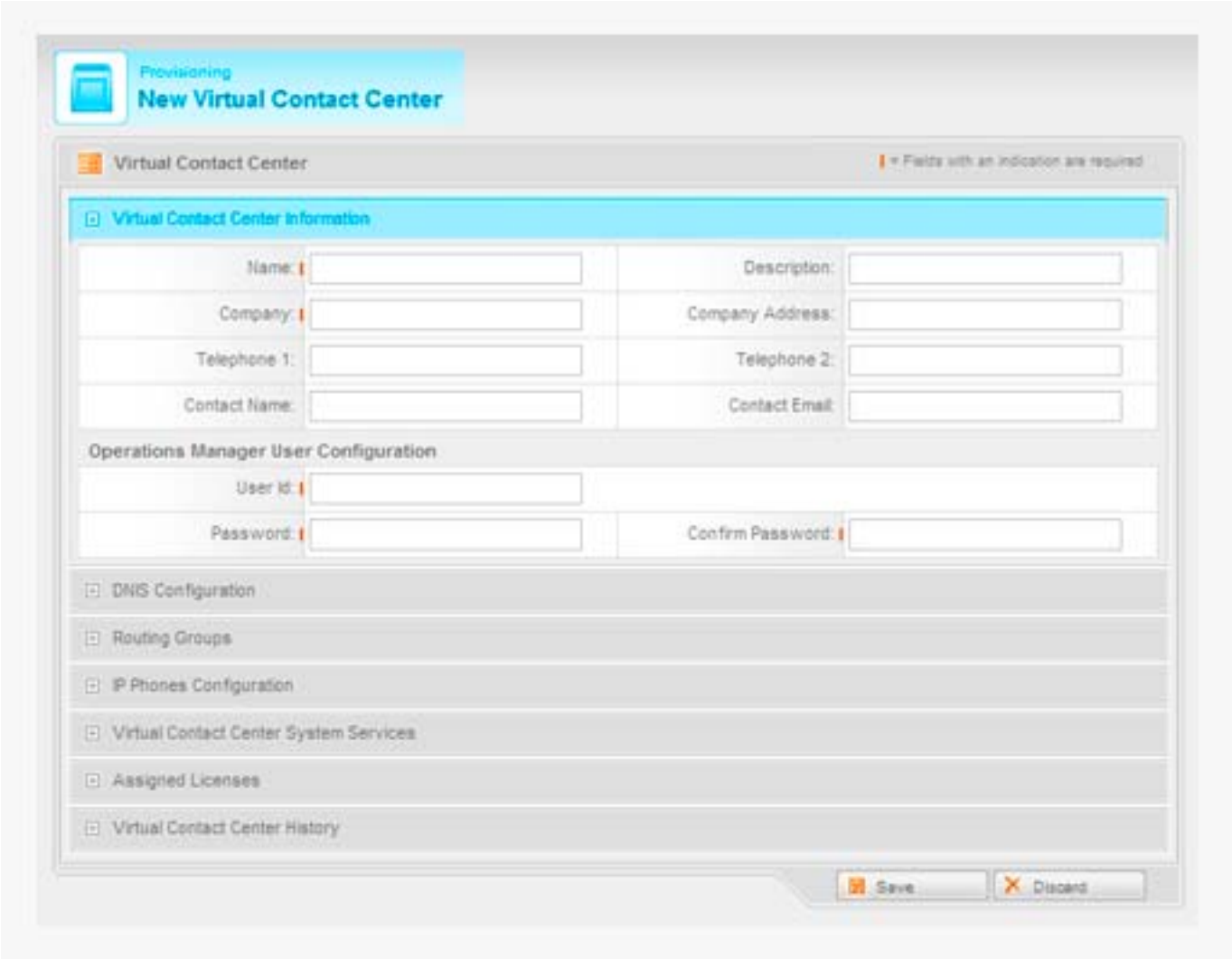
In the “New Virtual Contact Center” menu we will find the following tabs:

- Virtual Contact Center information
- DNIS Configuration
- Routing Groups
- IP Phones Configuration
- Virtual Contact Center System Services
- Assigned Licenses
- Virtual Contact Center History


allegro
Provisioning
Administration
Outbound Engine
Live Monitoring
Resources
Hosts
Carriers
System Services
IP Trunks
Digital Trunks
DNISs
IP Phones
Routing Groups
Hosting
Virtual Contact Centers
Locations
Countries
Areas
Time Zones
History
All Histories
Virtual Contact Centers
Filter:
Default
Name:
Description:
Company:
Contact Name:
Contact Email:
Refresh
Clear
Name
Description
Company
Contact Name
Contact Email
Beer Inc.
Beer Inc VCC
Coke
Coke VCC
InforDB
InforDB VCC
MasterCredit
MasterCredit VCC
MasterSelling
MasterSelling VCC
Support Masters
Support Masters VCC
New VCC

Virtual Contact Center Information

This menu contains 11 fields that can be configured by the administrator.



- **Name:** indicates the name of the VCC to be created. For example: MyVCC. This field is mandatory.
- **Company**: Indicates the name of the company hiring the VCC service. For example CoffeeMachine INC. This field is mandatory
- **Description:** may contain a brief description for the VCC. For example: “promotional campaign A”. This field is not mandatory
- **Telephone 1 and Telephone 2:** Company’s telephone numbers. These fields are not mandatory.

- **Contact Name:** Name of the person in the client company who's in charge of communications with the Contact Center Services provider. This field is not mandatory.
- **Contact E-mail:** e-mail address of the person in the company who's in charge of communications with InConcert. This field is not mandatory.

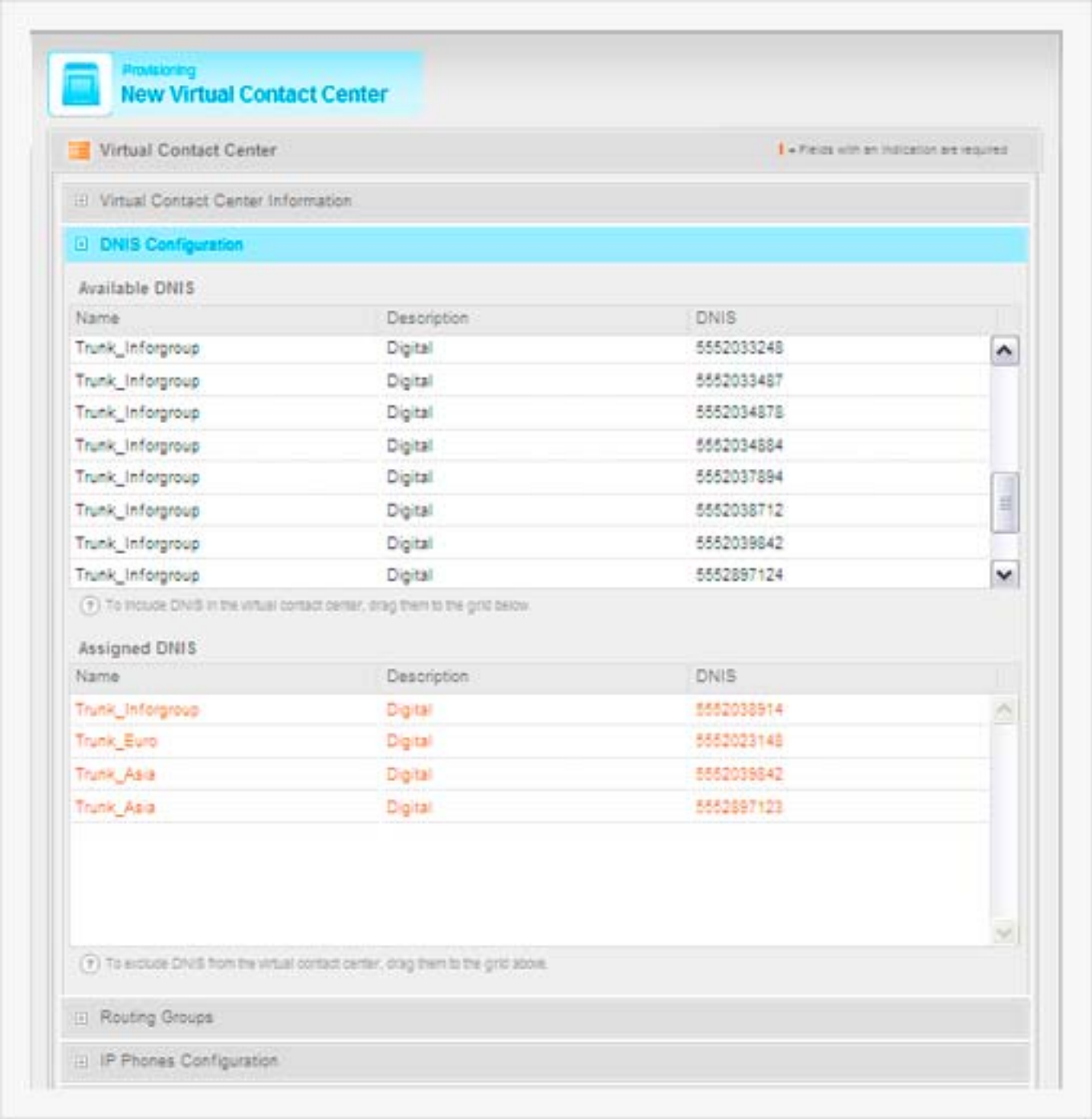
Below this panel, there's another panel: "Operations Manager User Configuration". The administrator needs to create a user for the Operations Manager of the VCC.

The fields in this panel are:

- **User ID:** provides the login name for the Operations Manager. For example: MJackson
- **Password:** is the password for the login screen
- **Confirm Password:** the administrator needs to retype the keyword

All the fields in this panel are mandatory.

DNIS Configuration



The panel for DNIS configuration is composed by two lists:

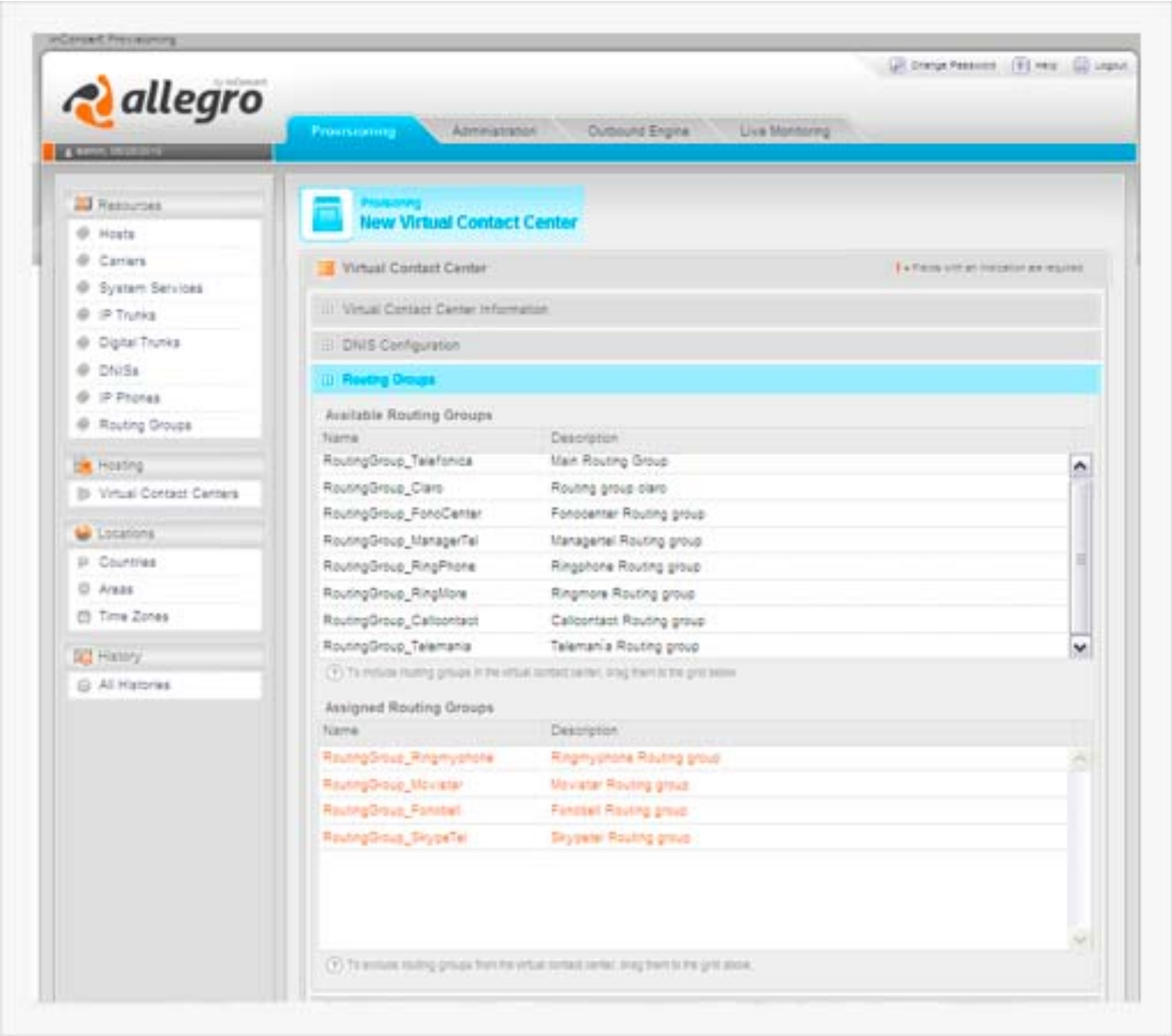
- List of Available DNIS

- List of Assigned DNIS

In order to assign a DNIS, the service needs to be correctly configured in the “Resources” menu.

Once a DNIS service is assigned to a VCC, the same DNIS service becomes unavailable for other VCCs.

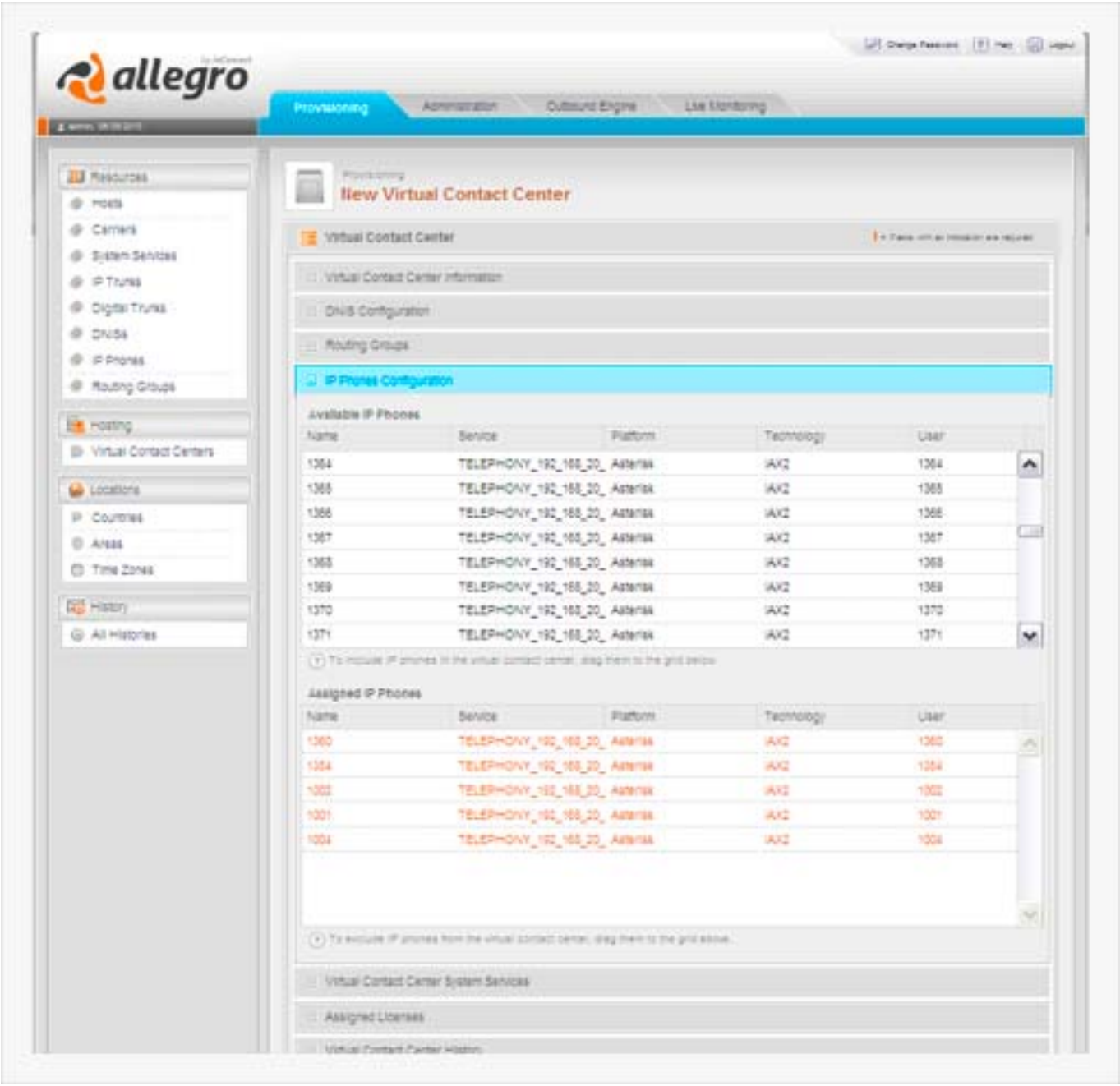
Routing Groups



The routing groups that were configured in the “Resources” menu, will appear in the lists of Available or Assigned Routing groups, depending on whether they were assigned to a VCC or not.

If you need a special Routing Group for the set-up of a particular VCC and it's not in the list, save your changes in the "Hosting" menu, and return to the "Resources" menu to configure the new Routing Group.

IP Phones Configuration

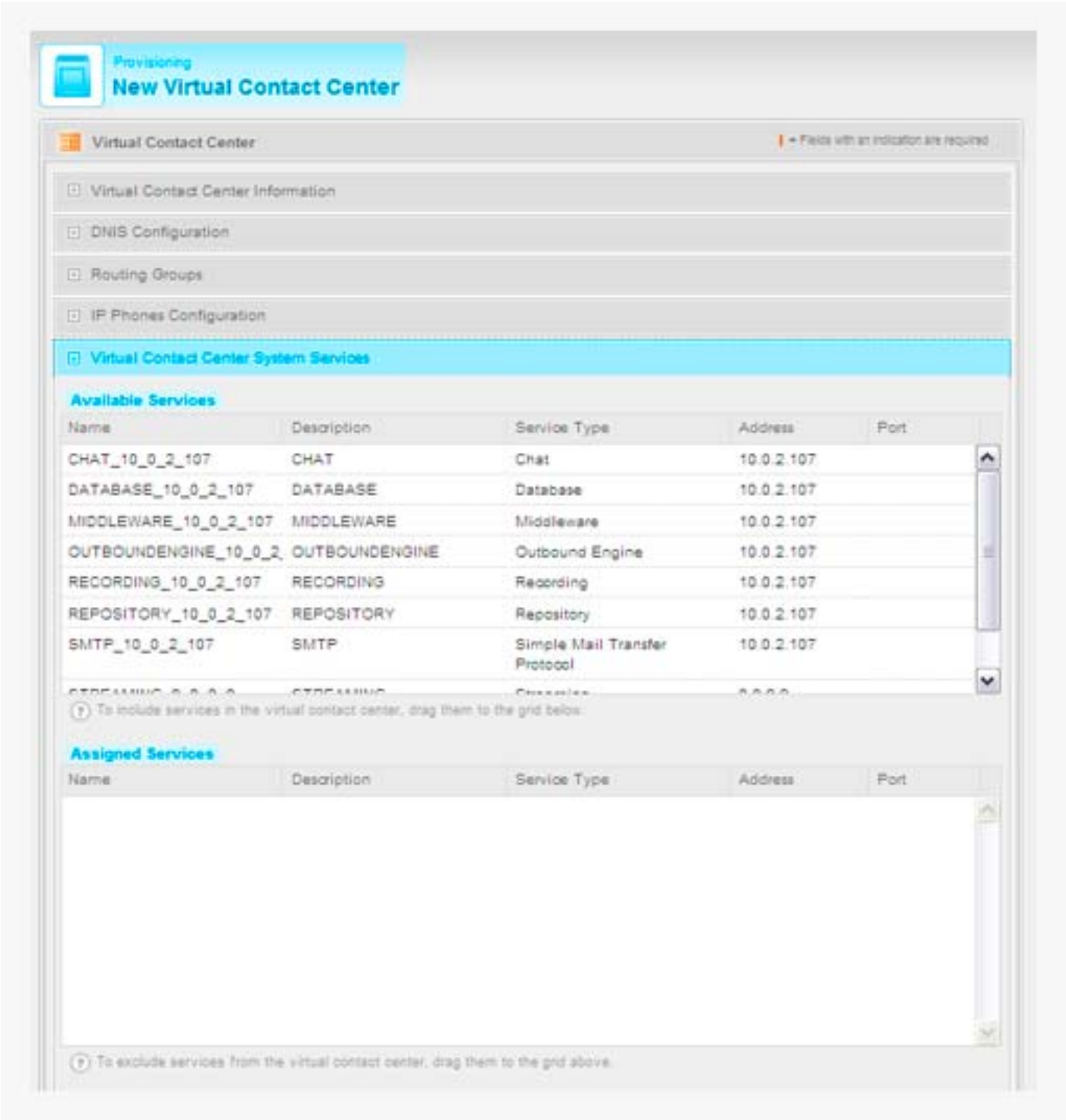


The IP Phones that were configured in the “Resources” menu, will appear in the lists of Available or Assigned IP Phones, depending on whether they were assigned to a VCC or not.

If you need more IP Phones for the set-up of a particular VCC, save your changes in the “Hosting” menu, and return to the “Resources” menu to configure the new IP Phones.

This step will be limited by the number of IP phones available by contract.

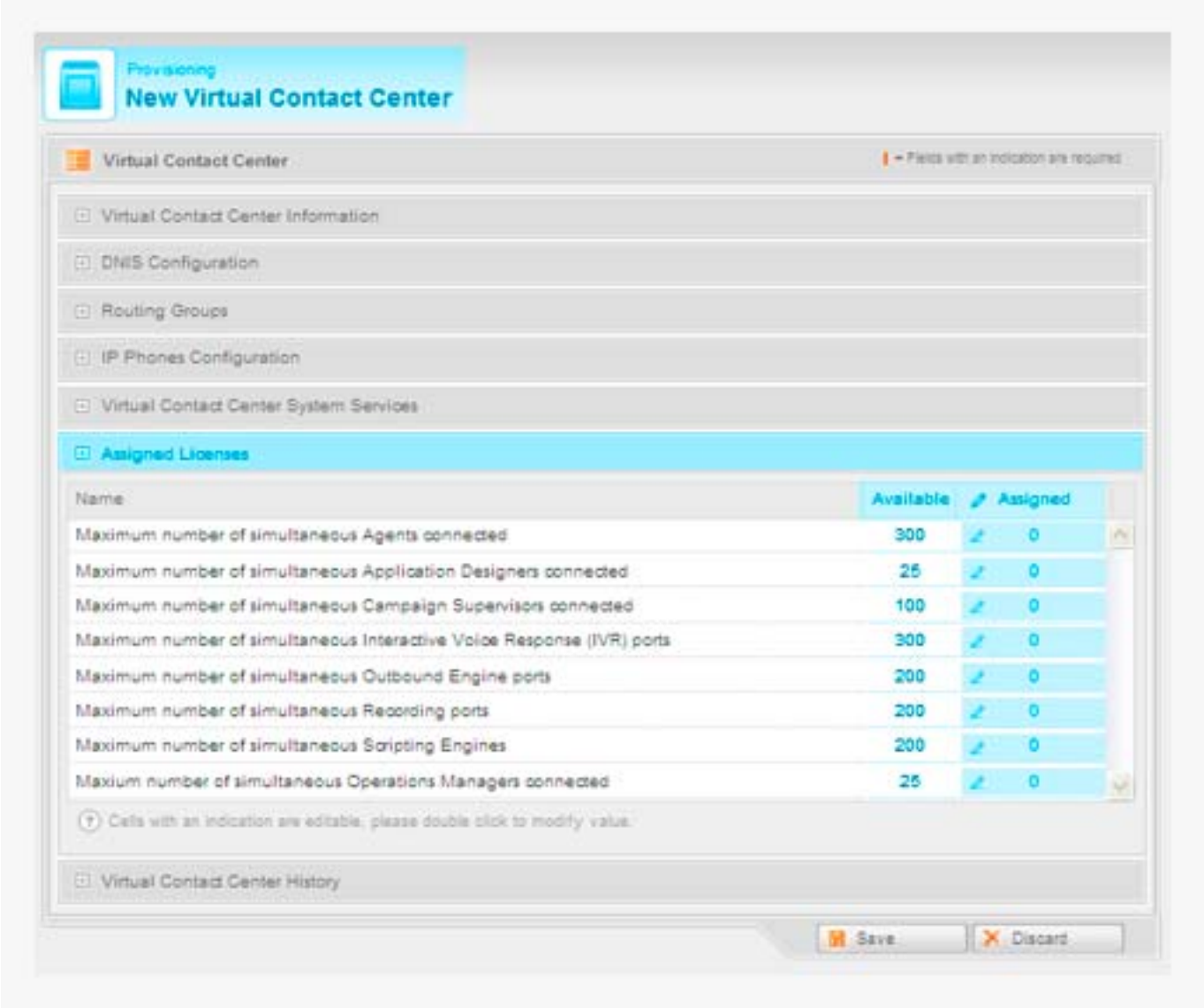
Virtual Contact Center System Services



At this stage, the administrator will choose which services will be available for each VCC. In this case, it is not necessary to add all the services to all the VCCs.

For example: if Freezing Flames Inc. wants to install a VCC to receive complaints from clients, then they won't need to perform outbound calls, and so their VCC won't need to use the Outbound Engine service.

Assigned Licenses



In this screen the administrator will assign the licenses for each VCC.

The number of available licenses depends on two factors:

- Number of licenses hired by the administrator of all the VCCs
- Number of already assigned licenses.

To assign licenses, double click on the number in the column “Assigned” and type in the number of each license to be assigned to any given VCC. The number of available licenses will decrease by the amount of assigned licenses in each field.

Example:

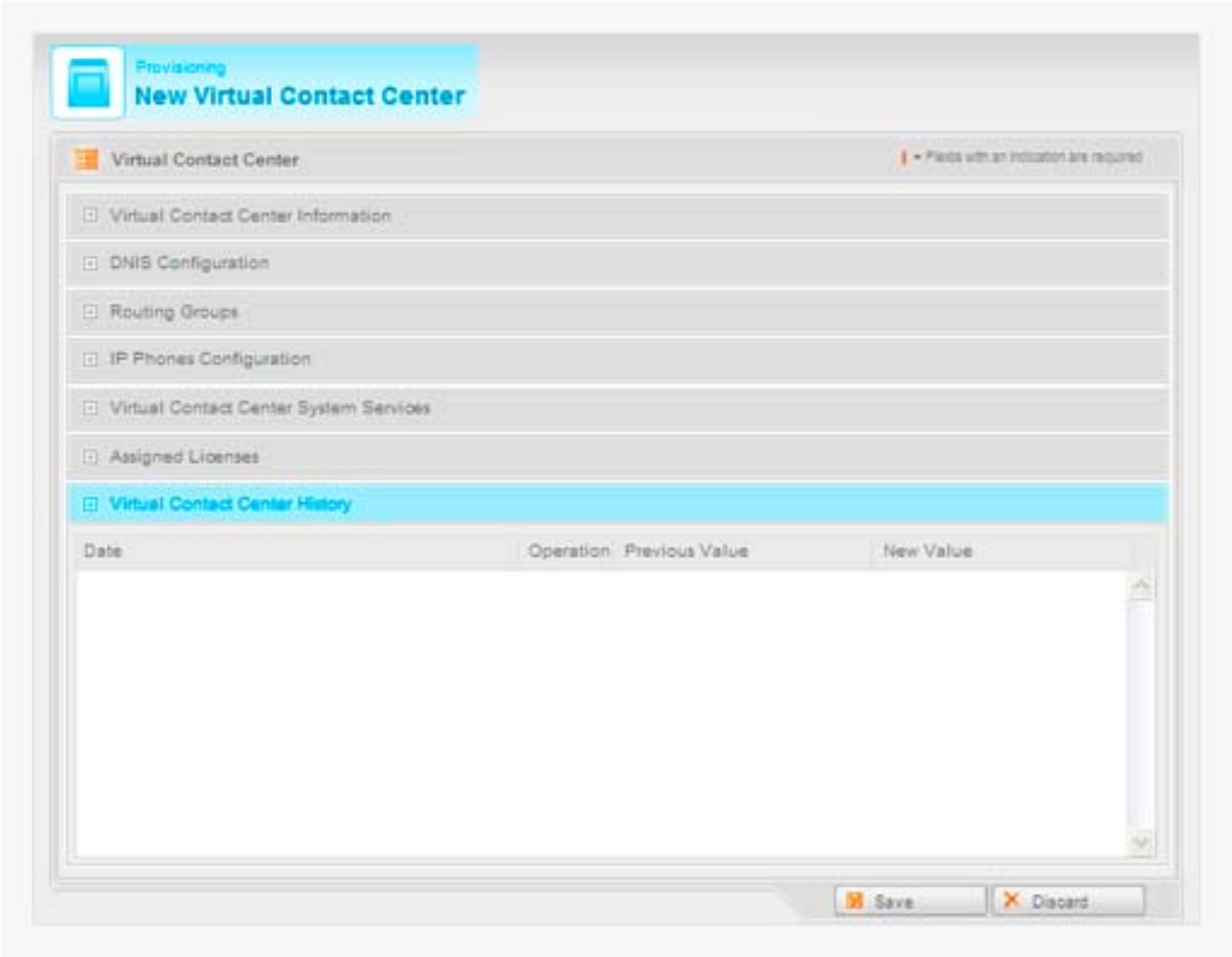
The initial available number of licenses for “Maximum Number of simultaneous Agents connected” is 300.

The administrator assigns 50 licenses to the Freezing Flames Inc. VCC.

After this operation, the number of available licenses for “Maximum Number of simultaneous Agents connected” is 250.

In this step, the relationship between the number of VCCs hosted in a given server and the size of those VCCs appears clear. The number of hosted VCCs will depend on the resource capacity of the host as well as on the requirements of each VCC for licenses.

Virtual Contact Center History



The “Virtual Contact Center History” shows a list of changes to the VCC configuration.

For each change it shows:

- The date in which it took place
- What was the operation that changed
- Which was the state prior to the change
- The new state after the change

IMPORNANT NOTE

In all the fields seen the administrator can click the “Save” button at any time to save the changes. If you click “Discard”, whichever changes you introduced to the configuration after the last save will be lost.

Locations Menu

In the "Locations" menu we'll find several options for the set-up of the different VCCs. Since several VCCs can be operational at the same time in different countries, this is an important step for the administrator.

In this menu we'll find three sub-menus:

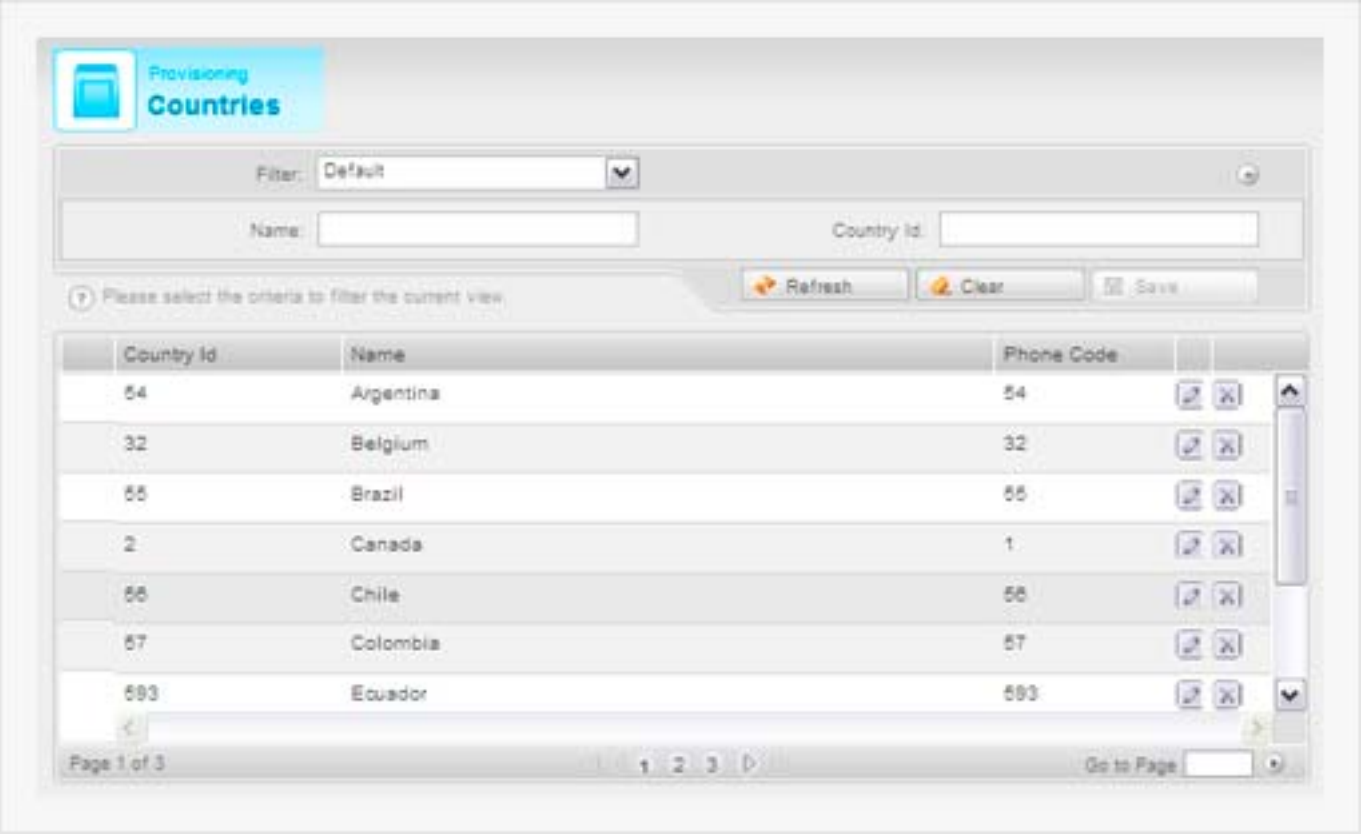
- Countries
- Areas
- Time zones

This configuration is of the utmost importance because it will allow pertinent communication processes.

The country and area configurations allow number recognition as well as they serve the purpose of outbound calls, directing them to the right country and area code.

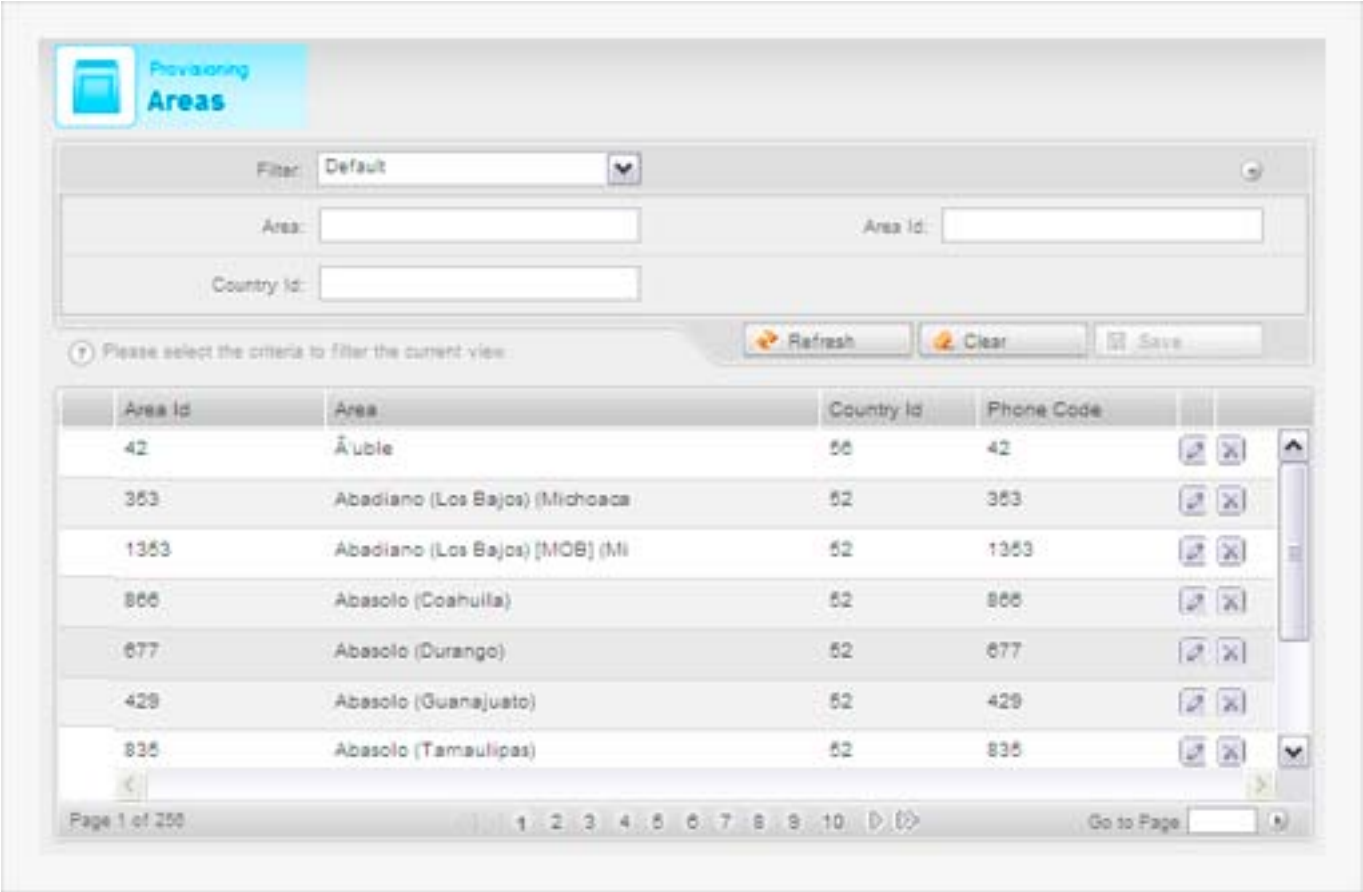
Also, the definition of different Time Zones allows the system and its operators (whether they are agents, supervisor or working under any other capacity) to carry out the different campaigns during the appropriate time window.

Countries



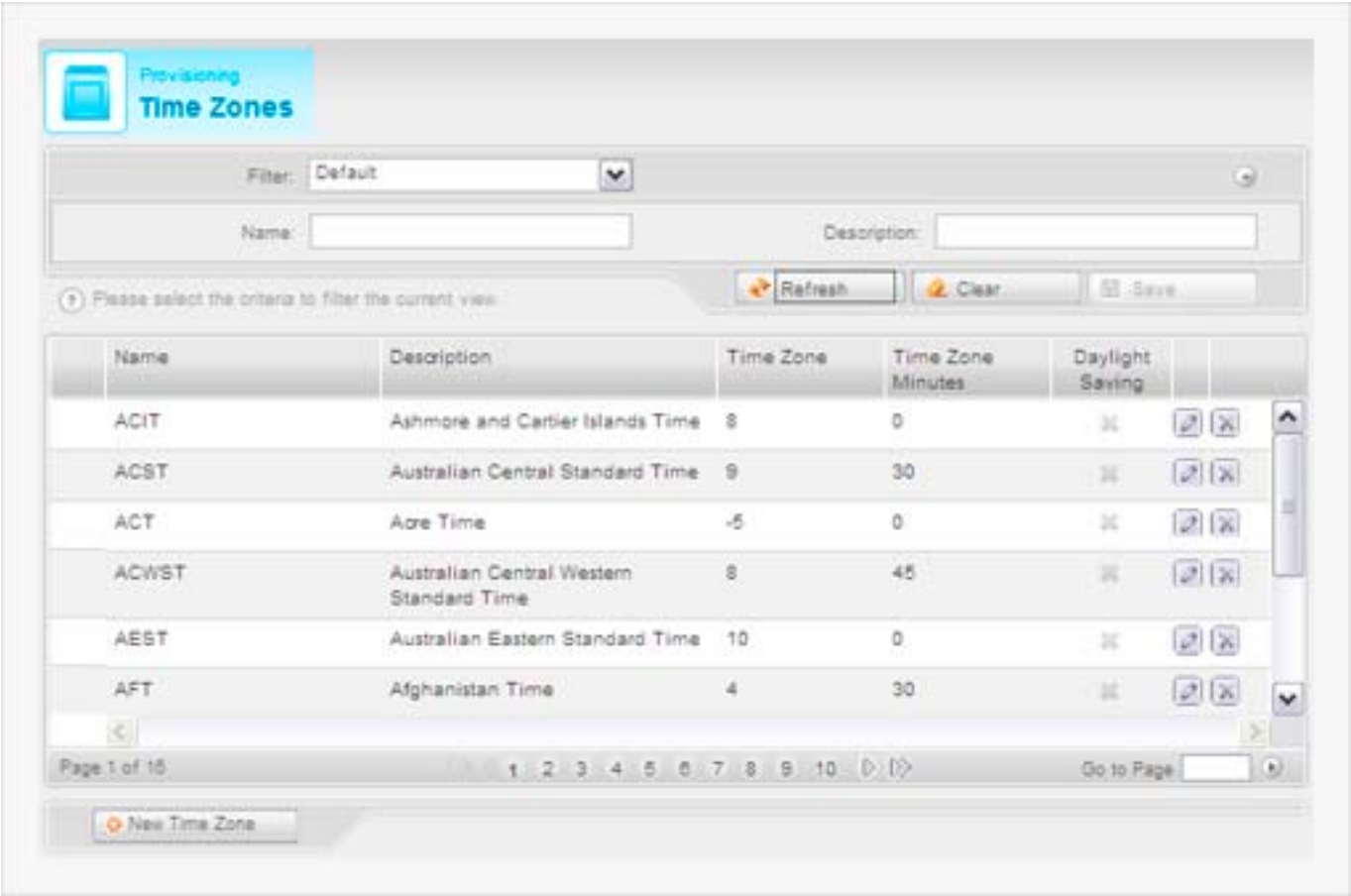
Shows a list of all the available countries in which the VCC can operate.

Areas



In this section the administrator will see the area for which the VCC will be operational.

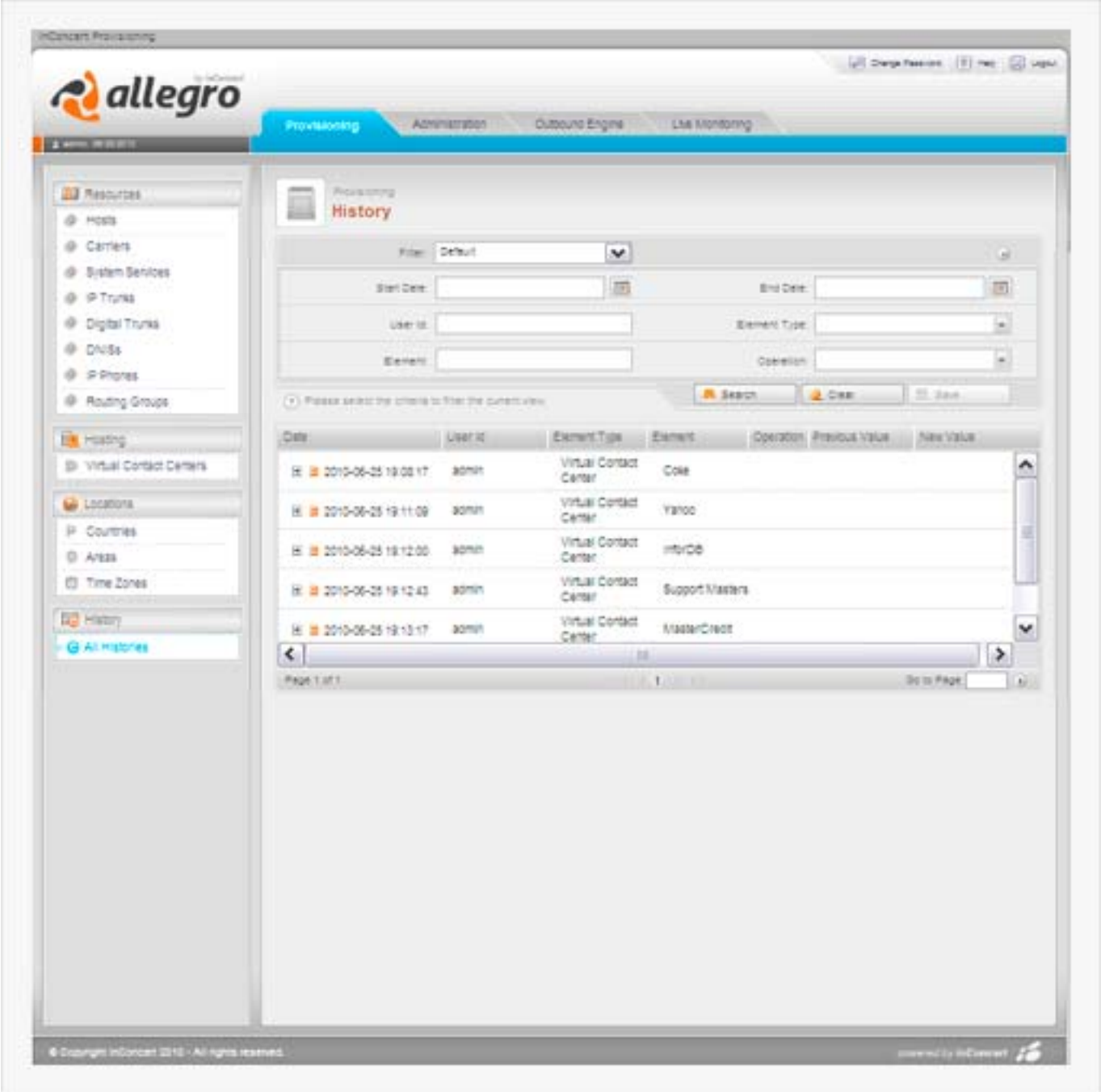
Time Zones



List of all the Time Zones for which a VCC can be operational.

History Menu

In the “History” menu, the administrator can see the changes introduced to all the VCCs.



In this case, the history shows the following data:

- **Date:** day and time in which the change was introduced
- **User ID:** who introduced the change
- **Element Type:**typology of what was changed
- **Element:** Name of what was changed
- **Operation:** which procedure was carried out
- **Previous Value**: state of the variable prior to the change
- **New Value**: state of the variable after the change was introduced

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