



## **Avaya Solution & Interoperability Test Lab**

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# **Application Notes for Inisoft synTelate with Avaya Proactive Contact using PG230 and Call Blending – Issue 1.0**

### **Abstract**

These Application Notes describe the configuration steps required for Inisoft synTelate to interoperate with Avaya Proactive Contact using PG230 and call blending. In the compliance testing, Inisoft synTelate used the Agent API from Avaya Proactive Contact to provide a custom agent desktop for Avaya Proactive Contact agents for handling of inbound and outbound calls delivered by Avaya Proactive Contact.

Information in these Application Notes has been obtained through DevConnect compliance testing and additional technical discussions. Testing was conducted via the DevConnect Program at the Avaya Solution and Interoperability Test Lab.

# 1. Introduction

These Application Notes describe the configuration steps required for Inisoft synTelate to interoperate with Avaya Proactive Contact using PG230 and call blending. In the compliance testing, synTelate used the Agent API from Avaya Proactive Contact to provide a custom agent desktop for Avaya Proactive Contact agents for handling of inbound and outbound calls delivered by Avaya Proactive Contact.

The synTelate solution consists of the synTelate Designer and the synTelate Agent. synTelate Designer is a graphical tool used to define the call flow and custom agent screen, which will run on the synTelate Agent. A subset of the Avaya Proactive Contact Agent API is used by synTelate Designer to obtain jobs, call lists, and data fields to facilitate the agent screen customization.

The Avaya Proactive Contact Agent API is used by synTelate Agent to obtain information such as job type, agent state, customer records fields and values from Avaya Proactive Contact to display on the customized agent desktop, and to request call control and customer record update functions initiated from the agent desktop, such as transfer call and set callback parameters.

The detailed administration of basic connectivity between Avaya Proactive Contact and Avaya Aura™ Communication Manager is not the focus of these Application Notes and will not be described. Furthermore, the detailed customization of the agent screen using synTelate Designer is also outside the scope of these Application Notes.

This compliance test used the Avaya Proactive Contact with PG230 deployment option. The results should be applicable to the Avaya Proactive Contact Standalone deployment option.

## 1.1. Interoperability Compliance Testing

The interoperability compliance test included feature and serviceability testing.

The feature testing focused on verifying proper display of the customized synTelate Agent with appropriate options, fields, and values for the following scenarios:

- Outbound and inbound calls.
- Outbound, managed, inbound, blend, and linked jobs.
- Intelligent Call Blending algorithm.
- Change password, and automatic enable/disable agent trace as part of agent login/logout.
- Log in, join job, go on/off break, leave job, and log off.
- Hold, reconnect, call transfer, conference, forward work, send/receive message, place manual call, agent drop, customer drop, and actions to lead to the equivalent of release line, and finish work.
- Set callback and update customer record fields.
- Use of Avaya Proactive Contact Supervisor to send/receive message with the agent, transfer agent between inbound and outbound jobs, and immediate and graceful stop of jobs while the agent is on an active call.

The serviceability testing focused on verifying the ability of synTelate to recover from adverse conditions, such as disconnecting/reconnecting the Ethernet cable to the synTelate Designer and to the synTelate Agent.

## 1.2. Support

Technical support on synTelate can be obtained through the following:

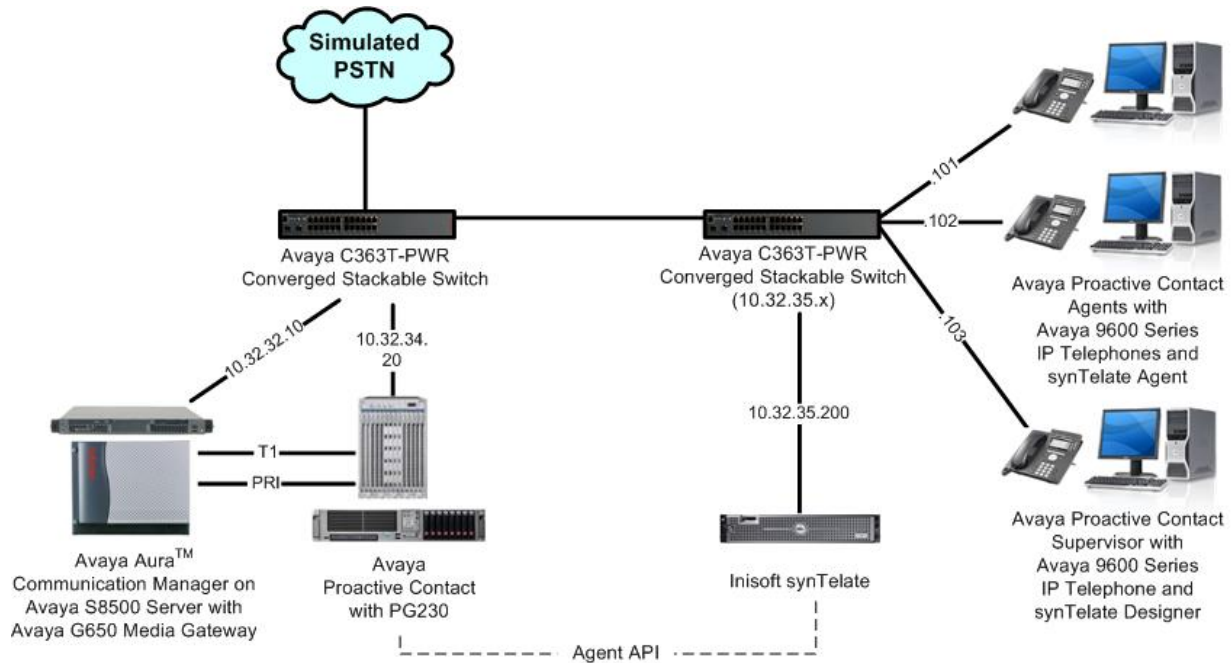
- **Phone:** (603) 383-4999 or +44 (0) 141-552-8800
- **Email:** [support@inisoft.co.uk](mailto:support@inisoft.co.uk)

## 2. Reference Configuration

The configuration used for the compliance testing is shown in **Figure 1**. In the compliance testing, synTelate used the Agent API to monitor and control outbound and inbound calls for the agents.

The table below shows the contact center devices on Communication Manager that were pre-defined and used in the testing.

Device Type	Extension
Supervisor Station	65000
Agent Station / Headset Number	65001, 65002



**Figure 1: synTelate with Proactive Contact using PG230 and Call Blending**

### 3. Equipment and Software Validated

The following equipment and software were used for the sample configuration provided:

Equipment	Software
Avaya Aura™ Communication Manager on Avaya S8500 Server	R015x.02.1.016.4
Avaya G650 Media Gateway <ul style="list-style-type: none"><li>• TN799DP C-LAN Circuit Pack</li></ul>	HW01 FW032
Avaya Proactive Contact with PG230	4.2
Avaya Proactive Contact Supervisor	4.2
Avaya 9600 Series IP Telephones (H.323)	3.1
synTelate Designer	4.1.6.0
synTelate Agent with <ul style="list-style-type: none"><li>• MosaixTelephonySvr.dll</li></ul>	4.1.6.0 4.1.8.0

## 4. Configure Avaya Proactive Contact

This section provides the procedures for configuring Avaya Proactive Contact. The procedures include the following areas:

- Obtain customer record fields
- Obtain completion codes

### 4.1. Obtain Customer Record Fields

Log in to the Linux shell of the Avaya Proactive Contact server. Navigate to the `/opt/avaya/pds/lists` directory to locate the configuration files for the calling lists used by the jobs.

In the compliance testing, the calling list “list1” was used for all jobs, and the call record fields for “list1” is defined in the `list1.fdict.cfg` file shown below. The customer record fields used for the testing were `ACCTNUM`, `BALANCE`, `NAME1`, `NAME2`, `ZIPCODE`, and `COMMENT1`. These field names were used by synTelate for customization of the agent screen.

```
$ more list1.fdict.cfg
RECLEN:740
ACCTNUM:16:C:ACCOUNT NUMBER:
BALANCE:10:$:BALANCE:
TOTALDUE:10:$:TOTAL DUE:
NAME1:25:C:NAME LINE1:
NAME2:25:C:NAME LINE2:
CITY:25:C:City:
STATE:2:C:State:
ZIPCODE:5:N:ZIPCODE:
PHONE1:12:C:HOME PHONE:
PHONE2:12:C:BUSINESS PHONE:
COMMENT1:60:C:COMMENT LINE 1:
AGENT:8:C:AGENT ID:
DTE:10:D:SYSTEM DATE:
TME:8:T:SYSTEM TIME:
CODE:3:C:COMPLETION CODE:
JOBNAME:20:C:Job Name:
COUNTER:3:N:RECORD ATTEMPT COUNTER:
ENTRYDATE:10:D:1ST DATE ON SYSTEM:
STATUSFLAG:1:C:RECORD STATUS:
RECALLNAME:30:C:RECALL NAME:
RECALLDATE:10:D:RECALL DATE:
--More-- (22%)
```

## 4.2. Obtain Completion Codes

Navigate to the `/opt/avaya/pds/config` directory to locate the completion code file `ag_cmd1.ky`. Make a note of the completion codes to be used, in this case **6**, **17**, **35**, **93**, and **98**, which will be used later to configure synTelate.

```
$ more ag_cmd1.ky
:::F1
:LOGOUT:::F2      Logout of job
:DIAL:::F3        Dial previewed record
:CANCEL:cancel_call:35:F4      Managed cancel call
:RELEASE:call_complete:89:F5    Managed non-connection
:RELEASE:pf_msg_1:20:F6 Play pre-recorded msg
:HOME:::F7        Goto first editable field
:RELEASE:call_complete:21:F8
:RELEASE:call_complete:22:F9
:RELEASE:call_complete:23:F10
:RECALL:::F11     Set recall
:RELEASE:call_complete:19:F12    Recall release
:DONE:::SF1       Release record
:CALL:::SF2       Field call
:HANGUP:::SF3     Manual hangup
:MCALL:::SF4      Manual call
:HOOKFLASH:::SF5    PBX Transfer call
:RELEASE:call_complete:16:SF6    Ringing phone
:RELEASE:call_complete:17:SF7  Cust hung-up in queue
:RELEASE:call_complete:24:SF8
:DIALDIGIT:::SF9    Dial pad enable
:EAR_VOLUME:::SF10  Adjust ear volume
:MOUTH_VOLUME:::SF11 Adjust mouth volume
:MASTER:::SF12    Agent assistant key
:HOLD:::CF1       Agent HOLD key
:UNHOLD:::CF2     Agent UNHOLD key
:MOFLASH_B:call_complete:6:CF3 Blind trans to INB
:MOFLASH_S:::CF4    Supv trans to INB
:::CF5
:::CF6
:RELEASE:call_complete:93:CF7  Sold Campaign
:::CF8
:RELEASE:call_complete:98:CF9  Agent owned recall
--More--(82%)
```

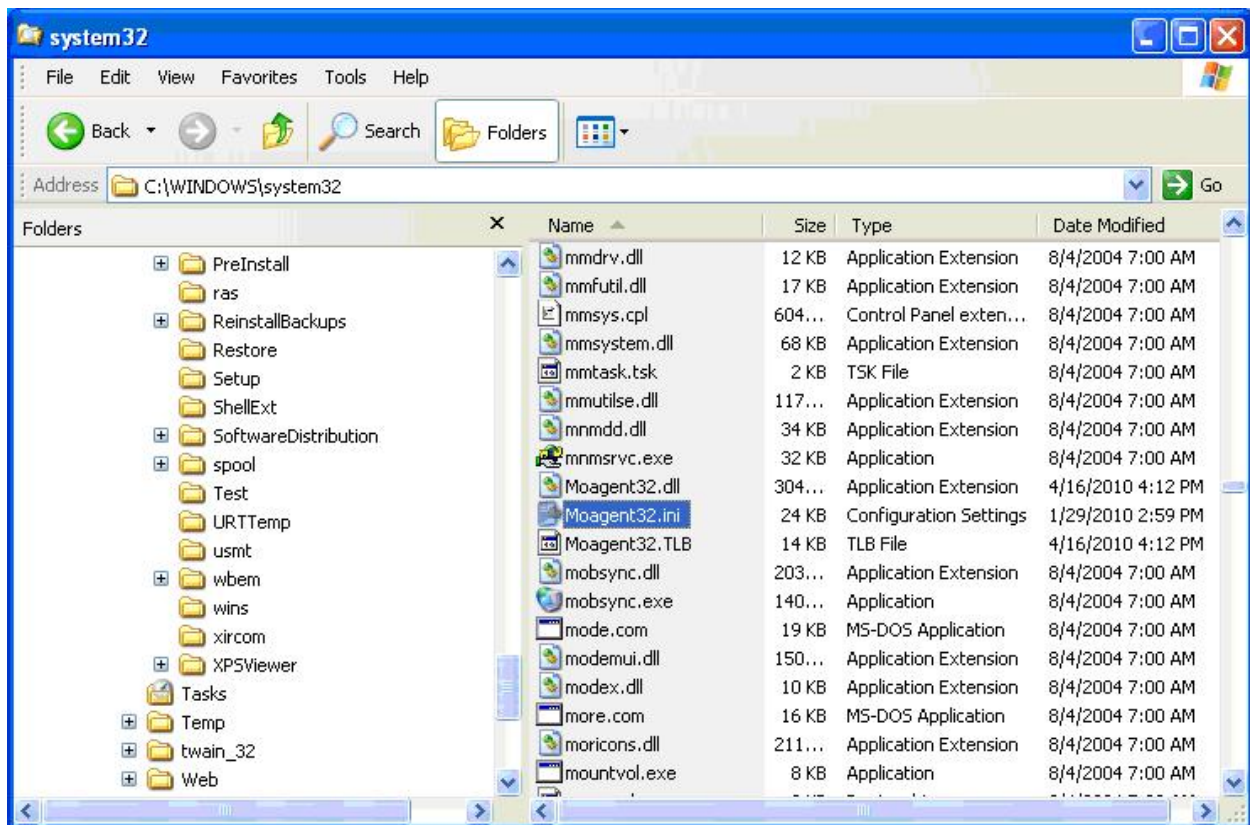
## 5. Configure synTelate Designer

This section provides the procedures for configuring synTelate Designer. The procedures include the following areas:

- Administer Moagent32.ini
- Launch Designer
- Administer campaigns
- Administer scripts and screens
- Administer CTI

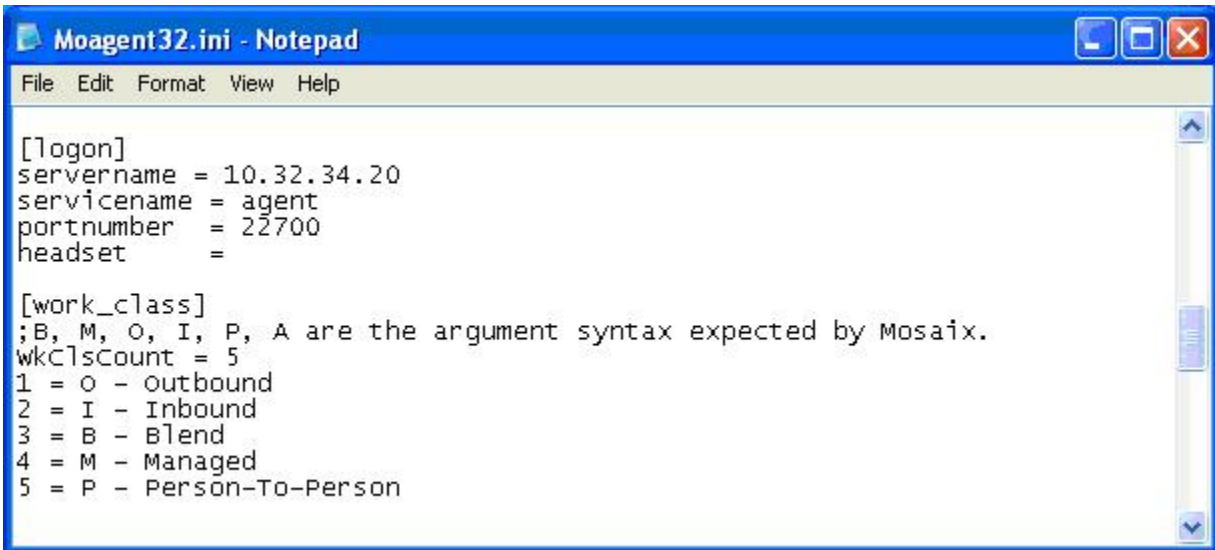
### 5.1. Administer Moagent32.ini

From the PC running Designer, navigate to the `C:\WINDOWS\system32` directory to locate the `Moagent32.ini` file shown below.





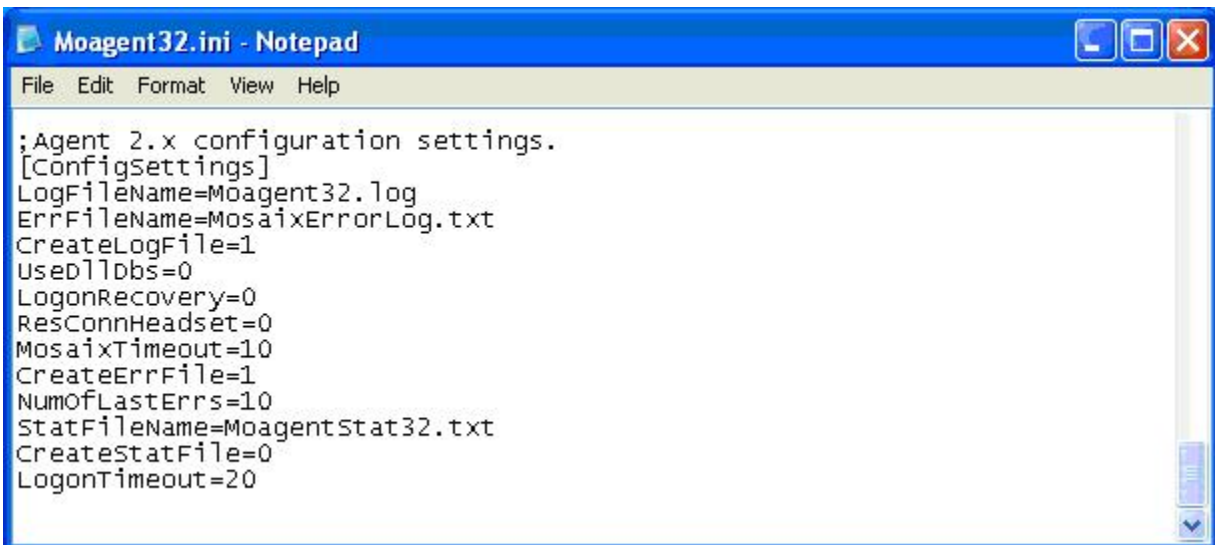
Open the **Moagent32.ini** file with the Notepad application. Scroll to the **logon** section, and set **Servername** to the IP address of Avaya Proactive Contact, as shown below.

A screenshot of a Notepad window titled "Moagent32.ini - Notepad". The window has a menu bar with "File", "Edit", "Format", "View", and "Help". The text content is as follows:

```
[logon]
servername = 10.32.34.20
servicename = agent
portnumber = 22700
headset =

[work_class]
;B, M, O, I, P, A are the argument syntax expected by Mosaix.
wkClsCount = 5
1 = O - Outbound
2 = I - Inbound
3 = B - Blend
4 = M - Managed
5 = P - Person-To-Person
```

Scroll down to the bottom of the file, and set **UseDlIDbs** to "0", as shown below. Select **File > Save As** from the top menu, and save the changed file to the **C:\WINDOWS** directory.

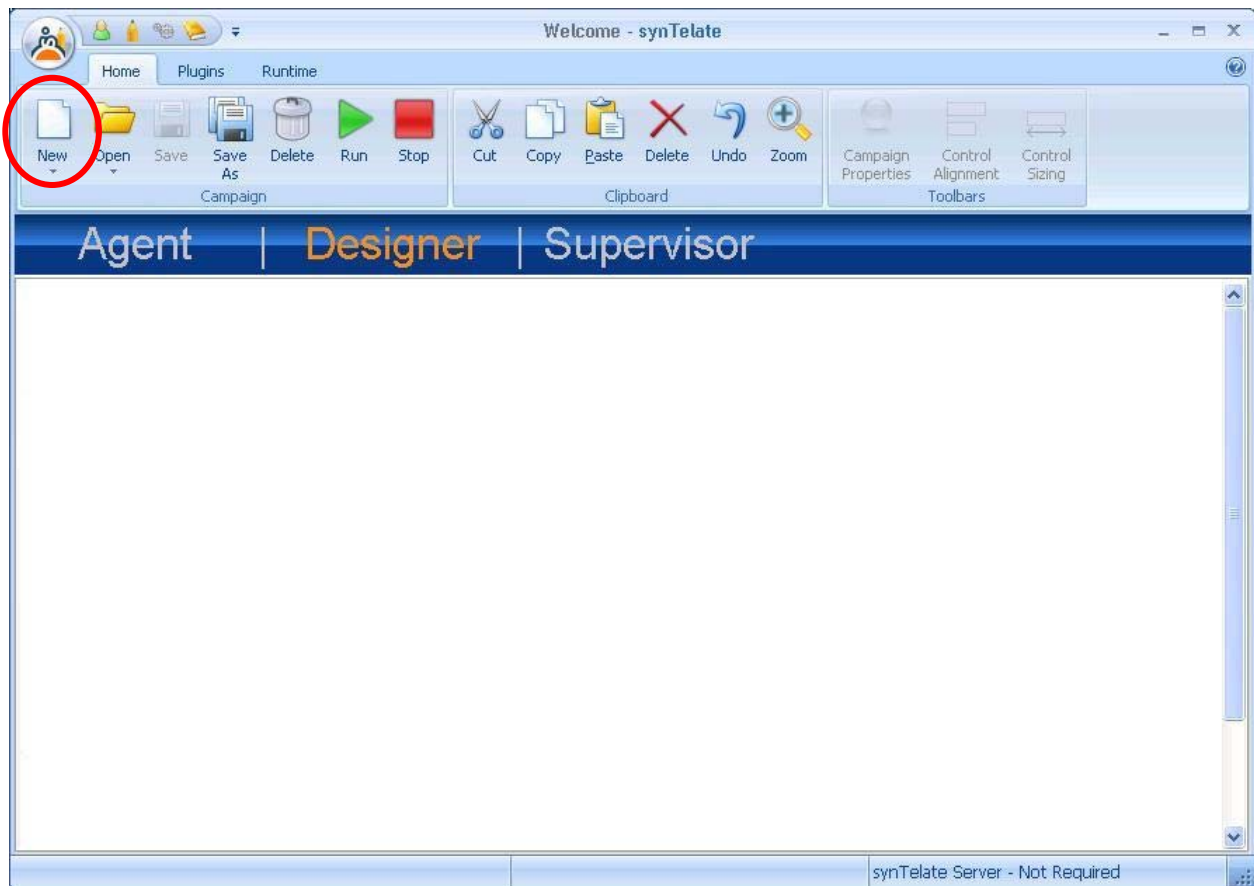
A screenshot of a Notepad window titled "Moagent32.ini - Notepad". The window has a menu bar with "File", "Edit", "Format", "View", and "Help". The text content is as follows:

```
;Agent 2.x configuration settings.
[ConfigSettings]
LogFileName=Moagent32.log
ErrFileName=MosaixErrorLog.txt
CreateLogFile=1
UseDlIDbs=0
LogonRecovery=0
ResConnHeadset=0
MosaixTimeout=10
CreateErrFile=1
NumOfLastErrs=10
StatFileName=MoagentStat32.txt
CreateStatFile=0
LogonTimeout=20
```

## 5.2. Launch Designer

From the PC running Designer, select **Start > Programs > synTelate > synTelate Designer** to display the **Welcome - synTelate** screen.

Select the **Designer** tab. From the top menu, select the **Home** tab. Click **New** and select **Wizard > Dialler Wizard** from the drop-down list (not shown below) to create a new campaign.



### 5.3. Administer Campaigns

The **Step 1 of 7** screen is displayed. Enter the following values for the specified fields, and retain the default values for the remaining fields.

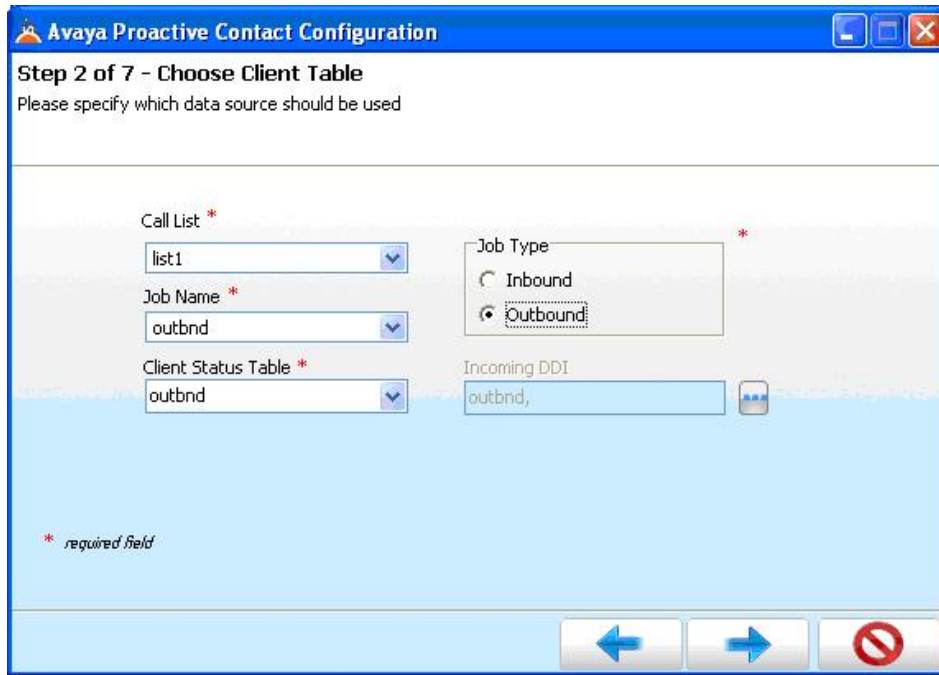
- **Database:** “sysRun”
- **Password:** The password for the database.
- **Name:** A descriptive name for the new campaign.

The screenshot shows a window titled "Avaya Proactive Contact Configuration" with a subtitle "Step 1 of 7 - Basic Campaign Details". Below the subtitle is the instruction "Please enter basic details for the campaign". The form contains several fields: "Database" (dropdown menu with "synRun" selected), "Name\*" (text box with "OutboundCampaign"), "Password" (text box with "\*\*\*\*\*"), "Description" (text box), "Start Date" (dropdown menu with "\_6/30/2010" selected), "End Date" (dropdown menu with "\_6/30/2011" selected), and "Notes" (text box). A legend at the bottom left indicates "\* required field". At the bottom right, there are three buttons: a left arrow, a right arrow, and a red prohibition sign.

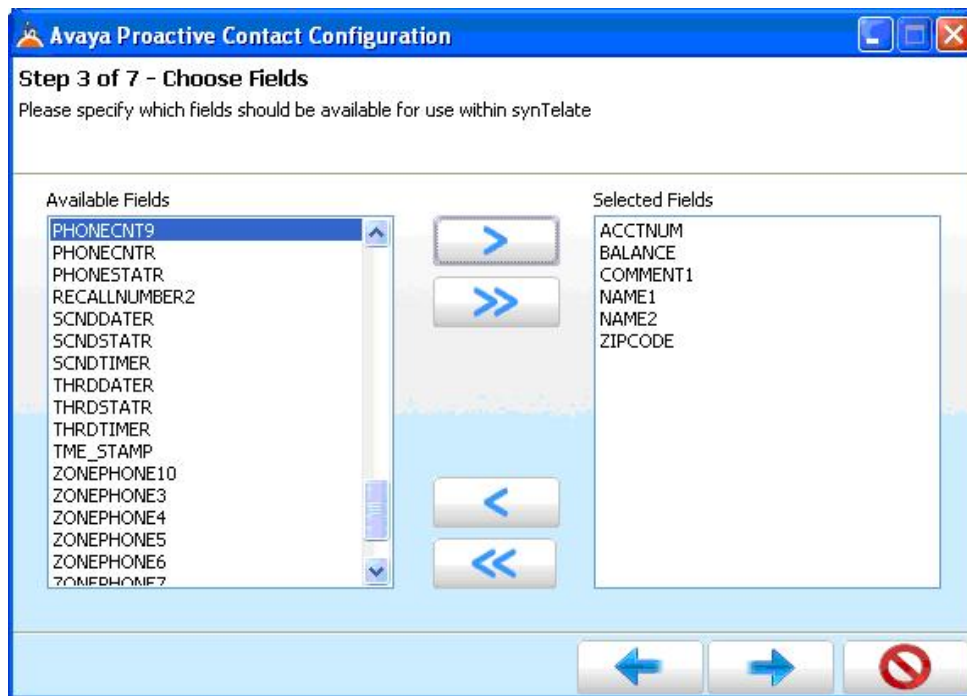
The **Avaya PCS Login** screen is displayed next. Enter the credentials for the Avaya Proactive Contact supervisor.

The screenshot shows a window titled "Avaya PCS Login". It contains three input fields: "Server" (dropdown menu with "Default" selected), "Agent Name" (text box), and "Password" (text box). At the bottom right, there are two buttons: a green checkmark and a red prohibition sign.

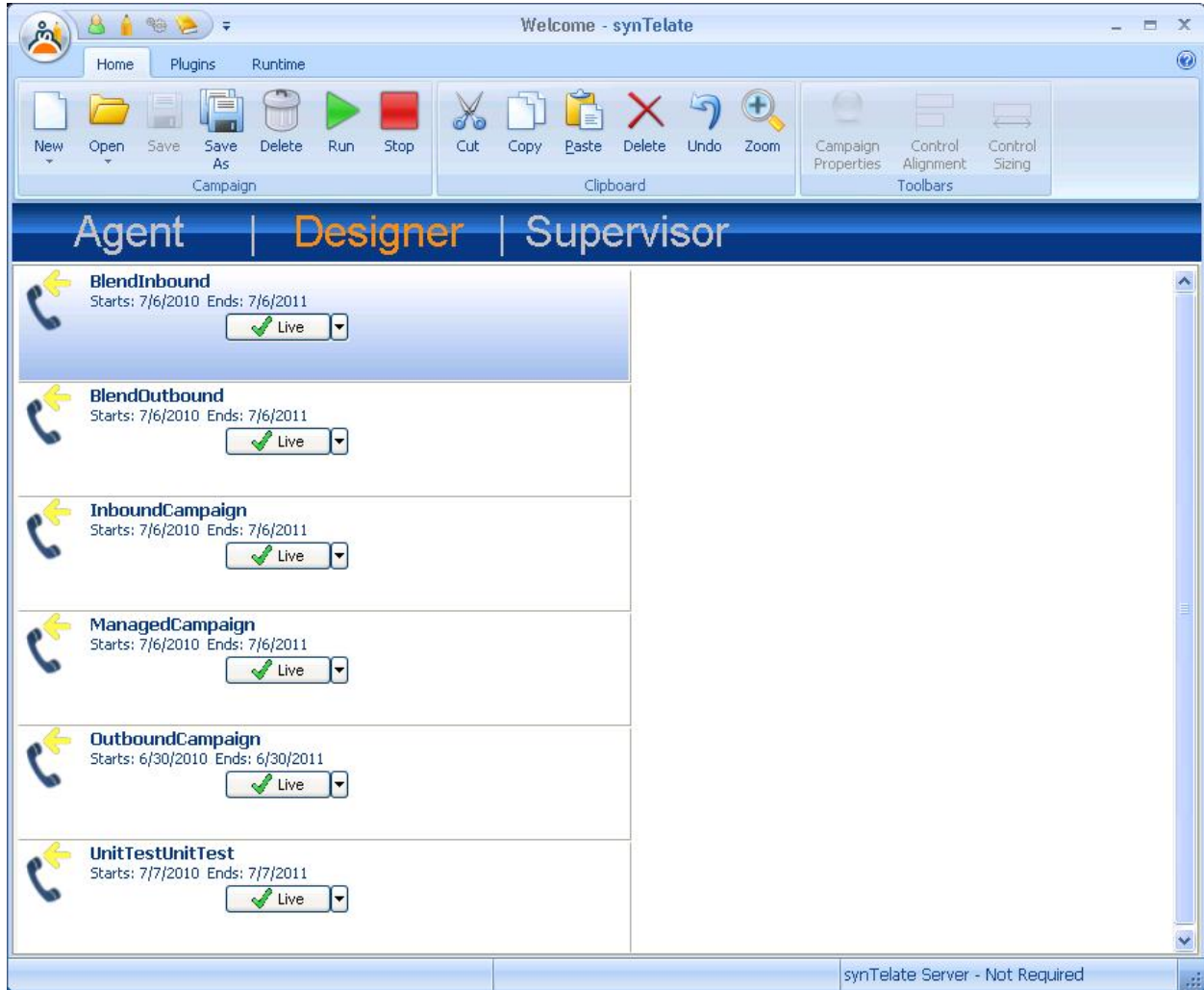
The **Step 2 of 7** screen is displayed. Select the proper values for **Call List** and **Job Name**. Retain the default value for **Client Status Table**, and select the proper **Job Type**. Note that when **Job Type** is “Inbound”, then **Incoming DDI** needs to be configured according to [2].



The **Step 3 of 7** screen is displayed next. Select the data fields from the left pane that correspond to the selected fields from **Section 4.1**. The screenshot below shows the data fields used in the compliance test. Retain the default values in all subsequent screens to complete the wizard.



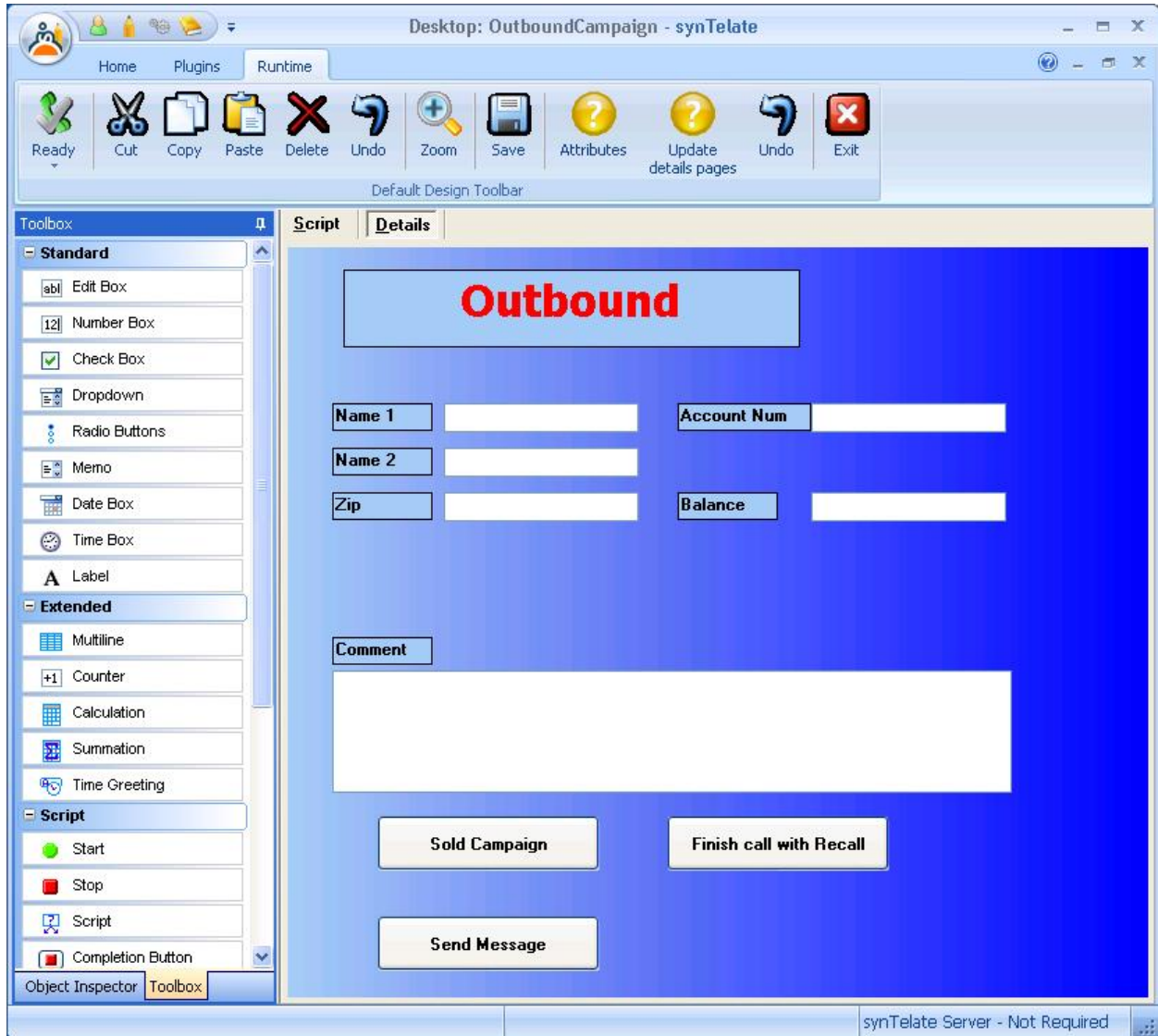
Repeat this section to create all desired campaigns. In the compliance testing, the campaigns below were created.



## 5.4. Administer Scripts and Screens

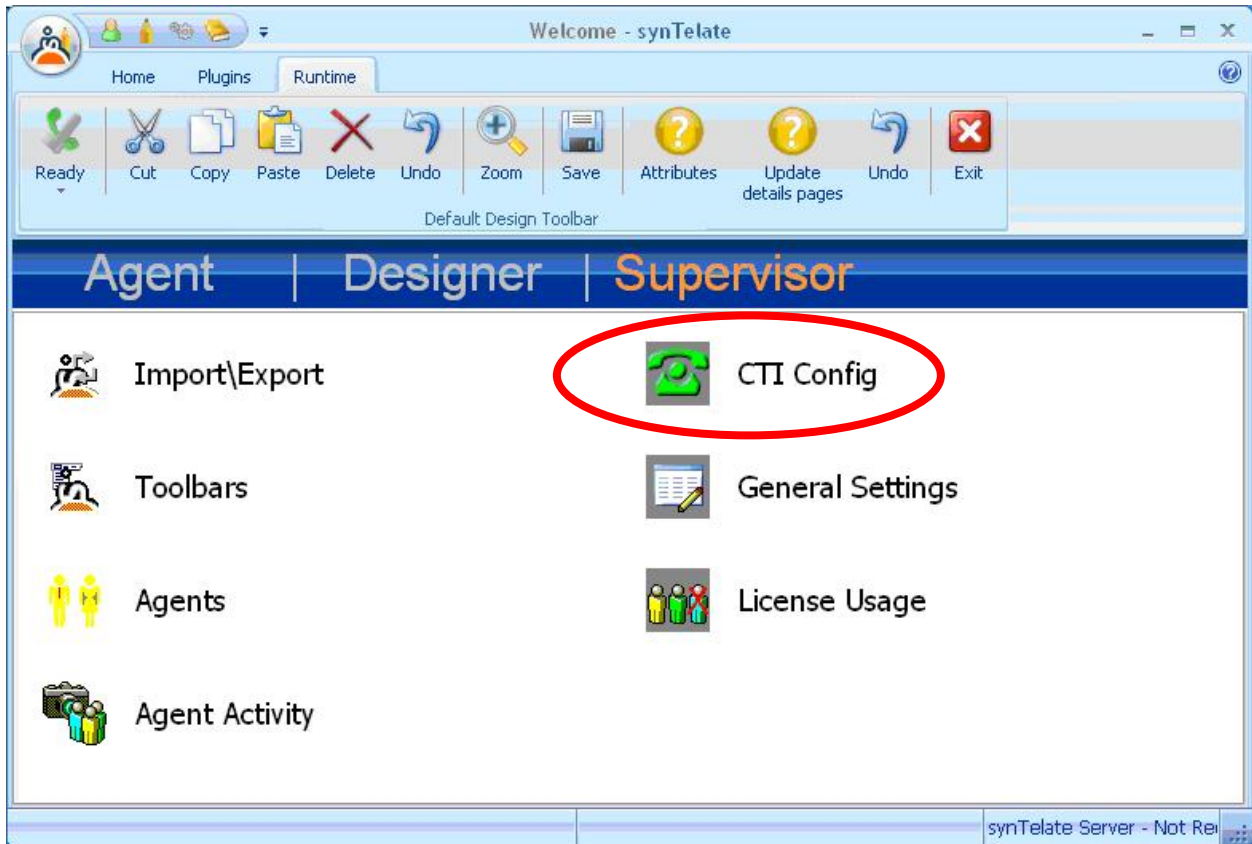
Follow [2] to administer call flow scripts and data screens for each campaign in **Section 5.3**. The screenshot below shows a sample customized data screen for the outbound campaign used in the testing.

The customer record fields from **Section 4.1** and the completion codes from **Section 4.2** were used in administering the data screens.

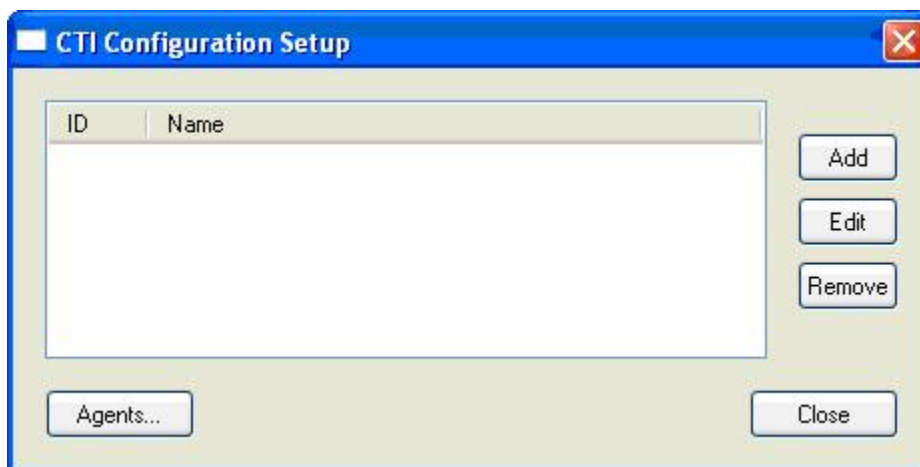


## 5.5. Administer CTI

Select the **Supervisor** tab, and click on **CTI Config**.



The **CTI Configuration Setup** screen is displayed. Click **Add**.



The **Edit CTI Config Details** screen is displayed. Enter a descriptive **Name**. For **Telephony Server**, select “Avaya PDS” from the drop-down list. Check **Enabled for undefined Agents**, as shown below.

**Edit CTI Config Details**

Name  
PC42 Hard Dialer

Telephony Server  
Avaya PDS

Auto Login

Enabled for undefined Agents

External Prefix

Extension Length

Ring Delay

Pass Through Telephony Server

OK Cancel



## 6. General Test Approach and Test Results

The feature test cases were performed both automatically and manually. Outbound calls were automatically placed and delivered to synTelate Agent by Avaya Proactive Contact, and inbound calls were manually placed.

Different types of jobs were exercised, along with different actions initiated from synTelate Agent, to verify proper generation and handling of supported messages from the Avaya Proactive Contact Agent API.

The Avaya Proactive Contact Supervisor was used to start/stop jobs, send/receive messages with agents, and to transfer agents between jobs.

The serviceability test cases were performed manually by disabling/enabling the Ethernet connection to synTelate Designer and to synTelate Agent.

The verification included checking the display of fields, options, and values on synTelate Agent, and checking the exchanged API messages in the designer and agent logs.

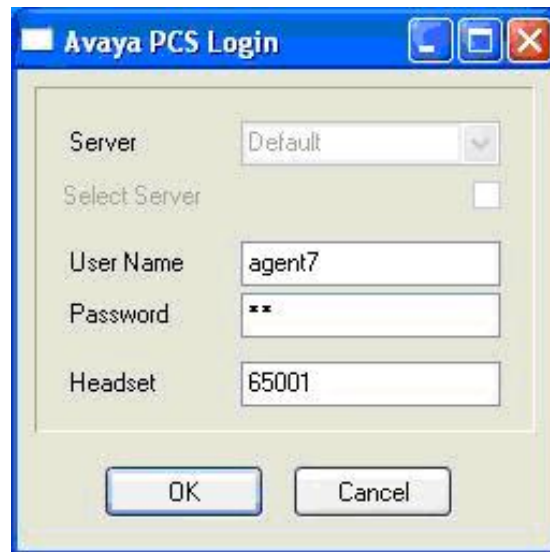
All test cases were executed. The one observation from the compliance test is that the synTelate Agent does not display any message related to a link interruption, and agents will receive errors upon completing the current customer record. The workaround is for the agent to manually exit from synTelate Agent and to manually drop the telephone connection to Avaya Proactive Contact.

## 7. Verification Steps

This section provides the tests that can be performed to verify proper configuration of synTelate and Avaya Proactive Contact. Prior to verification, start an outbound job on Avaya Proactive Contact.

### 7.1. Verify synTelate


From the PC running synTelate Agent, select **Start > Programs > synTelate > synTelate Agent**. The **Avaya PCS Login** screen is displayed. Enter the pre-defined agent login and password for Avaya Proactive Contact, and the agent station / headset number from **Section 2**.



The image shows a Windows-style dialog box titled "Avaya PCS Login". It contains the following fields and controls:

- Server:** A dropdown menu currently set to "Default".
- Select Server:** A checkbox that is currently unchecked.
- User Name:** A text input field containing "agent7".
- Password:** A text input field containing two asterisks (\*\*).
- Headset:** A text input field containing "65001".
- Buttons:** "OK" and "Cancel" buttons at the bottom.

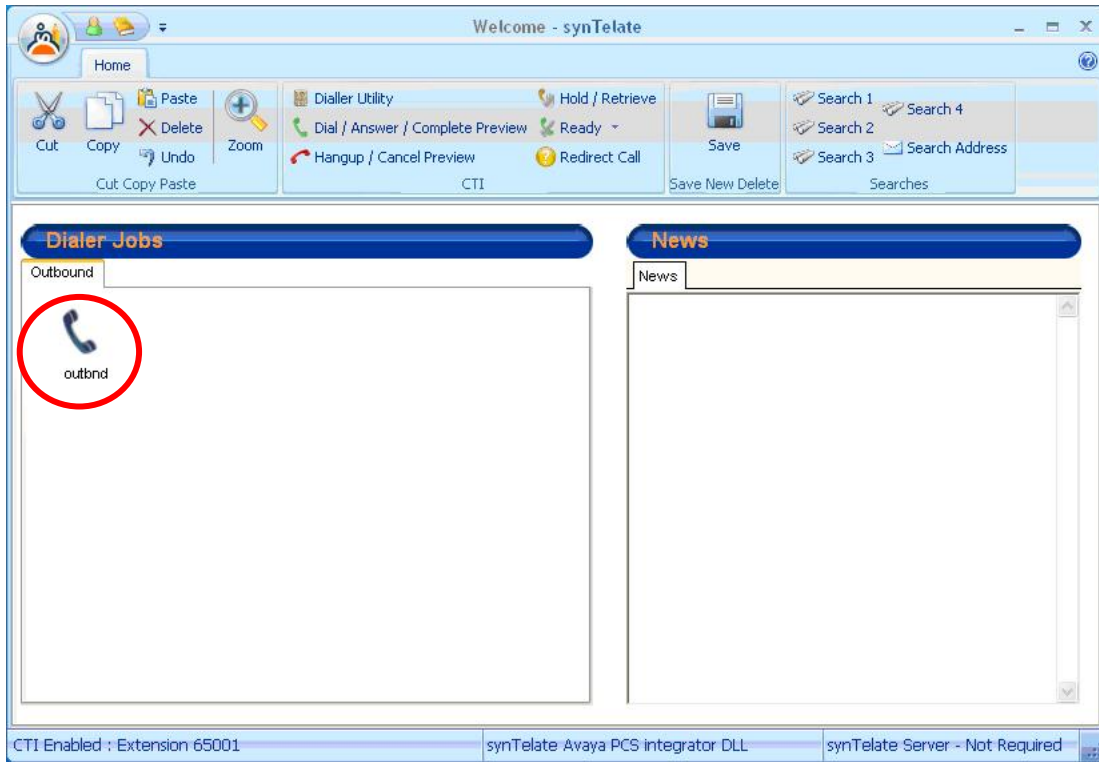
The **Select a CTI Config** screen is displayed next. Select the CTI from **Section 5.5**, as shown below.



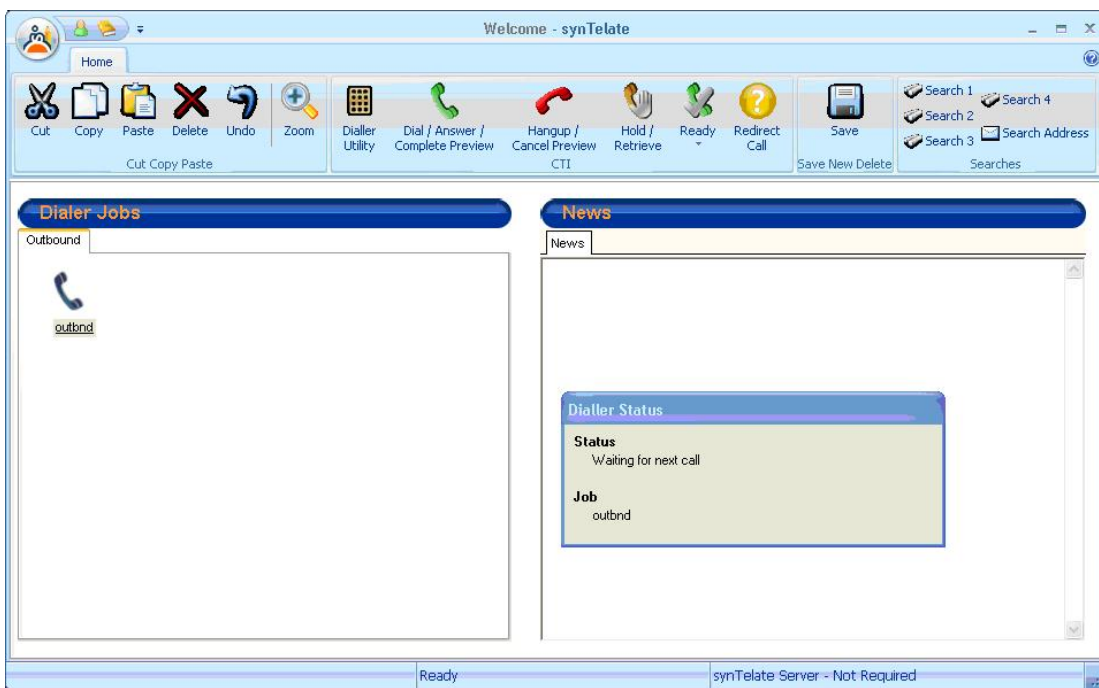
The image shows a Windows-style dialog box titled "Select a CTI Config". It contains the following elements:

- Text:** "Please select a Telephony Configuration to use".
- List:** A list box containing one item, "PC42 Hard Dialer", which is currently selected.
- Buttons:** "OK" and "Cancel" buttons at the bottom.

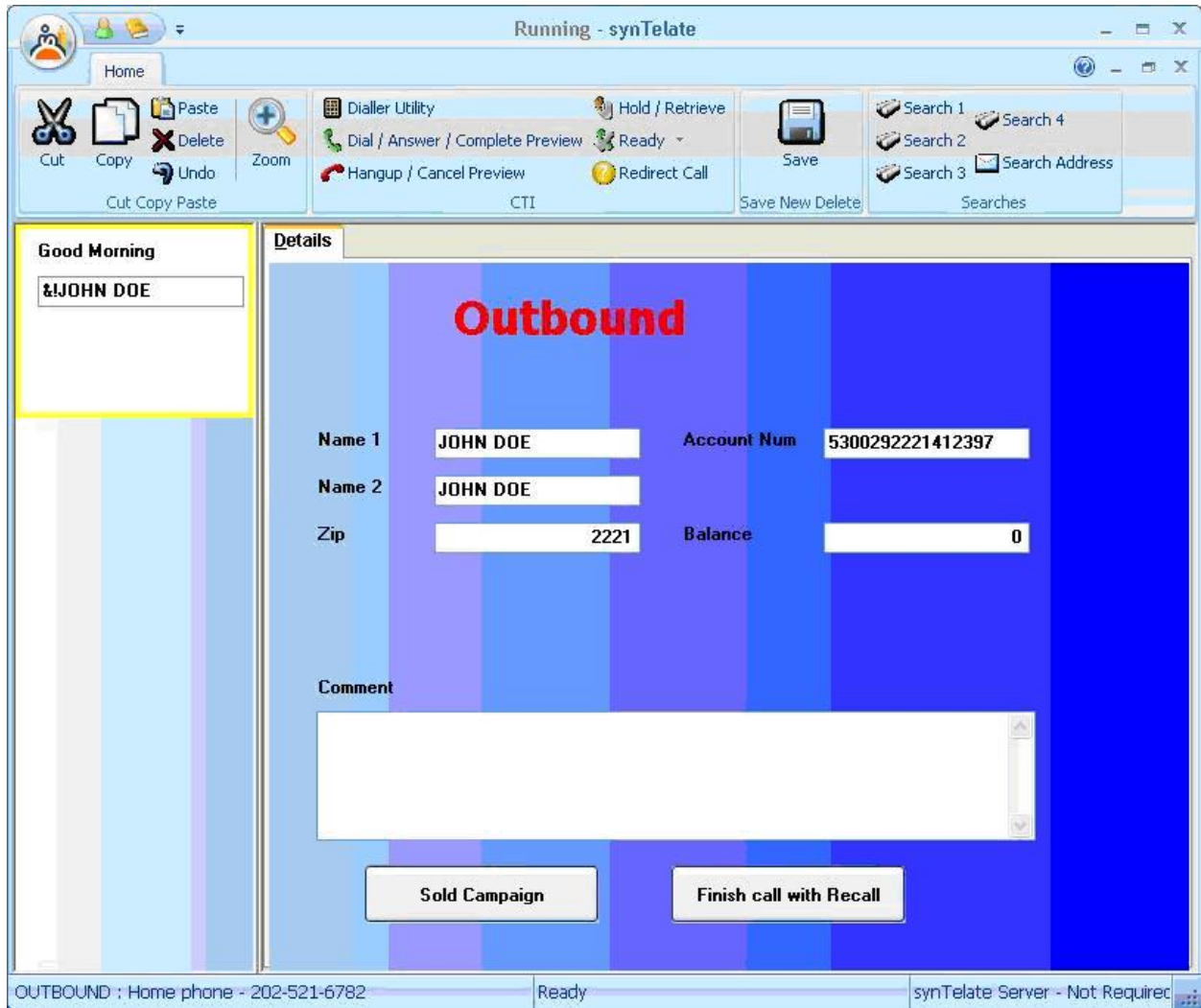
The **Welcome - synTelate** screen is displayed. Verify the active outbound job is displayed. Click **outbnd**.



The **Dialer Status** box is displayed in the right pane. Verify the values for **Status** and **Job**, as shown below.



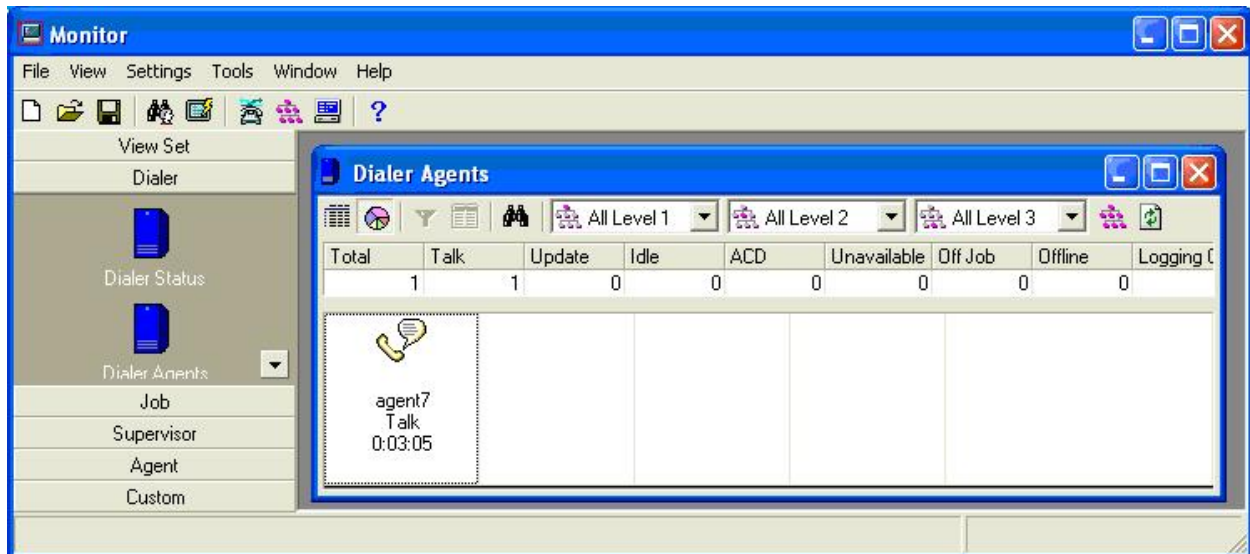
The **Running - synTelate** screen is displayed. When an outbound call is delivered to the agent, verify that the appropriate data screen from **Section 5.4** is displayed and populated with values retrieved from the customer record, as shown below.



## 7.2. Verify Avaya Proactive Contact

From the PC running the Avaya Proactive Contact Supervisor, select **Start > All Programs > Avaya > Proactive Contact 4.2 > Supervisor > Monitor**, and log in with the appropriate credentials.

The **Monitor** screen is displayed. Select **Dialer > Dialer Agents** from the left pane, to display the **Dialer Agents** screen. Verify that the agent from **Section 7.1** is displayed and in the “Talk” state.



## 8. Conclusion

These Application Notes describe the configuration steps required for synTelate to successfully interoperate with Avaya Proactive Contact with PG230 using call blending. All feature and serviceability test cases were completed, with observations noted in **Section 6**.

## 9. Additional References

This section references the product documentation relevant to these Application Notes.

1. *Administering Avaya Proactive Contact*, Release 4.2, May 2010, available at <http://support.avaya.com>.
2. *synTelate Training Manual*, Version 4.01, Issue 0.1.02, available as part of the synTelate training course.
3. *Agent Helpfile for synTelate version 4.01 with Avaya PCS*, Version 4.01, Issue 1.0, available from the synTelate Agent installation CD.

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