# CONTENTS

1 **UNIFIED CONTACT CENTER MANAGEMENT PORTAL OVERVIEW** ................................................................. 12  
   Operational Overview ................................................................................................................................. 12  

2 **WEB SERVER** .................................................................................................................. 14  
   Import a Tenant from the ICM ................................................................................................................ 14  
   How does it work? ................................................................................................................................. 14  
   Portal Users .............................................................................................................................................. 14  
   Host Administrator First Steps ........................................................................................................... 15  
   Configuring Imported Resource Data ................................................................................................. 15  
   Creating a Tenant Administrator ......................................................................................................... 16  
   Assigning Administrator Privileges .................................................................................................. 17  

3 **SYSTEM PROVISIONING** .................................................................................................... 18  
   Security Management .......................................................................................................................... 18  
   System Management .......................................................................................................................... 18  

4 **PROVISIONING COMPONENT MONITORING** ......................................................... 19  
   Performance Counters ........................................................................................................................ 20  
   Event Log Alarms ............................................................................................................................... 21  

5 **SNMP CONFIGURATION** ...................................................................................................... 22  
   Stage 1 - Configure the Provisioning component alarm generator ............................................. 22  
   Stage 2 - Add alarms to the Windows event log ............................................................................ 22  
   Stage 3 - Setup the Windows SNMP service .................................................................................... 22  
   Provisioning Component Alarms Reference ................................................................................... 23  
   Provisioning Component Alarm Service has Started ................................................................. 23  
   Provisioning Component Alarm Service has Stopped .................................................................. 23  
   Provisioning Component Customer Script is Online ..................................................................... 23  
   Provisioning Component Customer Script is Offline ..................................................................... 24  
   Provisioning Component Failed Transactions ............................................................................... 24  
   Provisioning Component Timed Out Transactions ........................................................................ 25  
   Provisioning Component Rejected Transactions .......................................................................... 25
Trap Guidelines........................................................................................................26

6 AUDIT TRAILS ..........................................................................................28
Audit Histories ..................................................................................................28
Audit Data Report ..........................................................................................28

7 Bulk Upload .............................................................................................30
Member Attributes ......................................................................................30
Editing CSV files ........................................................................................30
Template Guide ............................................................................................30
  Global Template Columns ..........................................................................30
  Agent Template .......................................................................................32
  Folders Template ....................................................................................33
  Agent Desktop Template .........................................................................33
  Agent Team Template .............................................................................34
  Enterprise Skill Group Template .............................................................34
  Skill Group Template ..............................................................................34
  User Variable Template ..........................................................................35
Using the Bulk Upload Tool ........................................................................35
  Data Types ..............................................................................................36
  Agent Security Field Example .................................................................36
  Reasons for Upload Failure ....................................................................37

8 INDEX ........................................................................................................38
Preface

Purpose
This document explains how to administrate and provision the Unified Contact Center Management Portal platform.

Audience
This document is intended for all users of the Unified Contact Center Management Portal, from high-level administrators to team supervisors. The reader needs no technical understanding beyond a basic knowledge of how to use computers.

Organization
Chapter 1, “Unified Contact Center Management Portal Overview”
Provides information on the components that make up the Unified Contact Center Management Portal and the configuration that needs to be done for each.

Chapter 2, “Web Server”
Explains how to set up the essential users and equipment within the Web Server so that tenant users can use it to view reports and perform administrative tasks upon their own resources, such as importing data from an ICM into a tenant folder.

Chapter 3, “System Provisioning”
Introduces system security and system management and explains where to find further information.

Chapter 4, “Provisioning Component Monitoring”
Explains how to use the Provisioning component monitoring web site for the Unified Contact Center Management Portal Provisioning component. This allows support agents to monitor busy times, capacity statistics, event logs and so on, and provides access to audit reporting for the Unified Contact Center Management Portal.

Chapter 5, “SNMP Configuration”
Explains how to set up SNMP traps for the Unified Contact Center Management Portal Provisioning component, and describes the traps that it raises.

Chapter 6, “Audit Trails”
Describes the audit histories of individual items and the audit report used to measure actions taken upon entities in the Unified Contact Center Management Portal.

Chapter 7, “Bulk Upload”
This chapter details the process required to bulk upload dimension data into the Unified Contact Center Management Portal, the
templates used to do so and details on how to understand any upload failure.

Obtaining Documentation
Cisco documentation and additional literature are available on Cisco.com. Cisco also provides several ways to obtain technical assistance and other technical resources. These sections explain how to obtain technical information from Cisco Systems.

Cisco.com
You can access the most current Cisco documentation at this URL:
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Cisco documentation and additional literature are available in the Product Documentation DVD package, which may have shipped with your product. The Product Documentation DVD is updated regularly and may be more current than printed documentation.

The Product Documentation DVD is a comprehensive library of technical product documentation on portable media. The DVD enables you to access multiple versions of hardware and software installation, configuration, and command guides for Cisco products and to view technical documentation in HTML. With the DVD, you have access to the same documentation that is found on the Cisco website without being connected to the Internet. Certain products also have .pdf versions of the documentation available.

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An emergency is either a condition in which a system is under active attack or a condition for which a severe and urgent security
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- Nonemergencies — psirt@cisco.com

In an emergency, you can also reach PSIRT by telephone:

- 1 877 228-7302
- 1 408 525-6532

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Never use a revoked or an expired encryption key. The correct public key to use in your correspondence with PSIRT is the one linked in the Contact Summary section of the Security Vulnerability Policy page at this URL: http://www.cisco.com/en/US/products/products_security_vulnerability_policy.html

The link on this page has the current PGP key ID in use.

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### Cisco Technical Support & Documentation Website

The Cisco Technical Support & Documentation website provides online documents and tools for troubleshooting and resolving technical issues with Cisco products and technologies. The website is available 24 hours a day, at this URL:

http://www.cisco.com/techsupport

Access to all tools on the Cisco Technical Support & Documentation website requires a Cisco.com user ID and password. If you have a valid service contract but do not have a user ID or password, you can register at this URL:


Use the Cisco Product Identification (CPI) tool to locate your product serial number before submitting a web or phone request for service. You can access the CPI tool from the Cisco Technical Support & Documentation website by clicking the Tools & Resources link under Documentation & Tools. Choose Cisco Product Identification Tool from the Alphabetical Index drop-down list, or click the Cisco Product Identification Tool link under Alerts & RMAs. The CPI tool offers three search options: by product ID or model name; by tree view; or for certain products, by copying and pasting show command output. Search results show an illustration of your product with the serial number label location.
highlighted. Locate the serial number label on your product and record the information before placing a service call.

Submitting a Service Request

Using the online TAC Service Request Tool is the fastest way to open S3 and S4 service requests. (S3 and S4 service requests are those in which your network is minimally impaired or for which you require product information.) After you describe your situation, the TAC Service Request Tool provides recommended solutions. If your issue is not resolved using the recommended resources, your service request is assigned to a Cisco engineer. The TAC Service Request Tool is located at this URL:

http://www.cisco.com/techsupport/servicerequest

For S1 or S2 service requests or if you do not have Internet access, contact the Cisco TAC by telephone. (S1 or S2 service requests are those in which your production network is down or severely degraded.) Cisco engineers are assigned immediately to S1 and S2 service requests to help keep your business operations running smoothly.

To open a service request by telephone, use one of the following numbers:

Asia-Pacific: +61 2 8446 7411 (Australia: 1 800 805 227)
EMEA: +32 2 704 55 55
USA: 1 800 553-2447

For a complete list of Cisco TAC contacts, go to this URL:
http://www.cisco.com/techsupport/contacts

Definitions of Service Request Severity

To ensure that all service requests are reported in a standard format, Cisco has established severity definitions.

Severity 1 (S1)—Your network is “down,” or there is a critical impact to your business operations. You and Cisco will commit all necessary resources around the clock to resolve the situation.

Severity 2 (S2)—Operation of an existing network is severely degraded, or significant aspects of your business operation are negatively affected by inadequate performance of Cisco products. You and Cisco will commit full-time resources during normal business hours to resolve the situation.

Severity 3 (S3)—Operational performance of your network is impaired, but most business operations remain functional. You and Cisco will commit resources during normal business hours to restore service to satisfactory levels.

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- iQ Magazine is the quarterly publication from Cisco Systems designed to help growing companies learn how they can use technology to increase revenue, streamline their business, and expand services. The publication identifies the challenges facing these companies and the technologies to help solve them, using real-world case studies and business strategies to help readers make sound technology investment decisions. You can access iQ Magazine at this URL:
  - http://www.cisco.com/go/iqmagazine
  - or view the digital edition at this URL:
    - http://ciscoiq.texterity.com/ciscoiq/sample/

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- Networking products offered by Cisco Systems, as well as customer support services, can be obtained at this URL:
Networking Professionals Connection is an interactive website for networking professionals to share questions, suggestions, and information about networking products and technologies with Cisco experts and other networking professionals. Join a discussion at this URL:

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1 UNIFIED CONTACT CENTER MANAGEMENT PORTAL OVERVIEW

Operational Overview

The Unified Contact Center Management Portal is a suite of server components that simplify the operations and procedures for performing basic administrative functions such as managing agents and equipment, and provide a common, web-based user interface within the entire Cisco IPCC Hosted and Enterprise Editions product set.

The Unified Contact Center Management Portal consists of six components:

- The **Database** server component, which utilizes an application called the **Importer** to import enterprise data from different data sources into a Microsoft SQL Server 2000 Enterprise Edition management information database. The database consists of separate database elements that sit on top of SQL Server and which provide data to different reporting elements:
  - The **RDBMS Database** (known as the *Datamart*) holds the imported enterprise data
  - The **Reporting Services Database** imports and processes data from the datamart so that SQL Server Reporting Services can use it to populate reports

- The **Reporting Extensions** server component holds the report templates used to run audit reports and retrieves the data from the reporting services database to populate reports with

- The **Application** server component manages security and failover. It manages security by ensuring that users can only view specific folders and folder content as defined by their security login credentials. It verifies that a user is valid and then loads the system configuration that applies to that user. It also manages failover so if one database server fails, the application can automatically retrieve the required data via an alternative database server

- The **Web** server component provides a user interface to the platform that allows users to interact with report data, as well as performing administrative functions

- The **Provisioning** server component and its various connectors enable it to communicate with network equipment to assist in the making of intelligent call routing decisions. It communicates with back office databases and systems to extract information for routing and reporting purposes
- The **Data Import** server component is an Extract, Transform and Load (ETL) server for data warehouses. The Data Import component imports the data used to build reports. It is designed to handle high volume data (*facts*) such as call detail records as well as data that is rarely changed (*dimensions*) such as agents, peripherals and skill groups.

If these components are installed on more than one machine, the Data Import, Database and Provisioning components are normally installed on the Database Server. The Reporting Extensions, Application and Web components are usually installed on the Web Application Server.
2 WEB SERVER

The Unified Contact Center Management Portal web component is a browser-based management application designed for use by contact center/system administrators, business users and supervisors. The host administrator does not administrate the web component server on a day-to-day basis, but must set up a tenant administrator user to do so, and a tenant folder in which to put all the tenant’s resources.

Further information on the web server is available from the User Manual for Unified Contact Center Management Portal Release 7.2.

Import a Tenant from the ICM

All tenant data in the Unified Contact Center Management Portal platform is derived from imported customer definition data on the ICM. All changes to the customer (tenant) data are performed using Cisco’s Configuration Manager.

How does it work?

The Unified Contact Center Management Portal maintains a complete data model of the contact center equipment to which it is connected and periodically synchronized. In addition to configuration information, for example agents or skill-groups, the Unified Contact Center Management Portal can optionally record the events logged by the equipment, such as call records for management information and reporting purposes. The Unified Contact Center Management Portal data model and synchronization activity allows for items to be provisioned either through the Unified Contact Center Management Portal's Web interface or from the standard equipment specific user interfaces.

Portal Users

In regards to the Web component server there are typically a small number of different user types:

- The host administrator is responsible for the whole platform and therefore has a view across all the equipment and resources
- The tenant administrator is responsible for the slice of the system assigned to the tenant by the host administrator
- The tenant user has access only to the resources and tools assigned by the tenant administrator. Several sub-classes of tenant user may be created by the tenant administrator using user groups and roles to achieve their business requirements, for example one type of user may be able to add information notices

On a new system the host and tenant administrators perform their respective tasks before the tenant user is given access to the system. These tasks are detailed below.
Host Administrator First Steps

The Host administrator is responsible for:

- Creating a tenant
- Ensuring that the tenant equipment (peripherals) are correctly located in the tenant folder
- Creating an administrator user for each tenant
- Adding them to the administrators group for the tenant and assigning any specific roles

**Note** To map a prefix to a tenant for the importing of ICM data, the user must have **host administrator** privileges.

Configuring Imported Resource Data

After the initial data import, resources imported from CallManagers associated with specific tenants will be stored in those tenant folders. Where multiple tenants share a CallManager, resources will be put in the Unallocated folder and the administrator must place these in the appropriate folder. Resources associated with more than one tenant, such as phone types and button templates, should be placed in a subfolder of the Shared folder that should be set to be readable only by users from those tenants. More information on how to manage security in the Management Portal can be found in the **User Manual for Cisco Unified Contact Center Management Portal Release 7.2**.

**Caution:** Resources may **not** be moved out of tenant folders

Prefixes can be used to search through items in the Unallocated folder and identify the specific items to be moved into a selected tenant folder.

**Note**

- You can only map a prefix to a tenant folder
- Any single item moved to a folder is excluded from the prefix management import job to prevent it from being automatically moved by the system

To **view** the prefixes in the system that apply to tenant folder data:

1. Click **Tools**. The **Tools** page is displayed
2. Click **System Manager**. The **System Manager** page is displayed
3. From the **Filter** drop down list select **Tenant**. The page refreshes and the tenant folders in the system are displayed as a list
4. Click the properties icon displayed next to the prefix name. To the right of the screen the **Update the details for the selected tenant folder** section is displayed
5. Click the **View Prefixes...** link. The prefixes associated with the selected tenant are displayed as a list

To **create** a prefix (add a prefix to a system folder), click the **Create Prefix** button. The **Create a Prefix** page is displayed. Perform the following:
1. In the **Prefix** field enter the prefix
2. From the **Type** drop down list, select the system resource type to which the prefix is to be applied
3. In the **Priority** field enter a unique numerical value (0 - 9999)
4. Click **OK**

To **edit** a prefix, click the properties icon displayed next to the prefix name. To the right of the screen the **Update the details for the selected tenant** section is displayed.

1. You may only modify the name entered in the **Prefix** field
2. Click **OK**

**Note** Once a prefix has been created, its type cannot be changed.

To **assign** a priority to a prefix, use the up or down buttons displayed next to the prefix name. The higher the prefix is in the list, the more relevant and useful it is to your data.

To **delete** a prefix, select the tenant folder in the tree whose associated prefixes you wish to view. The prefixes associated with the selected folder are listed.

Click the red cross displayed next to the prefix you want to delete.

### Creating a Tenant Administrator

1. Click on the **Tools** link at the top right of the web page to display the **Tools** page
2. Click on **Security Manager**, and the **Security Manager** page is displayed
3. Click on the **Users** tab to the top left to access the **User Browser** page.
4. Select the tenant folder and click **New**
5. Fill in the following fields:
   - In the **User Name** field enter the name as it will appear in the system for the new user
   - In the **Password** field enter the password for the new user
   - In the **Confirm Password** field re-enter the selected password
   - In the **First Name** and **Last Name** fields enter the user's details
   - In the **Email** field enter the email address of the new user
   - In the **Description** field enter any explanatory text, if required
6. Select the **Advanced Mode** checkbox and any of the following checkboxes if applicable:
   - The **Enabled** checkbox to ensure that the user is live in the system. If unchecked the new user is saved in the system but cannot access it
- The **User must change password at next Logon** checkbox to prompt the new user to change their password after their first login
- The **Password Never Expires** checkbox to assign the password to the new user indefinitely
- The **User cannot change password** checkbox to prevent the new user from being able to change their password

**Note** Only the User Name, Password and Confirm Password fields are required.

7. Click **OK**. You are returned to the **User Browser** page

**Assigning Administrator Privileges**

Now you must give the tenant administrator the permissions necessary to manage the system. This is done by assigning the new user to the administration group that was automatically created when you created the tenant.

1. Click on the properties icon for the administrator user to display the **Edit User** page
2. Click on the **Groups** tab to show the available groups

**Note** All users created are automatically assigned to the group <tenant> Users.

3. Select the group <tenant> Administrators. The user’s permissions are automatically updated so that they can manage users, folders, information notices and folder security within the tenant folder
3 SYSTEM PROVISIONING

All system and security management for the Management Portal is performed through the web interface. For further information on how to use the web interface, please see the accompanying User Manual for Unified Contact Center Management Portal Release 7.2. Most system and security management after the initial setup is performed by individual tenant administrators.

Security Management

Security Management can be thought of as the process of determining which users can perform which actions in which folders. This involves creating and managing the following entities:

- **Folders** The security system used by the Management Portal is folder based. This means that the folder hierarchy should ideally be designed with security requirements in mind.

- **Users and Groups** Users can be assigned to groups of users with the same security permissions. A number of predefined groups with commonly required permissions are provided. For example, all users within a tenant are automatically assigned to a tenant users group that gives them read-only permissions on resources within that tenant.

- **Roles and Tasks** The actions that can be performed within a folder. Each task is an individual kind of action, such as browsing resources or managing information notices. These tasks are collected together into roles. For example, you could create an Auditor role that included the ability to manage audit reports, browse audit reports, and browse resources, and then assign individual users the ability to perform that role within certain folders.

**Note** For each role a user or group is assigned, they must also be assigned an equivalent global role. Removing a global role removes that user’s ability to perform the corresponding non-global roles anywhere within the system, meaning it is possible to remove permissions in a single click rather than removing permissions from folders individually. Security is explained in more detail in the Security Management chapter of the User Manual.

System Management

The System Manager tool allows the user to create and manage resources and resource folders within a hierarchical folder structure. Users with sufficient security privileges can access and manage the entire contents of the system via the System Manager interface. This lets you remotely configure and administer key aspects of your IPCC system.
4 PROVISIONING COMPONENT MONITORING

Note In some circumstances the Provisioning server component is referred to as the Gateway.

The Provisioning server component has monitoring tools to track real time and historical customer activity. One such tool is the Web monitoring site. It is the most popular method for tracking customer activity as it can be easily accessed from the support Agents’ desktop.

To access the Web monitoring site, open Internet Explorer on the machine that is hosting the Provisioning component and enter the following address: http://localhost/monitor.

Once the web site is displayed, a user can start or stop a web monitoring script activity on a given processor, by clicking the Start or Stop hyperlinks in the Action column.

Customer information is displayed in the following columns:

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Processor</td>
<td>Displays the computers configured to be monitored.</td>
</tr>
<tr>
<td>State</td>
<td>The color displayed indicates whether the script being monitored is Active (green), going online or being taken offline (amber) or Inactive (red).</td>
</tr>
<tr>
<td>Transactions</td>
<td>Total number of requests for this script.</td>
</tr>
<tr>
<td>Errors</td>
<td>Total number of errors for this script.</td>
</tr>
<tr>
<td>Filtered</td>
<td>Number of errors filtered out of the script.</td>
</tr>
<tr>
<td>Outstanding</td>
<td>Number of requests being processed at that time.</td>
</tr>
<tr>
<td>Restart</td>
<td>The total amount of time required to restart the system.</td>
</tr>
<tr>
<td>Oneshot</td>
<td>Displays whether the oneshot function is enabled or not.</td>
</tr>
<tr>
<td>Enabled Period</td>
<td>The total time since the script has been active.</td>
</tr>
</tbody>
</table>

Note The web page automatically refreshes every few seconds.
Performance Counters

The Unified Contact Center Management Provisioning component integrates with Windows performance counters (accessed by running the `perfmon` command) to provide real-time activity monitoring. Perfmon can also connect to remote computers, if necessary.

The Unified Contact Center Management Provisioning component appears as a separate Data Gateway object in perfmon. The performance counters available for the Data Gateway object are:

<table>
<thead>
<tr>
<th>COUNTER</th>
<th>MONITORS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call Error Rate</td>
<td>Number of errors (excluding timeouts) per second.</td>
</tr>
<tr>
<td>Call Reject Rate</td>
<td>Requests rejected per second (a request is rejected when there is no script available to process it).</td>
</tr>
<tr>
<td>Call Request Rate</td>
<td>Requests processed per second (a request is counted as processed once its reply is sent).</td>
</tr>
<tr>
<td>Call Timeout Rate</td>
<td>Requests timed out because no response was received by the customer data system.</td>
</tr>
<tr>
<td>Outstanding Calls</td>
<td>The number of requests currently being processed (in progress) by the Provisioning component.</td>
</tr>
<tr>
<td>Total Call Errors</td>
<td>Total number of errors accumulated since the Provisioning component service started.</td>
</tr>
<tr>
<td>Total Call Requests</td>
<td>Total number of requests processed since the Provisioning component service started.</td>
</tr>
<tr>
<td>Total Call Timeouts</td>
<td>Total number of requests timed out since the Provisioning component service started.</td>
</tr>
<tr>
<td>Total Calls Rejected</td>
<td>Total number of requests rejected since the Provisioning component service started.</td>
</tr>
<tr>
<td>Total Processor Starts</td>
<td>Total number of customer scripts that have been started since the Provisioning component service started.</td>
</tr>
<tr>
<td>Total Processor Stops</td>
<td>Total number of customer scripts that have been stopped since the Provisioning component service started.</td>
</tr>
</tbody>
</table>

The perfmon graph can combine many different performance counters. Furthermore, perfmon can be configured to trace specific counters at scheduled times of the day. These performance logs can then be exported to Excel for further analysis.

For information on how to use and configure perfmon, see the Microsoft documentation on Performance Logs and Alerts.
Event Log Alarms

The alarm generator monitors activity in the Provisioning component and writes entries to the event log. The events include provisioning scripts starting and stopping and requests failing. Rather than writing an entry every time a request fails, the Provisioning component plugin summarizes every minute. The default reporting period is one minute; however it can be changed in the minute attribute in plugins.xml.

An application called evntwin.exe, which ships as part of Windows, is used to convert the alarms into SNMP traps; see chapter 5.
5 SNMP CONFIGURATION

The Unified Contact Center Management Portal Provisioning component can be configured to produce Simple Network Management Protocol (SNMP) traps. SNMP trapping is a means of monitoring and logging events on the network, such as faults or errors that impact upon the Unified Contact Center Management Portal Provisioning component. SNMP trap configuration is a three stage process.

Stage 1 - Configure the Provisioning component alarm generator

The alarm generator monitors activity in the Unified Contact Center Management Portal Provisioning component and writes events to the event log, including scripts starting, scripts stopping and requests failing.

Stage 2 - Add alarms to the Windows event log

To view an example of an alarm:
1. Click Start > Administrative Tools > Event Viewer. The Event Viewer dialog window is displayed
2. Double click on an alarm in the right-hand pane
3. The Event Properties dialog window is displayed in which the alarm properties are detailed

To add alarms to the Windows event log:
1. Navigate to the Windows folder /evtwin.exe application and run it. This enables events in the Event Log to be translated out as SNMP traps.
2. The events are displayed down the right hand side. Select the required events and add them to the top panel list.
3. If you need to configure trap throttling, click Settings on the main window. In the Settings dialog window, select the Apply Throttle radio button in the Trap Throttle panel.
4. Click OK.

Stage 3 - Setup the Windows SNMP service

1. Click Start > Control Panel > Administrative Tools and then Services. The Services dialog window is displayed.
2. Right click SNMP Service and select Properties from the drop down list. The SNMP Service Properties dialog window is displayed. This allows the trap destination and SNMP community to be configured.
3. In the Community Name field, enter the name of the community.
4. Click **Add**. A pop up dialog window is displayed. Enter the IP address of the Trap destination.

5. Click **OK**.

**Provisioning Component Alarms Reference**

The following sections describe the SNMP traps raised by the Unified Contact Center Management Portal Provisioning component.

**Provisioning Component Alarm Service has Started**

**Meaning**

This message simply indicates that from this point onwards the Provisioning component will log events to the application log.

**Occurrence**

Either the provisioning component service has just been started or the alarms plugin has just been added. The alarms plugin is the subsystem in the Provisioning component service that is responsible for raising alarms and it can be loaded dynamically. This event is rare because the provisioning component service is not regularly restarted and there is no reason to reload the alarm service.

**Provisioning Component Alarm Service has Stopped**

**Meaning**

This message simply indicates that from this point onwards the Provisioning component will no longer log events to the application log.

**Occurrence**

Either the Provisioning component service has just been stopped or the alarms plugin has just been unloaded. The alarms plugin is the subsystem in the Provisioning component service which is responsible for raising alarms and it can be loaded dynamically. This event is rare because the Provisioning component service is not regularly restarted and there is no reason to reload the alarm service.

**Provisioning Component Customer Script is Online**

Provisioning Component customer script %1 is online.

**Meaning**

%1 is replaced by the script name. This event indicates that the specified script has just been brought online.

**Occurrence**

This alarm is raised when a customer configuration script is added or a script is restarted after being taken offline for any reason.
Comment
This is an important alarm to monitor because in most situations it indicates either a recovery from an earlier problem or an attempted recovery. For example, if connectivity is lost to a customer system, then a script may be configured to stop so that a failover script can be used. After a specified period of time, the script is restarted in order to reconnect to the customer system.

Use
The actual script affected is referenced within the event text. Therefore, to use this alarm effectively, the actual text must be scanned in order to discover the script name.

Provisioning Component Customer Script is Offline
Provisioning Component customer script %1 is offline.

Meaning
%1 is replaced by the script name. This event indicates that the specified script has just been taken offline.

Occurrence
This alarm is raised when a script is removed or a script is stopped for any reason.

Comment
This is an important alarm to monitor because in most situations it indicates a problem processing transactions. For example, if connectivity is lost to a customer system, then a script may be configured to stop so that a failover script can be used. After a specified period of time, the script is restarted in order to attempt to reconnect to the system.

Use
The actual script affected is referenced within the event text. Therefore, to use this alarm effectively, the actual text must be scanned in order to discover the script name.

Provisioning Component Failed Transactions
Provisioning Component failed %1 transactions for %2 in the last %3 minute(s).

Meaning
%1 is the number of failed transactions; %2 is the name of the script that relates to the failed transactions; %3 is the period of time over which the failures occurred. It indicates that the specified script is having problems processing transactions.

Occurrence
The specified script has failed a number of transactions for some reason.
Comment
This alarm is likely to be raised shortly before the script is taken offline. The tolerance of a script to errors determines the number of these messages to be received before a script is taken offline.

Use
The actual script affected and number of errors is referenced within the event text. Therefore, to use this alarm effectively, the actual text must be scanned in order to discover this information.

Provisioning Component Timed Out Transactions
Provisioning Component timed out %1 transactions for %2 in the last %3 minute(s).

Meaning
%1 is the number of timed-out transactions; %2 is the name of the script with the timed-out transactions; %3 is the period of time over which the timeouts occurred. It indicates that the specified script is not receiving responses in a reasonable period of time.

Occurrence
The specified script has not received replies from the connected system in a reasonable period of time (defined in the script). It will occur in any situation when no response is received from the customer data system in a timely manner, or an incorrectly formatted reply is received.

Comment
This alarm is likely to be raised shortly before the script is taken offline. The tolerance of a script to errors determines the number of these messages before a script is taken offline.

Use
The actual script affected and number of errors is referenced within the event text. Therefore, to use this alarm effectively, the actual text must be scanned in order to discover this information.

Provisioning Component Rejected Transactions
Provisioning Component rejected %1 transactions for %2 in the last %3 minute(s).

Meaning
%1 is the number of timed-out transactions; %2 is the name of the script with the timed-out transactions; %3 is the period of time over which the timeouts occurred. It indicates that there was not a script available to process the transaction when it arrived at the Provisioning component.
Occurrence
A transaction was received for a non-existent script (unlikely). A transaction was received and the associated script and failover scripts were all offline.

Comment
This alarm is only likely to be raised during periods where the customer system is completely unavailable to the Provisioning Component. That is to say, both normal and failover scripts have failed and been taken offline and have not yet restarted.

Use
Information regarding the actual script affected and so forth is referenced within the event text. Therefore, to use this alarm effectively, the actual text must be scanned in order to discover this information.

Trap Guidelines
The most important alarms are those that check the state of scripts stopping and starting. Different customer systems have different levels of reliability and therefore, the associated scripts are given different levels of error tolerance. Where errors are rare, the tolerance is low or non-existent and the script is stopped as soon as an error is detected.

In this case it is important to detect the script offline event. In the case where the backend system is prone to errors/timeouts then the error tolerance is quite high. It is not that important to pick up the timeout/error events as these are expected, so it is only when the script is offline that truly requires monitoring.

<table>
<thead>
<tr>
<th>MESSAGE</th>
<th>IMPORTANCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provisioning Component alarm service has started</td>
<td>Low - Rarely occurs. Does not indicate a problem.</td>
</tr>
<tr>
<td>Provisioning Component alarm service has stopped</td>
<td>Low - See above.</td>
</tr>
<tr>
<td>Provisioning Component customer script %1 is online</td>
<td>High - Indicates that the Provisioning Component is trying to recover from a problem.</td>
</tr>
<tr>
<td>Provisioning Component customer script %1 is offline</td>
<td>High - indicates that the Provisioning Component has taken action due to too many transaction errors.</td>
</tr>
<tr>
<td>Provisioning Component failed %1 transactions for %2 in the last %3 minute(s)</td>
<td>Medium - useful for checking situation before script restarts, if more information is later required.</td>
</tr>
<tr>
<td>Provisioning Component timed out %1 transactions for %2 in the last %3 minute(s)</td>
<td>Medium - see above.</td>
</tr>
<tr>
<td>Provisioning Component rejected %1 transactions for %2 in the last %3 minute(s)</td>
<td>Medium - see above.</td>
</tr>
</tbody>
</table>
6 AUDIT TRAILS

The Unified Contact Center Management Portal enables provisioning users to view the audit histories of individual items. Users with sufficient privileges can run an audit report on the Unified Contact Center Management Portal platform itself.

These audit trails display events that relate to operations that have been performed within the platform, such as move agent, delete skill group and so forth.

Audit Histories

Each individual resource has its own audit history, showing all the events that have occurred on that resource. This can be accessed from the History tab when examining the resource in the System Manager.

The Edit Filter link allows you to choose to view only those events which were successful, or those events which failed, or to select events that took place between certain dates.

Some events are links; click on these to open up a table showing details of the event.

Finally, by clicking the icon associated with certain events, you can switch to viewing the other item involved.

Audit Reports

Audit reports are viewed from the Reporting tool.

Setting up Audit Reporting

Audit reports are uploaded as part of the installation and commissioning of the Management Portal. Before an audit report can be viewed, however, it is necessary to set up at least one parameter set.

Parameter Sets

Parameter sets determine what data is displayed. For example, a report parameter that is a single tenant will produce a report that displays only data associated with that tenant. Parameter sets should not be confused with report parameters, which are set at the time of viewing the report and determine which parameter set is used and how the report is laid out.

To create a parameter set:

1. Click Reports to open the Reporting tool
2. Click the Parameter Sets option. The Parameter Sets page will be displayed
3. Select a folder. All the parameter sets for the selected folder will be displayed
4. Click on New to display the Create a new parameter set page
5. Select the item type to view from the Item type drop down list
6. Click **Create Parameter Set**
7. From the **Folders** tab, select the folder containing the resources, and choose whether you will be adding items in subfolders as well
8. From the **Resources** tab, select the resources. You may choose to see resources only from the folder you have selected, or from its sub folders also
9. Click **Add** to add the specified resources to the parameter set
10. You may also remove resources from the parameter set by checking them and clicking **Remove**
11. Select the **Save As** option
12. In the **Name** field enter a name for the new report (parameter set)
13. Click **OK**

**Viewing an Audit Report**

More information on viewing reports is available in the User Manual. There are four audit reports available for use within the Management Portal. These are:

- **Audit Data Report** This report shows every provisioning change that has occurred within the system during the specified time period. This includes the name of the resource, the name of the user who made the edit, and whether the change was successful
- **Daily Audit Summary** This summarizes the changes made to resources during the day, showing the percentage and total of successful and failed changes at different times for individual items
- **Weekly Audit Summary** This summarizes the changes made to resources during the last week, showing the percentage and total of successful and failed changes on different days for individual items
- **Monthly Audit Summary** This summarizes the changes made to resources during the last month, showing the percentage and total of successful and failed changes on different days for individual items
7 Bulk Upload

The bulk upload tool is used to import hundreds of resource items into the Unified Contact Center Management Portal Platform. It is used to generate dimensions such as an Agent or a Skill-Group by filling in dimension attributes using the standard CSV format.

All CSV files require headers which dictate where each value goes. To facilitate this the Unified Contact Center Management Portal uses templates. Templates are a CSV file with all the headers set up. There is a Template for every dimension type; for example, one for Agents, one for Skill-Groups, and so forth.

**Note** Templates do not inform you the value type allowed in the field, for example, numeric values.

**Member Attributes**

Member attributes such as Peripheral Member or Desk Setting Member can always be removed from the CSV file completely, this means the relationship will never be set in any row in the CSV file. Alternatively you can leave this field blank, so there will be no relationship for that particular row.

**Editing CSV files**

You can use Notepad, or any other text-based editor to edit CSV files. Excel also offers support for CSV files so you can edit these in a familiar environment whilst maintaining the integrity of the CSV format.

**Note** There are a few known issues with Excel and the CSV format. If you find the CSV is corrupt after editing it in Excel, edit the file in a standard text editor such as Notepad and check the file for missing commas.

**Template Guide**

This section runs through every Template and describes the columns included in the Template.

For further information about the Data Type column in the tables below see the **Data Types** on page 36.

**Global Template Columns**

These columns are common to every template file.

The **Required?** column in the tables below tells you if you can remove the column should you not wish to set a value. An asterisk indicates that this column cannot support a field that is empty.

The **Description** column tells you if you may leave the field blank. Anything with **No** in this column must appear in every CSV file otherwise the upload will fail.
<table>
<thead>
<tr>
<th>COLUMN NAME</th>
<th>DATA-TYPE</th>
<th>REQUIRED?</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Path</td>
<td>Path</td>
<td>No</td>
<td>Describes where in the Tree the dimension will be created. If you wish to supply the path in the bulk upload screen, you must remove this column. <strong>Note</strong> If you leave the column present and do not set a value, it will attempt to upload into the Root directory, which is valid for items such as folders, but not for resources such as Agent or Skill Group. Removing the column completely allows you to control the path via the bulk upload control screen.</td>
</tr>
<tr>
<td>Name</td>
<td>SNC</td>
<td>Yes*</td>
<td>The name of the dimension in the Portal. This must be unique and won’t ever be provisioned.</td>
</tr>
<tr>
<td>Description</td>
<td>-</td>
<td>Yes</td>
<td>Describes the dimension being created. This never gets provisioned.</td>
</tr>
<tr>
<td>Enterprise Name</td>
<td>SNC</td>
<td>Yes*</td>
<td>The name for the dimension being created. This does get provisioned and <strong>cannot</strong> be omitted. If you leave it blank an Enterprise name is generated for you.</td>
</tr>
<tr>
<td>Effective From</td>
<td>Date</td>
<td>No*</td>
<td>The date from which the dimension is active from, default is today.</td>
</tr>
<tr>
<td>Effective To</td>
<td>Date</td>
<td>No*</td>
<td>The date from which the dimension is inactive default is today.</td>
</tr>
</tbody>
</table>
## Agent Template

<table>
<thead>
<tr>
<th>COLUMN NAME</th>
<th>DATA-TYPE</th>
<th>REQUIRED?</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peripheral Member</td>
<td>Enterprise Name</td>
<td>Yes*</td>
<td>The Peripheral to assign this Agent to.</td>
</tr>
<tr>
<td>Desk Setting Member</td>
<td>Enterprise Name</td>
<td>No*</td>
<td>The Desktop this Agent will use.</td>
</tr>
<tr>
<td>Agent Team Member</td>
<td>Enterprise Name</td>
<td>No*</td>
<td>The team this agent belongs to. The team must be on the same Peripheral otherwise provisioning will fail. This column may also be subject to capacity limitations. For example, there may only be so many agents allowed in a team and that team has already reached its capacity.</td>
</tr>
<tr>
<td>Portal Login</td>
<td>-</td>
<td>No</td>
<td>This column is a placeholder for a future feature and cannot be used yet. It is recommended that you remove it before uploading.</td>
</tr>
<tr>
<td>First Name</td>
<td>SNC</td>
<td>Yes*</td>
<td>The first name of the agent.</td>
</tr>
<tr>
<td>Last Name</td>
<td>SNC</td>
<td>Yes*</td>
<td>The last name of the agent.</td>
</tr>
<tr>
<td>Login Name</td>
<td>SNC</td>
<td>Yes*</td>
<td>The peripheral login name for the agent.</td>
</tr>
<tr>
<td>Pass Phrase</td>
<td>Password</td>
<td>Yes</td>
<td>The peripheral login password for the agent.</td>
</tr>
<tr>
<td>Supervisor</td>
<td>Boolean</td>
<td>No</td>
<td>Indicates whether the agent is a supervisor. This won’t create a Portal user, as this is a future feature, however it enables you to bind this agent to a domain login name.</td>
</tr>
<tr>
<td>Peripheral Number</td>
<td>Numeric</td>
<td>Yes*</td>
<td>The service number as known at the peripheral, note that you cannot leave this field empty.</td>
</tr>
<tr>
<td>Agent State Trace</td>
<td>Y/N</td>
<td>No</td>
<td>Indicates whether the software collects agent state trace data for the agent.</td>
</tr>
<tr>
<td>Domain Login Name</td>
<td>NETBIO S Login Name</td>
<td>No - if Agent is not a supervisor</td>
<td>The login name for the domain user the agent is bound to. This is only relevant if the Supervisor field is set to TRUE. Example: DOMAIN\USERNAME</td>
</tr>
<tr>
<td>-------------------</td>
<td>---------------------</td>
<td>-----------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Domain User Name</td>
<td>NETBIO S Username</td>
<td>No - if Agent is not a supervisor</td>
<td>The username of the domain user. So for the Login-name: DOMAIN\USERNAME, the Username is simply USERNAME.</td>
</tr>
</tbody>
</table>

**Folders Template**

<table>
<thead>
<tr>
<th>COLUMN NAME</th>
<th>DATA-TYPE</th>
<th>REQUIRED?</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Security</td>
<td>CSS Styled List</td>
<td>No</td>
<td>Allows you to set security on the folder you upload. To see an example, see Incorrect Data type Example on page 36.</td>
</tr>
</tbody>
</table>

**Agent Desktop Template**

<table>
<thead>
<tr>
<th>COLUMN NAME</th>
<th>DATA-TYPE</th>
<th>REQUIRED?</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wrap up Data Incoming Mode</td>
<td>Numeric</td>
<td>Yes *</td>
<td>Indicates whether the agent is allowed or required to enter wrap-up data after an inbound call. 0= Required 1 = Optional 2= Not allowed</td>
</tr>
<tr>
<td>Wrap up Outgoing Mode</td>
<td>Numeric</td>
<td>Yes *</td>
<td>Indicates whether the agent is allowed or required to enter wrap-up data after an outbound call. 0= Required 1 = Optional 2= Not allowed</td>
</tr>
<tr>
<td>Wrap-up Time</td>
<td>Numeric</td>
<td>Yes*</td>
<td>The amount of time in seconds (1-7200) allocated to an agent to wrap up the call</td>
</tr>
</tbody>
</table>
Remote Agent Type | Numeric | Yes * | Even though this field is mandatory, it is not actually used until version 7.2 of ICM, see the ICM documentation for more details.

### Agent Team Template

<table>
<thead>
<tr>
<th>COLUMN NAME</th>
<th>DATA-TYPE</th>
<th>REQUIRED?</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peripheral Member</td>
<td>Enterprise Name</td>
<td>Yes *</td>
<td>Same as Agent Peripheral Member.</td>
</tr>
<tr>
<td>Dialed Number Member</td>
<td>Enterprise Name</td>
<td>No</td>
<td>The dialed number to use for this Agent team.</td>
</tr>
</tbody>
</table>

### Enterprise Skill Group Template

This does not contain any dimension specific columns.

### Skill Group Template

<table>
<thead>
<tr>
<th>COLUMN NAME</th>
<th>DATA-TYPE</th>
<th>REQUIRED?</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peripheral Member</td>
<td>Enterprise Name</td>
<td>Yes *</td>
<td>Same as Agent Peripheral Member.</td>
</tr>
<tr>
<td>Peripheral Number</td>
<td>Numeric</td>
<td>Yes *</td>
<td>Same as Agent Peripheral Number.</td>
</tr>
<tr>
<td>Peripheral Name</td>
<td>SNC</td>
<td>No *</td>
<td>The name of the Peripheral as it is known on the site.</td>
</tr>
<tr>
<td>Available Hold-Off</td>
<td>Numeric</td>
<td>No</td>
<td>The value for this Skill Group instead of using the one associated with this peripheral.</td>
</tr>
<tr>
<td>Delay</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>IPTA</td>
<td>Y/N</td>
<td>No</td>
<td>Indicates whether the ICM picks the agent.</td>
</tr>
<tr>
<td>Service Level Threshold</td>
<td>Numeric</td>
<td>No</td>
<td>The service level threshold, in seconds, for the service level. If this field is negative, the value of the Service Level Threshold field in the Peripheral table is used.</td>
</tr>
</tbody>
</table>
### Service Level Type

<table>
<thead>
<tr>
<th>Service Level Type</th>
<th>Numeric</th>
<th>No</th>
<th>For Non-IPCC Enterprise, indicates how the ICM software calculates the service level for the service. See the ICM documentation to determine value meanings. Valid Values are 0, 1, 2 or 3.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Default Entry</th>
<th>Numeric</th>
<th>No</th>
<th>Normal entries are 0 (zero). Any records with a value greater than 0 are considered a default skill group for configuration purposes. Records having a value of 1 are used by OPC as the default target skill group.</th>
</tr>
</thead>
</table>

| Extension          | Numeric | Yes * | The extension number for the service (used by Lucent DEFINITY ECS). |

### User Variable Template

This does not contain any dimension specific columns.

### Using the Bulk Upload Tool

To use the bulk upload tool, perform the following: Open the **System Management** page, select the required tenant, click on **Upload** and then select the item types you want to bulk upload from the drop down list. The **Bulk Upload Control** page is displayed.

**Note** This path will only be used if you have removed the **Path** column in the CSV file. This is not relevant for folders as the path option is not available. Firstly select a template for your chosen dimension. The template link is present in the horizontal toolbar near the top of the page. Once selected, a download box is presented allowing you to save this CSV file onto your machine.

Once saved you can open it in the editor you require and begin to enter your data or paste it from another source.

Return to the **Bulk Upload Control** page and make sure the path is set correctly. Browse to the CSV file you have just entered the data into. Click **Upload**.

A progress bar at the bottom of the screen displays the upload progress.

**Note** Do NOT upload more than 500 items per CSV file.
If something goes wrong, pause the upload and check why an item failed. For further information about how an upload can fail, please see the Reasons for Upload Failure on page 37.

If the upload tool encounters a problem that affects all rows and not just the current one, an alert box appears that describes the problem’s description and will return you back to the Bulk Upload Control page.

Once every row has been processed a summary dialog appears to inform you of how many rows failed and how many passed. Please note this dialog does not give you the result of provisioning these items; only the result of uploading the items into the Unified Contact Center Management Portal system.

### Data Types

The following data types are used:

- **SNC** means Standard Naming Convention and is the same as the UI allows in the name fields on the provisioning pages. That is, alphanumeric characters, no exclamation mark or hyphens, and so on
- **BOOLEAN** means one of the following values:
  - TRUE
  - FALSE
  - Empty field. Leaving these fields empty defaults the field to FALSE
- **Y/N** is similar to Boolean however it can only contain the values Y or N
- **Date format** is the universal date format `<Year>-<Month>-<Day>` for example 2006-08-30
- Any Data Type marked with a hyphen (-) means that there are no constraints on what you can put in the field (except for the constraints imposed by the native CSV format)

### Incorrect Data Type example

It is vital to make sure that the values you place in the template are of a valid data-type. In the example below, an alphabetic data type has been used instead of a numeric one for a single field.

```
Name,Description,PortalLogin,FirstName,LastName,LoginName,Peripheral Number,BadAgent,imported agent,bada,bada,bada,bada
```

Note Some required columns have been omitted for the sake of simplicity.

This produces the following error:

```
System.invalidCastException: The Peripheral Number is not numeric
```

### Agent Security Field Example

Dos-styled Syntax Example:

```
<USERORGROUPNAME>:<ROLENAME>;<USERORGROUPNAME>:<ROLENAME>;<MULTIPLE ROLENAMES>
```
This is an example of what can be put into the **Security** field in the agent CSV file.

// #1 a single user with a single role  
Administrator:Tenant User  
// #2 a single user with more than one role  
Administrator:Tenant User:Tenant Supervisor  
// #3 multiple users  
Administrator:Tenant User:Tenant Supervisor;User1:Tenant User

Users are separated by semicolons, and the user and roles are separated by colons. This is very similar to the CSS syntax with the exception that a user or group can have multiple roles rather than one value.

**Reasons for Upload Failure**

The table below details the causes as to why an upload can fail.

<table>
<thead>
<tr>
<th>EXCEPTION TYPE</th>
<th>REASON</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Capacity Left</td>
<td>The capacity limit has been reached.</td>
</tr>
<tr>
<td>Enterprise Name Already Exists</td>
<td>The enterprise name already exists.</td>
</tr>
<tr>
<td>Login Name Already Exists</td>
<td>The peripheral login name already exists.</td>
</tr>
<tr>
<td>SQL Exception</td>
<td>The SQL error during upload, usually due to bad data.</td>
</tr>
<tr>
<td>Argument Exception</td>
<td>An attribute contains a bad value. It is usually an exception because you have an empty string in the <strong>Path</strong> column when attempting to upload items which cannot live in the <strong>Root</strong> folder.</td>
</tr>
<tr>
<td>Security Exception</td>
<td>You do not have security permissions to upload to here.</td>
</tr>
<tr>
<td>Format Exception</td>
<td>Invalid data in a column.</td>
</tr>
<tr>
<td>No Identity Available</td>
<td>Identity not available.</td>
</tr>
</tbody>
</table>
8 INDEX

A
Advanced Mode ..................... 18
Agent ................................. 33
Agent Team ......................... 35
Alarm ............................... 25
Alarm generator .................... 24
Application Component ........... 14
Argument Exception ............... 38
Audit ................................. 14, 29
History ............................... 29
Audit Name .......................... 29
Audit Report ........................ 29

B
Boolean ............................... 37
Bulk upload .......................... 31, 36

C
Call Error Rate ..................... 22
Call Reject Rate ..................... 22
Call Request Rate .................. 22
Call Timeout Rate ................. 22
Comma Separated Value ... See CSV
Configuration Manager .......... 16
Corrupt CSV file ................... 31
CSS ...................................... 38
CSV ...................................... 31

D
Data Import Component .......... 15
Database ............................. 14
Database Server ................... 15
Date format .......................... 37
Description .......................... 31
Dialed Number ...................... 35
Domain Login Name ............... 34
Domain User Name ................ 34

E
Edit Filter ........................... 29
Enabled Period ...................... 21
Enterprise Name Already Exists.. 38
Enterprise Skill Group .......... 35
Error .................................. 37, 38
Errors ............................... 21
Event log ............................ 24
Event Outcome ...................... 30
Event Source ........................ 29
Example ............................. 37
Excel .................................. 31

F
Failed transactions ............... 26
Failover .............................. 14, 27
Failure ............................... 37, 38
Filtered ............................. 21
Format Exception ................... 38

G
Gateway.................. See Provisioning
Component
Gateway Monitoring ............... See
Provisioning Component

H
History tab ........................... 29
Host Administrator .............. 16, 17
Hyphen ............................... 37

I
ICM ..................................... 16
Import
Resource data ....................... 17
Importance
Alarms ............................... 28
Incoming ............................. 34
IP address ............................ 24
IPTA .................................. 35
Item Name ............................ 30
Item Type Name ..................... 29
Item Type Success ............... 30

L
Log ..................................... 23
Application ......................... 25
Event ................................. 23
Login Name Already Exists....... 38

M
Member attributes ................ 31
N
NETBIOS ..................................... 34
No Capacity Left .......................... 38
No Identity Available ................... 38
O
Offline ..................................... 26, 27
Oneshot .................................... 21
Online ....................................... 25
Outgoing ..................................... 34
Outstanding
Calls ......................................... 22
Requests .................................... 21
P
Pass phrase .................................. 33
Password .................................... 18
Path .......................................... 36
Perfmon ...................................... 22
Perfmon ...................................... 23
Performance Counters .................... 22
Scheduling ................................... 23
Peripheral Number ........................ 33
Prefix ........................................... 17
Create ........................................... 17
Edit ............................................. 18
Priority ....................................... 17, 18
Privileges ................................... 19
Processor ..................................... 21
Provisioning .............................. 16, 20
Provisioning Component ..14, 22, 24
Monitoring .................................... 21
R
Rejected transactions .................... 27
Remote Agent ............................. 35
Report Success ............................ 30
Reporting .................................... 14
Reporting Period ......................... 23
Reporting Services ........................ 14
Reports ....................................... 29
Required?................................... 31
Resource Name ................................ 29
Restart ...................................... 21
S
Script ........................................... 21, 25
Security ................................. 19, 20, 34, 37
Security Exception ........................ 38
Security Manager .......................... 18, 20
Service Level Threshold .................. 35
Service Level Threshold .................. 35
Skill Level Type ............................ 36
SNC ............................................ 37
SNP Service .................................. 24
SNMP Traps .................................. 23, 24, 28
SQL Exception ............................. 38
Standard Naming Convention.............. 38
State ........................................... 31
State Trace ................................... 33
Supervisor .................................... 33
Synchronize
IPCC ............................................ 16
System Manager ............................. 17, 20, 29, 36
T
Template ....................................... 31
Tenant ........................................... 16, 29
Tenant Administrator ..................... 16, 18
Tenant Success ............................. 30
Tenant User .................................. 16
Throttling .................................... 24
Timed out .................................... 27
Timeout ........................................ 27
Timeout .See Timed out
Total Call Errors .......................... 22
Total Call Requests ...................... 22
Total Call Timeouts ...................... 22
Total Calls Rejected ...................... 22
Total Processor Starts ................... 22
Total Processor Stops .................... 22
Transactions .................................. 21
Trap Throttling .............................. 24
U
Upload, bulk .............................. 31
User types .................................... 16
User Variable ............................... 36
W
Web Application Server ............... 15
Web monitoring ............................. 21
Web Server ................................... 14, 16
Wrap up ........................................ 34
Y
Y/N data type ................................ 37