

Intelligent Queue to IVR Routing Migrations

Support Information

Mitel IVR Routing (IVR) replaces the existing Mitel Intelligent Queue (IQ) software application. Both products are currently available in parallel to allow for the migration from IQ to IVR.

General Support Statement for Contact Centers, IVR Routing and Call Accounting

Support is provided for the two most recent releases of Contact Center, IVR Routing and Call Accounting software only: N.X-1 (for example if 6.1 is currently GA, we support release 6.1 and 6.0). Upgrade support is provided for N.X-2 (for example if 6.1 is currently GA, we support upgrading from 6.0 and 5.8).

We have extended the Manufacture Discontinuance dates of the Intelligent Queue products for an additional 6 months. Intelligent Queue, version 5.8, base product purchases will now be Manufacture Discontinued on May 15, 2013, and Intelligent Queue add-on product purchases will be Manufacture Discontinued on May 15, 2014. Intelligent Queue 5.8 will continue to be compatible with Contact Center versions up to and including 7.0. All future versions will no longer support Intelligent Queue.

Mitel will provide a best effort attempt to assist in-warranty Intelligent Queue, version 5.8, customers with reported problems. No software fixes or features will be provided beyond version 5.8 for the discontinued product.

See product bulletin PA20110363 for the introduction of the Intelligent Queue replacement product, known as IVR Routing and the free migration offering. See Mitel Technical Service Bulletin 12-5127-00105 for information on the IQ to IVR Routing migration options available.

Supplementary Information

If you are in warranty your IQ products will be mapped to IVR and you will be given equivalent licensing on migration. You can migrate immediately or you can migrate over time. The following document provides some possible migration strategies for transitioning from an existing IQ installation to IVR Routing.

General Information

This article outlines some possible migration strategies for transitioning from an existing Intelligent Queue installation to IVR Routing.

If desired, you can gradually migrate your existing Intelligent Queue system over to IVR Routing. During this update process, sites can operate a mixed configuration of IVR Routing and Intelligent Queue within the same enterprise. However, there are rules that must be followed to ensure both applications are configured correctly and do not attempt to share ports.

NOTE:

- Additional purchase of port licensing on the PBX is not required if the PBX is on MCD Version 5 or greater. Unlike Intelligent Queue, IVR Routing is a trusted application on the MCD and, as such, does not require a PBX port license to activate the use of a port.
- To host Intelligent Queue and IVR Routing in the same enterprise Intelligent Queue must be Version 5.8, as it is compatible with all Contact Center Solutions 5.8 and 6.0 versions.
- On request, the Intelligent Queue to IVR Routing licensing migration provides you with mirror IVR Routing licensing to match your Intelligent Queue licensing. However, if you had a mixture

of Intelligent Queue feature level starter packs and ports, your IVR Routing licensing provides the same number of starter packs and ports but only at the highest level feature set owned.

- For example, if you own 1 Standard Intelligent Queue Starter Pack with 8 Standard Intelligent Queue Ports and 1 Premium Intelligent Queue Starter Pack with 12 Premium Intelligent Queue Ports, upon migration, you will receive 2 Premium IVR Routing Starter Packs with 20 Premium IVR Routing Ports. You cannot mix and match levels in IVR Routing.
- There is no cost to migrate Intelligent Queue to IVR Routing, however, depending on your Intelligent Queue feature mix, this can have an impact on your software assurance renewal costs. If you do not plan to leverage higher level IVR Routing features, you can optionally request that your migration move you to a lower level of IVR Routing.
- Intelligent Queue base products will no longer be available for purchase as of November 15, 2012. Intelligent Queue add-on products will no longer be available for purchase as of November 15, 2013. Starting November 15, 2013, no further Intelligent Queue software updates will be provided. Mitel will, however, continue to provide best effort support.

IVR Routing port sizing - considerations for active and redundant ports

While working to achieve scale or the desired level of redundancy or resiliency in Intelligent Queue, customers may have purchased more active ports than necessary. When migrating to IVR Routing, these ports can be split into active and redundant IVR Routing ports. This can reduce the amount of Software Assurance required and help provide the optimum setup.

Adhere to the following rules to ensure the customer has the correct number of active and redundant IVR Routing ports:

1. Make a record of the current Intelligent Queue setup and list all of the existing call flows.
2. Determine which Intelligent Queue features are currently being used.
3. If higher level features are not in use, you can request upon migration to IVR Routing that a downgrade be performed, giving the customer the level required to access the features they use. Optionally, if the customer needs more functionality than currently owned, once migrated to IVR Routing, the customer can purchase a starter pack(s) and port upgrade(s) to bring them to the desired level.
4. If the customer has more active ports than required for daily use, consider migrating the remaining ports to redundant port licensing for use during an IVR Routing Server outage. If this is desired, please include this in your Intelligent Queue to IVR Routing migration request. If the customer has no remaining ports available but would like to leverage the redundant feature set, they can optionally purchase redundant IVR Routing ports to complement their IVR Routing setup.

NOTE: Mitel also offers port resiliency on the PBX that allows the port to failover to a secondary PBX in the event of a primary PBX outage.

5. Use the IVR Routing Port Sizing Tool to determine the number of active and redundant ports required.

The IVR Routing Port Sizing Tool can be found here:

[https://portal.prairiefyre.com/sites/Mitel/ResourceCenter/Lists/Hardware and Software Requirement Guides/AllItems.aspx](https://portal.prairiefyre.com/sites/Mitel/ResourceCenter/Lists/Hardware%20and%20Software%20Requirement%20Guides/AllItems.aspx)

6. Contact MiCC_TechConsulting@Mitel.com with any questions.

NOTE: Before contacting the Systems Engineering Team at prairieFyre, ensure both IVR Routing Port Sizing Tool summary pages have been completed and attached to the email.

Migration administration process

NOTE: The following processes assume that the customer is currently running Intelligent Queue Version 5.8 and their PBX is MCD 5 .

If the customer does not require assistance from the Systems Engineering Team:

1. If you need to make any licensing changes such as downgrading licensing level or leveraging a portion of ports for redundancy, send an email to MiCCR renewal@mitel.com, otherwise contact Customer Support to have your license converted "as is" from IQ to IVR, keeping the same features and number of ports.

2. If the customer is within warranty, the migration is performed and the new IVR Routing licensing is provided.

NOTE: The Intelligent Queue moss password remains active; no new licensing for Intelligent Queue will be provided.

3. The customer can now have two functioning systems, Intelligent Queue and IVR Routing, and can begin programming IVR Routing. The following rules apply when operating both routing systems in parallel:

- Intelligent Queue and IVR Routing cannot share ports.
- Intelligent Queue must be Version 5.8.
- Intelligent Queue must be on a separate server and cannot be collocated with IVR Routing or Contact Center Management.
- MCD must be Version 5 or greater. If not, the customer must ensure they own the necessary PBX port licensing.

4. Once the migration of Intelligent Queue call flows to IVR Routing is complete, the customer can decommission the Intelligent Queue server.

If the customer requires assistance from the Systems Engineering Team (SE):

1. Create a service request online by logging into **Mitel Online**, and going to **Services => Professional Services => Related Links**. Click the **Request a Quote** option.
2. SE creates a project case to capture all information shared by the customer.
3. SE provides the customer with a quote.
4. The customer agrees to pay for the services as quoted.
5. SE calls a meeting to discuss options and recommends a configuration plan.
6. SE works with Administration to obtain updated IVR Routing licensing, based on mapping from the customer's Intelligent Queue setup.
7. SE works with the customer to configure their IVR Routing application. New ports are used or existing ports are re-used in batches as the call flows are built to move the call handling gradually from Intelligent Queue to IVR Routing.
8. Once the call flow migration is complete the customer can decommission the Intelligent Queue server.

Migration Strategies

The following migration strategies are discussed in this document:

- Fully mirrored
- Split setup based on DNIS
- Branching to IVR Routing
- Feature specific IVR Routing

NOTE: These examples assume that Contact Center Management is Version 6.0 and systems engineering guidelines have been followed when provisioning the IVR Routing server. If further information is required, see the *Contact Center Solutions and Call Accounting Systems Engineering Guide*.

Fully Mirrored

If you want to test the full functionality of IVR Routing, while co-existing with Intelligent Queue, a fully mirrored setup is required. In this scenario, IVR Routing should be programmed to match the current Intelligent Queue programming.

To migrate using a fully mirrored setup:

1. Ensure the IVR Routing Server is synchronized with the telephone system before importing Intelligent Queue data to IVR Routing.
2. Create a folder to house the exported Intelligent Queue data. Several .csv files will be created, for example, DNIS, Queue, Redirection, and Schedule conditions.
3. Run the **IVR Routing Migration Wizard**.
4. In **YourSite Explorer => Visual Workflow Manager**, import the .csv files from the migration folder you created. See “Running the Intelligent Queue to Visual Workflow Manager Migration Wizard” section in the *Contact Center Management Installation Guide* for more details.
5. Build the IVR Routing call flow to match the existing Intelligent Queue call flow.
6. In order to test IVR Routing functionality, remove an Intelligent Queue port from a main hunt group and designate it as an IVR Routing port.
 - The IQ port can be removed from the 3300 ICP directly or through YourSite Explorer (in the Membership tab for Hunt Groups).
 - Remove the port you will designate as an IVR Routing port from the Intelligent Queue Port Configuration Tool, as shown in Figure 1.
 - Add the port as an IVR Routing port in YourSite Explorer. See the Contact Center Solutions User Guide for more information on creating IVR Routing ports.

Figure 1: Deleting the IVR Routing port from Intelligent Queue

7. In **YourSite Explorer => Visual Workflow Manager => Call flows => Port Membership** tab, associate the mirrored IVR Routing call flow to the individual port you selected above.

NOTE: If the call flow is associated to the hunt group containing the other Intelligent Queue ports, the port will go in and out of service and will not function properly.

8. You can either call the port directly during the testing phase or add the IVR Routing port back into your main hunt group and set up the hunt group as circular so that the IVR Routing port will be used every Nth call.

NOTE: After the IVR Routing server has been synchronized with the telephone system, YourSite Explorer can be used to set the hunt group to circular.

9. Gradually transition ports from Intelligent Queue to IVR Routing. After all ports have been moved over you can, optionally, load the call flow onto the hunt group rather than the individual ports.
10. Optionally, decommission Intelligent Queue.

Split setup based on DNIS

In a split setup based on DNIS, a certain percentage of calls are handled by Intelligent Queue while the remaining calls are handled by IVR Routing. Incoming calls are handled by each application according to their DNIS number. For example, callers calling from 1-800-555-1234 could be handled by Intelligent Queue and those calling from 1-800-555-5678 could be handled by IVR Routing. Calls would be transitioned over to IVR Routing on a per DNIS basis.

For an example of a typical Intelligent Queue DNIS call flow, see Figure 2. For an example of a split call flow based on DNIS, see Figure 3.

Figure 2: Typical Intelligent Queue DNIS call flow

Figure 3: Split configuration call flow

To migrate using a split setup based on DNIS

1. Ensure the IVR Routing Server is synchronized with the telephone system before importing Intelligent Queue data to IVR Routing.
 2. Create a folder to house the exported Intelligent Queue data. Several .csv files will be created, for example, DNIS, Queue, Redirection, and Schedule conditions.
 3. Run the **IVR Routing Migration Wizard**.
 4. In **YourSite Explorer => Visual Workflow Manager**, import the .csv files from the migration folder you created. See “Running the Intelligent Queue to Visual Workflow Manager Migration Wizard” section in the *Contact Center Management Installation Guide* for more details.
 5. Configure incoming calls from DNIS A to terminate at the Intelligent Queue hunt group and incoming calls from DNIS B to terminate at the IVR Routing hunt group.
 6. Select and remove the ports that you want to split from the Intelligent Queue call flow. Refer to the instructions for the fully mirrored scenario above to remove ports from the Intelligent Queue hunt group and from the Intelligent Queue Port Configuration Tool.
 7. Create a new IVR Routing hunt group on the 3300 ICP directly or through YourSite Explorer.
 8. Add the ports to the new hunt group.
- NOTE:** Ports cannot be mixed between Intelligent Queue and IVR Routing.
9. Build the IVR Routing call flow identically to the Intelligent Queue call flow.
 10. Assign the new hunt group to the new call flow.

Branching to IVR Routing

When migrating to IVR Routing using the branching method, only certain subsections of existing Intelligent Queue call flows are handled by IVR Routing. Branching can be done by ANI, DNIS, Interactive Tree submenu, or condition.

NOTES:

- This method will not work in all situations. To enable IVR Routing to branch from Intelligent Queue, Intelligent Queue must be able to transfer calls to a Dialable Number (DN). The DN can be an IVR Routing port or an IVR Routing hunt group.
- Ports cannot be shared between Intelligent Queue and IVR Routing.
- When branching from an Intelligent Queue call flow, each branch must terminate in an IVR Routing hunt group or port.
- All ports used by IVR Routing must be removed from the Intelligent Queue Port Configuration Tool.

Feature specific IVR Routing

IVR Routing may be provisioned to handle one or more specific features. For example, IVR Routing may be used to handle all UPIQ requests, callback requests, or all RAD messaging.

NOTE: All ports that will be used for IVR Routing must be removed from the Intelligent Queue Port Configuration Tool.

APPLIES TO

IVR 6.0 and higher

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