



Plan

- [Introduction to Plan, page 1](#)
- [Planning Concepts, page 2](#)
- [Planning Tasks, page 6](#)

Introduction to Plan

In the Plan phase, you assess your readiness to support a proposed solution. Planning continues the needs analysis begun in the Prepare phase, with the goal of producing a high-level project plan and the initial site survey.

Before You Begin

Understand the features and functions of contact center applications. Start with the [Planning Concepts](#) and the [System Release Notes](#). Then review the business requirements, deployment models, and sites to understand the options that are available for your specific environment.

When You Are Done

You have defined and created the following:

- A comprehensive list of components and applications that match the requirements
- A project plan based on those requirements including a proposed, high-level design

Major Concepts and Tasks in This Process

- [Planning Concepts, on page 2](#)
- [Planning Tasks, on page 6](#)
- [Sample Business System Test Beds, on page 6](#)

Planning Concepts

This topic presents planning concepts. It is assumed that your network is a converged network that combines voice, data, and video and that you have decided on one of network types discussed in the [Internetwork Design Guide](#).

The primary planning considerations that drive the planning stage are: types of deployment, whether it is a new installation, a migration to an installation with existing equipment, or an upgrade from a previous release to the current release; application availability based on your networking needs for multimedia and voice, security, redundancy, fault tolerance, and the costs associated with your needs.

Your goal is to minimize costs while delivering service that does not compromise established availability and performance requirements. These issues are essentially at odds. Any increase in availability and performance must generally be reflected as an increase in cost. As a result, carefully weigh the relative importance of resource availability, performance constraints, variables, and overall cost.

**Note**

The concepts discussed in this topic are meant to be a high-level overview of considerations and are not meant to be a definitive set of rules.

- [Deployment Types](#), on page 2
- [Cost of Ownership](#), on page 3
- [Redundancy](#), on page 3
- [Capacity and QoS](#), on page 4
- [Security](#), on page 4
- [Sample Business System Test Beds](#), on page 6
- [Understand Your Call Flows](#), on page 6

Deployment Types

The deployment types to consider are as follows:

- New installation
 - Greenfield—Completely new installation of the Cisco Collaboration System, using no existing equipment.
 - Legacy—New installation of the Cisco Collaboration System combined with existing legacy equipment, such as TDM PBXs and third-party adjuncts, which may require long-term coexistence and integration or eventual migration to the new installation.
 - Brownfield—Existing Cisco Collaboration System, which requires an upgrade and migration from a previous system release to the current system release.
- Single-Stage Upgrade

- Using existing hardware—All components in the network start at the base release set and all components can be upgraded to the target release set within a single maintenance window.
- Using new hardware (flash-cut or shrink-and-grow)—A parallel network should be built using new hardware and prestaged with configuration to support the existing production network.
- Multistage System Upgrade
 - Using existing hardware (hybrid system)—The components in individual sites can be upgraded from the base release set to the target release set in stages, during separate maintenance windows.
- Multisite Migration with Independent Site Upgrade
 - Using a hybrid network with interworking release sets—Components are upgraded on a site-by-site basis during separate maintenance windows. At the completion of each maintenance window, a hybrid network exists within the multiple sites that have components operating on the base release set; or components that are operating on the target release set; or components that are a hybrid system.

Cost of Ownership

Information system budgets can run into millions of dollars. As large organizations increasingly rely on electronic data for managing business activities, the associated costs of computing resources continue to rise. Therefore, include the following in your basic network plan:

- Environmental consideration—Include the location of hosts, servers, terminals, and other end nodes; the projected traffic for the environment; and the projected costs for delivering different service levels.
- Performance constraints—Consider network reliability, traffic throughput, and host and client computer speeds. For example, network interface cards and hard drive access speeds
- Internetworking variables—Include the network topology, line capacities, packet flow assignments, redundancy and fault tolerance factors, backward compatibility (coexistence and interoperability), and security.

Redundancy

Redundancy is critical considering the number of vital business applications running on the network. If you have a distributed network with several access layers to remote offices, and you have a failure from the distribution layer to the core without redundancy, you have loss of network service for many people. If you have redundancy in the distribution layer and the core, you can potentially lose one or more circuits without disturbing service to any particular group of users. Depending on the application, you may also need some redundancy from the access layer to the distribution layer.

Because of redundancy, if you drop a link at any one point in the network, every remote group or user still has a path to get back to the core. Even if you cut off the connection from one of the distribution switches back to the core, you still have access to the core for every user.

For more information on redundancy planning, see the [Redundancy and Load Sharing Design Guide](#).

Capacity and QoS

Capacity and QoS are major considerations in a converged network and effect one another. QoS is needed to prevent applications from using more than a fair share of bandwidth and degrading the performance of other applications. At the WAN interface, QoS is needed to allocate expensive wide area capacity among applications.

Bandwidth and QoS requirements are easy to figure in a multilayered design because the traffic flow is fairly predictable. You can also have end-to-end QoS in a multilayered design. End-to-end QoS is critical when you have real-time applications, such as a voice conversation or video presentation, and you have non-real time applications that can interfere with the real-time applications. For example, if the real-time and non-real time applications arrive at the same layer at the same time, the network must pass the real-time packets first, as well as keep latency and jitter low. QoS end-to-end is the answer.

Consider Call Admission Control (CAC) as an alternative to QoS. CAC limits the amount of traffic allowed onto the network at the ingress point. Because you know that the network will be congested at various times during the day, you can disallow more traffic by using CAC. Also consider using traffic-shaping techniques using a traffic-shaping device. A combination of QoS, CAC, and traffic shaping provides optimal performance for applications on a converged network.

Managing link speed mismatches is the last element of traffic management. The mismatches, called chokepoints or bottlenecks, are a basic design issue whenever a large capacity link generates traffic destined for a low capacity link. To avoid the mismatches, carefully analyze the traffic and the device capabilities, then upgrade the interface (if needed) and apply a combination of CAC and QoS.

For more information on QoS, see the [Enterprise QoS Solution Reference Network Design Guide](#).

Security

Cisco recommends multiple layers of security technologies to prevent a single configuration error from jeopardizing the security of the network. Cisco also recommends operational processes that ensure prompt application of software patches, timely installation of new security technologies, and performance of regular security audits and assessments.

As you begin to design your network, rank the importance of your network assets and services by considering these factors:

- What keeps you in business?
- How do you make money?
- Does loss of data or privacy equal lost money?
- What about regulatory compliance?
- How do you protect your critical data?
- Where does voice fit?

Then consider the potential threats to your business, which may include

- Toll fraud
- Eavesdropping
- Address spoofing

- Fake caller identity
- Media tampering
- Denial of service
- SPAM, SPIT (SPAM over IP telephony), and SPIM (SPAM over Instant Messaging)

In addition to the operational processes, review and consider advanced security technologies. Security technologies can be categorized as follows:

- Network security
 - Virtual LANs (VLANs)
 - Access control lists (ACLs)
 - Stateful firewalls with protocol aware inspection
 - Virtual Private Networks (VPNs)
 - QoS
 - Dynamic Address Resolution Protocol (ARP) inspection
 - Dynamic Host Configuration Protocol (DHCP) snooping
 - Port security
 - Network intrusion prevention
- Host security
 - Cisco Security Agent
 - Third-party antivirus software
 - Host-based firewalls
 - Hardened operating systems
- User authentication, authorization, and accounting security
 - Phone image authentication
 - Multilevel administration privileges
 - Call detail reporting

For more information about Cisco end-to-end security designs, see the Cisco SAFE guidelines at http://www.cisco.com/c/en/us/solutions/enterprise/design-zone-security/landing_safe.html. For more details about Cisco-integrated network security solutions, see the following resources:

- [Security Products and Solutions](#)
- [Secure Unified Communications](#)
- [Cisco Support Community for Security](#)

Sample Business System Test Beds

System testing defines and validates the interoperability and stability of components that comprise a complete and optimized Cisco Collaboration System. The system test includes installing, configuring, and testing contact center hardware and software that are designed to work together in a predictable, effective, and reliable manner.

Use System Test Beds to Define Your Business Requirements

Cisco Systems has defined real-world business requirements in test beds that utilize the contact center system. The business requirements were created in a test environment to validate the contact center solution for these business models.

Test beds define business requirements, agent profiles, and call flows that are typically used by various business models.

Review these test beds to understand how the contact center system meets real-world business needs. For additional information on various industry solutions, such as financial markets, see the following URL:

<http://www.cisco.com/web/strategy/index.html>

Test Beds

These test beds include the Unified CVP Post-Routed call flows in a contact center with local and remote agents and Unified CCX call flows. For more details, see:

- [Unified CCE Test Bed Description](#)
- [Unified CCX Test Bed Description](#)

Call Flow Models

The case study methodology is continued for each PPDIIO process by using the deployment models and sites that were developed for testing.

- [Review Tested Deployment Models](#)
- [Install and Configure System Components](#)
- [Operating Contact Center Systems](#)
- [Failover and Redundancy](#)

Understand Your Call Flows

Call flow analysis is an important part of determining your business requirements. Call flows show you how your calls are handled physically, which drives your equipment requirements. Call flows also help to determine the network routing plan.

Planning Tasks

The following overview shows the high-level tasks of the planning process:

- [Determine Your Business Requirements](#), on page 7
- [Use Planning Tools and Templates](#), on page 8
- [Understand Your Deployment Options](#)
- [Identify System Components](#), on page 10
- [Collect and Analyze Data](#), on page 10
- [Create High-Level Design](#), on page 11
- [Planning a System Installation](#), on page 8
- [Planning a System Upgrade](#), on page 8

Determine Your Business Requirements

Consider the following factors in your call center:

- Collect requirements
 - Assess user requirements
 - Identify functionality requirements
- Contact center operations
 - Number of sites
 - Agents and types of services
 - Types of calls, call treatment, and call handling
 - Busy hour calls attempts (BHCA) rate
- Call flows
- Installation and upgrade requirements
 - Installation and configuration information
 - Upgrade and migration information

Collecting Requirements

The following are suggested methods to use in gathering information to plan your network:

- **Assess User Requirements**—Users want applications to be available on demand in the network. The chief components of application availability are response time, throughput, and reliability. You can assess user requirements as follows:
 - Develop community profiles of what different user groups require. Although many users have roughly the same requirements of an electronic mail system, engineering groups using Windows terminals and Sun workstations in an NFS environment have different needs from PC users sharing print servers in a finance department.

- Build a baseline for implementing an internetwork by interviewing groups, forming focus groups, or using surveys. Some groups might require access to common servers, while others might want to allow external access to specific internal computing resources. Formal surveys can be used to get a statistically valid reading of user sentiment regarding a particular service level or proposed internetworking architecture.
 - Conduct a test involving representative users in a lab environment. This is most applicable when evaluating response time requirements. As an example, you might set up working systems and have users perform normal remote host activities from the lab network. By evaluating user reactions to variations in host responsiveness, you can create benchmark thresholds for acceptable performance.
- Identify Functionality Requirements—After you understand your internetworking requirements, you can select the specific functionality that fits your environment, such as the level of application availability and the implementation costs for that availability. Also, consider fault tolerance and redundancy.

Call Center Operations

See [Use System Test Beds to Define Your Business Requirements](#), on page 6 for information on customer business requirements such as number of sites, agent profiles, types of calls, call handling and call treatment options, and sample call flows.

Call Flows

See [Understand Your Call Flows](#), on page 6.

Planning a System Installation

For installation and configuration checklists and documents, see the [Installation and Configuration Checklists](#) topic.

For a list of installation and configuration documents for the software and hardware components that are part of the Cisco Collaboration Systems contact center products, see the [Component Installation and Configuration Guides](#) topic.

Planning a System Upgrade

When your upgrade plan is in place and you are ready to upgrade, go to [Performing a System Upgrade](#).

Use Planning Tools and Templates

This topic includes planning tools and links to documents that provide guidelines for designing and configuring your Cisco Collaboration Systems. It also includes information on quoting and ordering Cisco Collaboration Systems products.

Design Documents

Solution Reference Network Design (SRND) documents provide guidelines, recommendations, and best practices for implementing enterprise networking solutions. The following guides are recommended for designing Cisco Collaboration Systems for contact centers:

- [Cisco Collaboration Solutions Design Guidance](#)
- [Cisco Unified Contact Center Enterprise Design Guides](#)
- [Cisco Unified Contact Center Express Design Guides](#)
- [Cisco Unified Customer Voice Portal Design Guides](#)
- [Cisco MediaSense Design Guides](#)
- [Cisco Unified Intelligence Center Design Guides](#)

**Note**

More planning resources are available at <http://www.cisco.com/c/en/us/solutions/enterprise/design-zone/index.html>.

Ordering Guides

[Ordering guides](#) for most Cisco Collaboration Systems products are available for Cisco partners, Cisco sales staff, and Cisco service providers.

Deployment Models

With Cisco Collaboration Systems, you can choose from many deployment options, including cloud computing, hybrid, and on-premises. The following sections provide deployment model examples and information.

Cisco Preferred Architecture and Cisco Validated Designs

Cisco Preferred Architectures and Cisco Validated Designs (CVDs) help you design and deploy powerful, comprehensive, and scalable collaboration architectures with collaboration services, such as Cisco Unified Communications, Video Collaboration, and Contact Center. Cisco Preferred Architectures and CVDs guides provide the framework for systems design based on common use cases or current engineering system priorities. Cisco engineers have tested and documented each CVD to help ensure a faster, more reliable, and more predictable deployment.

- Cisco Preferred Architecture design overviews provide a prescriptive, end-to-end architecture, an understanding of the individual products and their role in the overall architecture, along with basic design best practices and a sample Bill of Materials
- CVDs provide detailed design and step-by-step deployment information for collaboration deployments and are based on Preferred Architectures.

For samples of Cisco Preferred Architecture and CVDs, see [Cisco Validated Designs for Collaboration](#).

Tested Deployment Models

Cisco has developed various site models as standard architectures. These models were tested and optimized for maximum efficiency and performance. You can derive your network design by choosing the deployment model that most closely matches your business and then adding the specific features and applications that meet your business needs.

For information about Contact Center deployment Unified Contact Center Enterprise models tested by the Collaboration Systems Validation team for this release, go to http://www.cisco.com/c/en/us/td/docs/voice_ip_comm/uc_system/V11-0-1/TIS/CC-UCCE-CSR1101-TestBed.html.

For information about Contact Center deployment Unified Contact Center Express models tested by the Collaboration Systems Validation team for this release, go to http://www.cisco.com/c/en/us/td/docs/voice_ip_comm/uc_system/V11-0-1/TIS/CC-UCCX-CSR1101-TestBed.html.

For information about Collaboration tested deployments and site models for this release, go to http://www.cisco.com/c/en/us/td/docs/voice_ip_comm/uc_system/V11-0-1/TIS/COL-CSR1101-TestBed.html.

Cisco Collaboration Systems Solution Reference Network Designs (SRND)

For more guidelines, recommendations, and best practices for implementing Collaborations networking solutions, go to [Cisco Collaboration Solutions Design Guidance](#).

Identify System Components

For links to product documentation of the contact center products tested as part of the Cisco Collaboration Systems Release 11.0(1), see the [Product Documentation](#) topic in the System Release Notes for Contact Center.

The [Compatibility Matrix](#) lists all the components and their versions for a particular release. It is the recommended set of components and specific software versions that have been tested and verified for interoperability within a specific system release. For compatibility information prior to Collaboration Systems Release 10.5(1), refer to the [Compatibility Tool](#).

Use Bill of Materials (BOM) for hardware and software specifications that are compatible with contact center components:

- [Hardware and System Software Specification \(Bill of Materials\) for Cisco Unified ICM/Unified CC Enterprise & Hosted Editions](#)—Specifies the hardware and system software compatible with and required for Cisco Unified ICM and Cisco Unified Contact Center.
- [Hardware and System Software Specification for Cisco Unified Customer Voice Portal](#)—Provides platform hardware specifications and compatible third-party software version requirements across the major components of the Cisco Unified CVP solution.
- [Hardware and System Software Specification \(Bill of Materials\) for Cisco Unified Intelligence Center](#)—Specifies the hardware and software that have been qualified by Cisco Quality Assurance for use with Cisco Unified Intelligence Center (Unified IC).

Collect and Analyze Data

Using available tools, collect data on the network to assess network readiness. Tasks for data collection and analysis include:

- Perform an infrastructure analysis—Obtain floor plans and campus maps, including utilities and conduit systems, to identify deficiencies in infrastructure.
- Perform a software gap analysis—Do a software gap analysis to address network management tools for the IP network.
- Perform an initial traffic analysis—Collect data on all potential converged infrastructure traffic flows. Use station message detail recording (SMDR) and billing records to determine legacy call volumes and use network management tools to collect key statistics on your IP data network.

Create High-Level Design

When data is collected and analyzed, record the results in the site survey and high-level design documents.

Preparing for Your System Installation

Before the actual installation process, review the release set versions of the contact center components being installed, and dependencies impacting system installation.

For more information, see:

- [Cisco Collaboration Systems Compatibility Matrix](#)
- [Limitations and Restrictions](#)

When your installation plans are in place and you are ready to install components, go to [Performing Your System Installation](#).

Preparing for Your System Upgrade

**Note**

There may be more than one upgrade path based on the software deployed in your specific environment. For more information, see Upgrade Paths.

Before the actual upgrade process, review the different contact center components, upgrade release versions of components involved in the upgrade, and upgrade dependencies and considerations.

For more information, see:

- [Cisco Collaboration Systems Compatibility Matrix](#)
- [Limitations and Restrictions](#)

When your upgrade plan is in place and you are ready to upgrade, go to [Performing Your System Installation](#).

