Avaya Solution & Interoperability Test Lab

Application Notes for Initiative Software synTelate with Avaya IP Office - Issue 1.0

Abstract

These Application Notes describe the configuration steps required for Initiative Software synTelate to successfully interoperate with Avaya IP Office. The objective of the test was to evaluate interoperability of the above products in a contact center, handling predictive outbound and inbound calling campaigns, as well as agent blending. 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.

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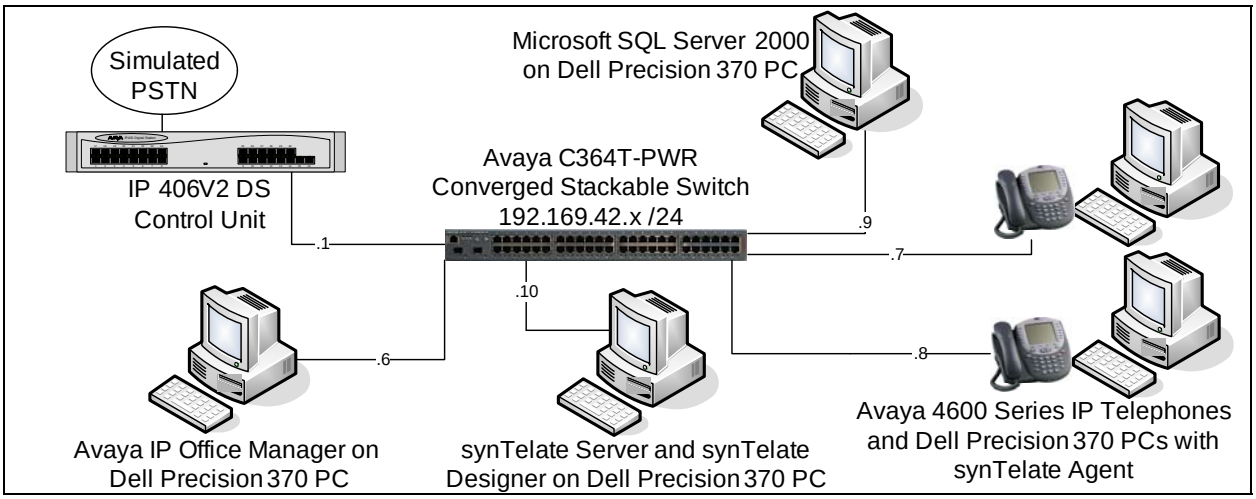
1. Introduction

These Application Notes describe the configuration steps required for Initiative Software synTelate to successfully interoperate with Avaya IP Office.

synTelate is a call center scripting application for creating inbound and outbound campaigns. For the compliance testing, synTelate was integrated with Avaya IP Office using Computer Telephony Integration (CTI) over the Telephony Application Programmer Interface (TAPI). The diagram below shows the configuration used for the compliance testing.



The synTelate Designer application is used to administer synTelate including the agents, campaigns, and the CTI link and stores this information in a Microsoft SQL Server 2000 database. Each instance of the synTelate Agent application retrieves this information from the database on login and establishes a TAPI link to Avaya IP Office.

For inbound campaigns, Avaya IP Office routes the calls using call center features and synTelate monitors the agent phones allowing the agent to answer and control calls using the synTelate Agent application. synTelate routes outbound contacts to the synTelate Agent application using two outbound pacing modes, as follows.

- **Preview Dial:** The contact is routed to the agent who has to accept it manually before the application dials the contact's number.
- **Power Dial:** The application starts dialing the contacts' number as soon as the contact is routed to the agent.

synTelate can also operate in blend mode, passing outbound contacts to agents when there are no queuing inbound contacts.

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2. Equipment and Software Validated

The following equipment and software were used for the compliance testing.

Equipment	Software
Avaya IP 406V2 DS Control Unit	Avaya IP Office 4.0(5)
Avaya 4610 IP Telephones (H.323) Avaya 4602 IP Telephones (H.323) Avaya 4620 IP Telephones (H.323)	2.3 2.3 2.3
Dell Precision 370 PC	Windows XP Professional, Service Pack 1 synTelate Server 3.0, Service Pack 4 synTelate Designer 3.0, Service Pack 4
Dell Precision 370 PCs	Windows XP Professional, Service Pack 1 synTelate Agent 3.0, Service Pack 4
Dell Precision 370 PC	Windows XP Professional, Service Pack 1 Microsoft SQL Server 2000

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3. Configure Avaya IP Office

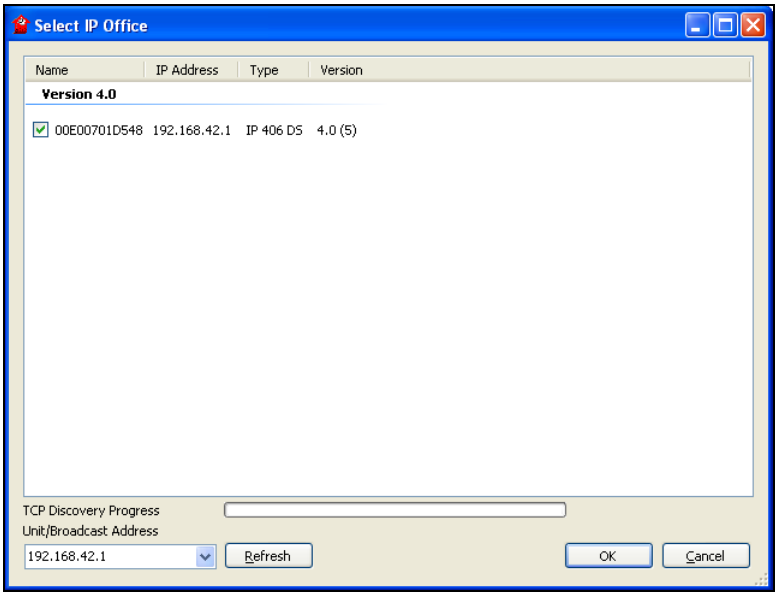
This section provides the procedures for configuring Avaya IP Office. The procedures include the following areas.

- License Avaya IP Office.
- Save the Avaya IP Office configuration.

Please note that it is expected that the installer is familiar with configuring users, hunt groups, short codes, etc. on Avaya IP Office as the focus of these Application Notes is on the configuration of the TAPI interface only. For all other provisioning information, such as software installation, installation of optional components, basic configuration of Avaya IP Office, etc., refer to the Avaya IP Office product documentation in reference [1].

3.1. License Avaya IP Office

Log into the Avaya IP Office Manager PC and go to **Start > Programs > IP Office > Manager** to launch the Avaya IP Office Manager application. Go to **File > Open Configuration** to bring up the Select IP Office dialog box. Select the IP Office system by checking the system name as seen below. In this case, there is only one system to select from.



Log into the Avaya IP Office Manager application by using the appropriate user name and password (not shown).

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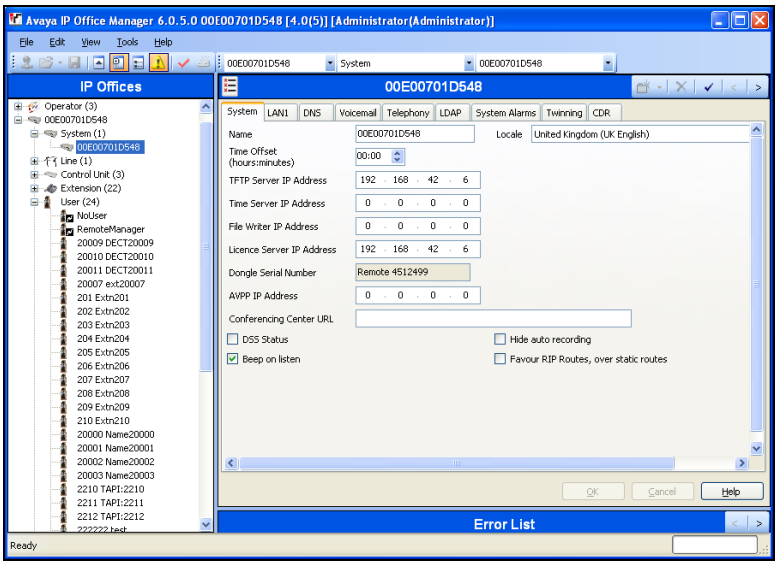
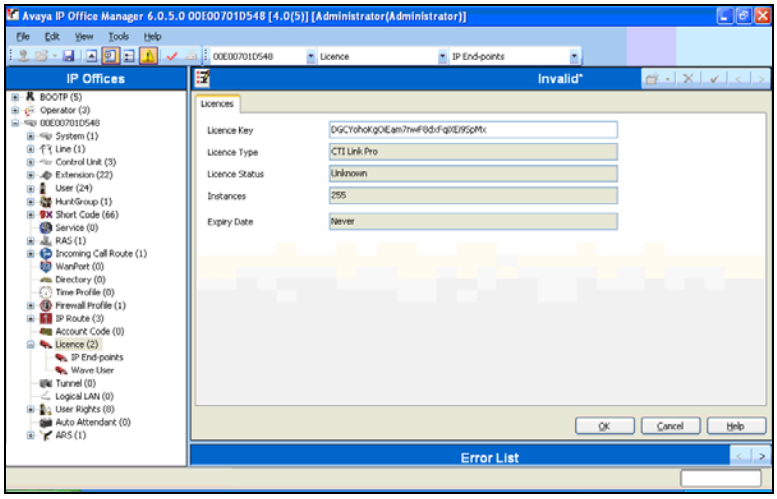
Ensure that the Avaya IP Office serial license dongle is connected to the Avaya IP Office Manager PC. In the Avaya IP Office Manager window, go to the left panel Configuration Tree and click **System**. Click the **System** Tab on the right panel. The **Dongle Serial Number** field should be populated with the dongle number previously plugged into the Avaya IP Office Manager PC. Enter the IP address of the Avaya IP Office Manager PC in the **License Server IP Address** field and click **OK**.



The CTI Link Pro license is required for synTelate to connect to Avaya IP office via TAPI.To add the license, in the Avaya IP Office Manager window, go to the Configuration Tree, right-click **License** and select **New** from the drop-down menu**.** Enter the license code for the CTI Link Pro license (or cut and paste from notepad) into the **License Key** field and click **OK**.



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3.2. Save the Avaya IP Office Configuration

In the Manager window, select **File > Save Configuration**. The configuration to Avaya IP Office is saved at this point and will require a reboot of Avaya IP Office. This completes configuration of Avaya IP Office.

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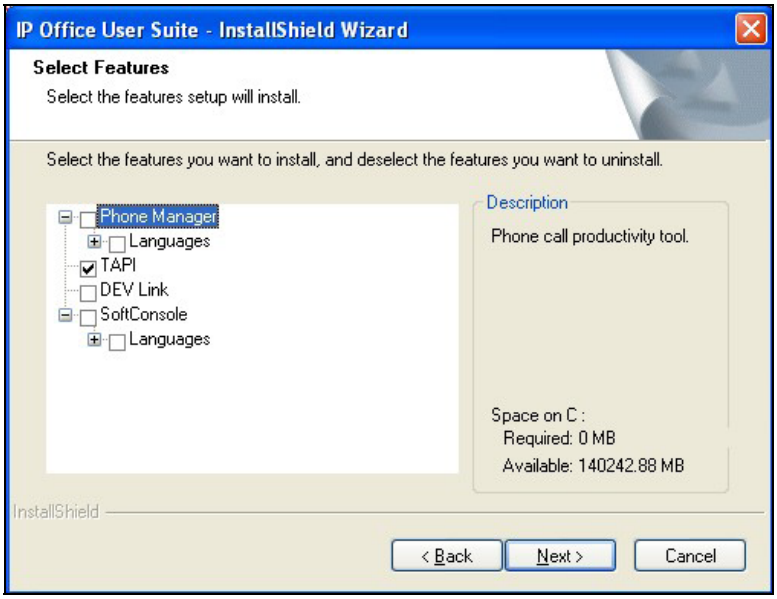
4. Configure Avaya TAPI Driver

This section provides the procedures for configuring the Avaya TAPI Driver on synTelate Agent PCs. The procedures include the following areas.

- Install Avaya TAPI driver
- Configure Avaya TAPI driver

4.1. Install Avaya TAPI Driver

Log into a synTelate Agent PC with administrative privileges and start the IP Office User Suite installation. The automatic process displays the screen below. Check **TAPI** to install the Avaya IP Office TAPI driver on the PC. Click **Next** to complete the installation of the Avaya IP Office User Suite. At the InstallShield Wizard Complete window, click **Finish.**



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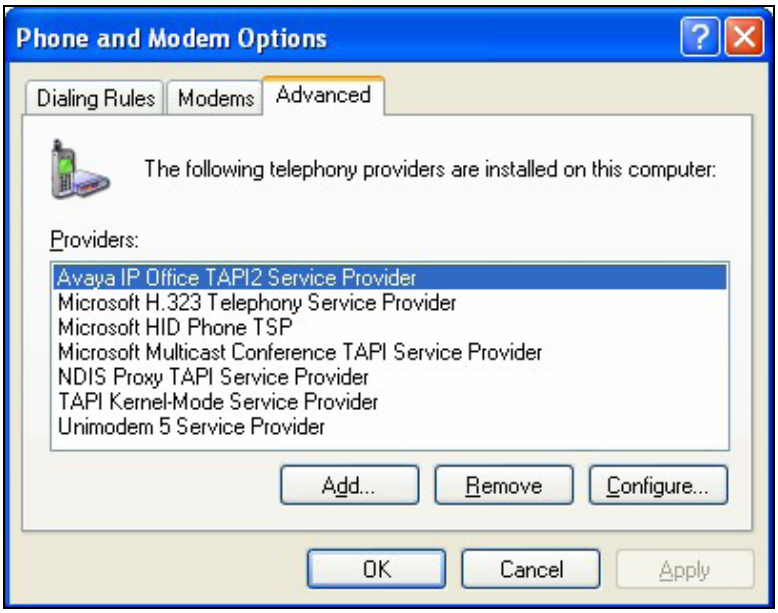
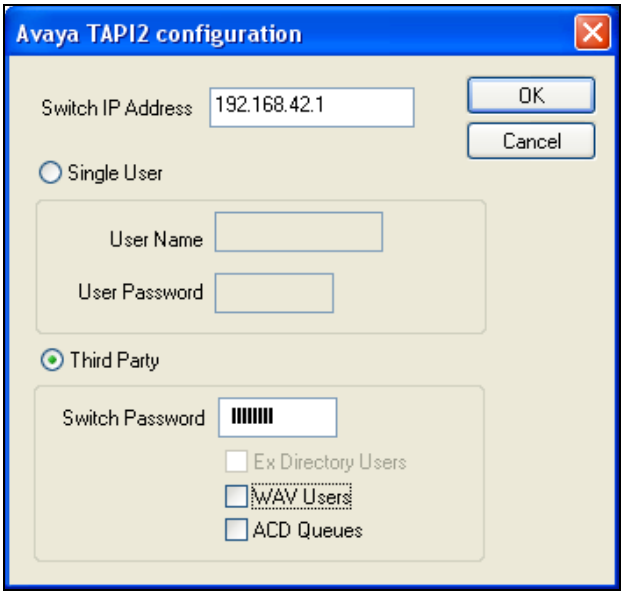
4.2. Configure Avaya TAPI Driver

Go to the Windows Control Panel and open **Phone and Modem Options**. Click the **Advanced** tab, select **Avaya IP Office TAPI2 Service Provider** and click **Configure…**.



In the Avaya TAPI2 configuration window that is displayed, set **Switch IP Address** to the IP address of Avaya IP Office, select **Third Party** and set **Switch Password** to the IP Office password. Click **OK**.



In the Phone and Modem Options window, click **OK**. Reboot the PC for the new changes to take effect.

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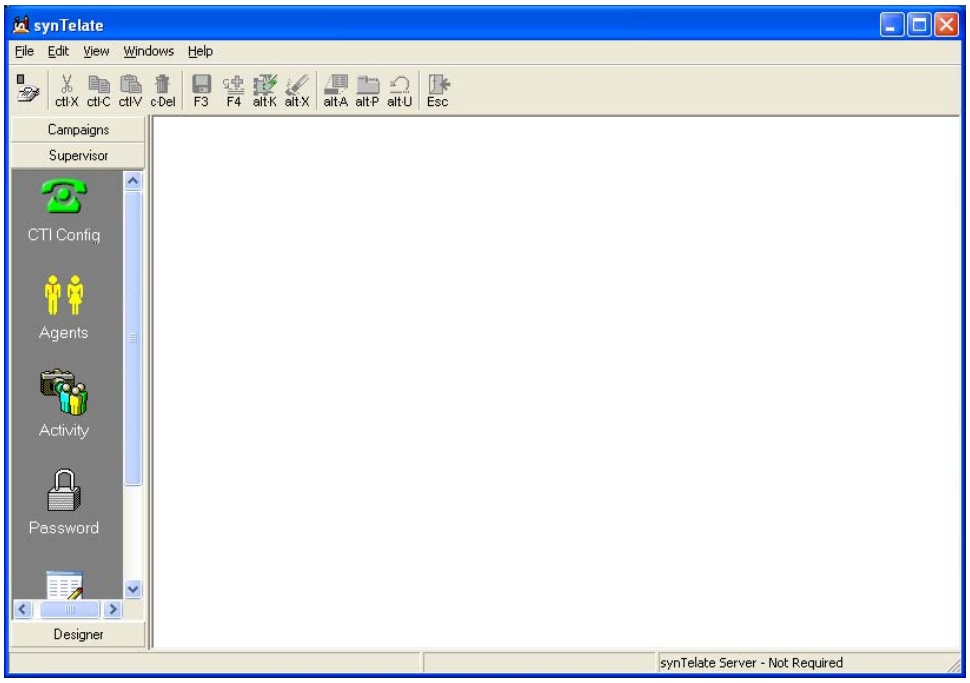
5. Configure synTelate

This section provides the procedures for configuring the synTelate TAPI interface using synTelate Designer.

Please note that it is expected that the installer is familiar with configuring the database connection as well as agents, campaigns etc. on synTelate as the focus of these Application Notes is on the configuration of the TAPI interface only. For all other provisioning information, such as software installation, installation of optional components, basic configuration of synTelate, etc., refer to the synTelate product documentation in reference [2].

5.1. Administer CTI using synTelate Designer

Select **Start → Programs → synTelate → synTelate Designer**. In the left pane click the **Supervisor** tab and select **CTI Config**.



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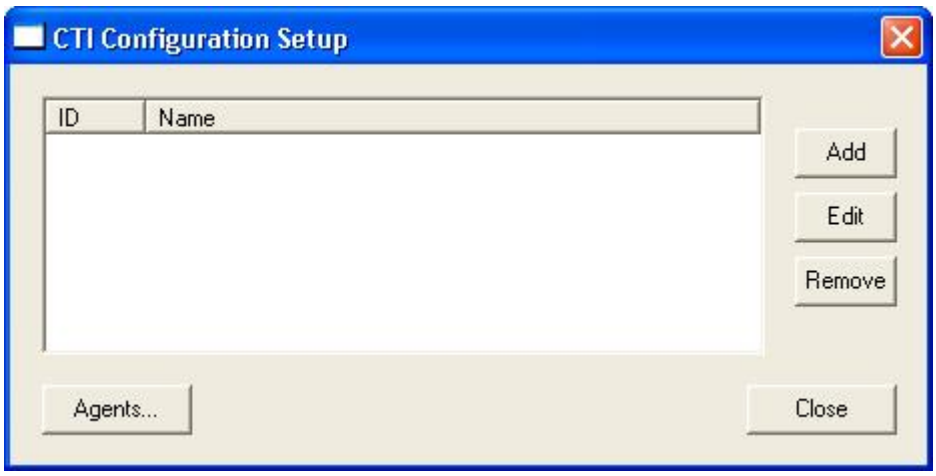
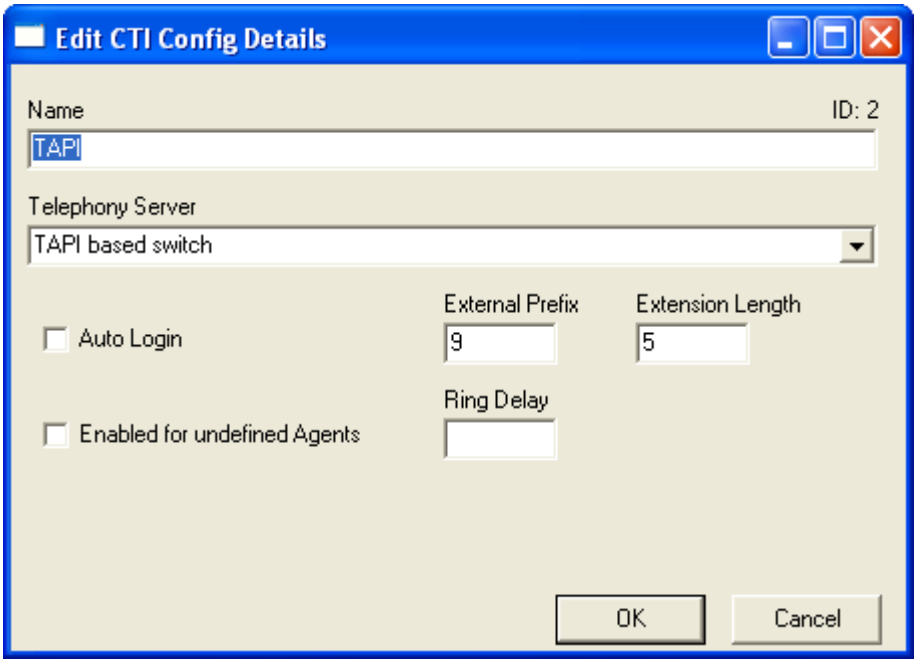
Click the **Add** button in the CTI Configuration Setup box.



In the Edit CTI Config Details dialog box, configure the fields as follows.

- **Name:** Enter a descriptive name.
- **Telephony Server:** Select **TAPI based switch** from the drop down list.
- **External Prefix:** Enter the Avaya IP Office short code for Automatic Route Selection.
- **Extension Length:** Enter the number of digits used for the Avaya IP Office extensions.

The rest of the fields may be left at their defaults. Click **OK** when completed.



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6. Interoperability Compliance Testing

The interoperability compliance test included both feature and serviceability testing.

The feature testing focused on verifying synTelate's handling of TAPI messages to request and respond to Avaya IP Office features. The features tested included using the synTelate Agent application for initiating, receiving and controlling calls and handling inbound, outbound and blended campaigns.

The serviceability testing focused on verifying synTelate's ability to recover from an outage condition, such as busying out the CTI link and disconnecting the Ethernet cable for the CTI link.

Performance of synTelate under load was not tested.

6.1. General Test Approach

All feature and serviceability test cases were performed manually. The verification included checking proper states at the telephone sets, and viewing TAPI message traces on synTelate.

6.2. Test Results

All tests passed. The synTelate agent application successfully ran inbound and outbound campaigns

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7. Verification Steps

The following steps may be used to verify the configuration.

- Verify the CTI Link Pro license is enabled on Avaya IP Office (see **Section 3.1**).
- Log an agent into an inbound campaign and make the agent available. Place a call incoming call to the inbound campaign. Verify that the agent's phone rings and the correct campaign information pops up.
- Log an agent into an outbound campaign and make the agent available. Verify that the correct campaign information pops up and that the agent application is able to make the outbound call.

8. Support

Technical support for the synTelate application is available as follows:

- Telephone Help Desk Tel: +44 (0)141 552 8800 or 0800 052 1015
- Support on the Web - http://support.inisoft.co.uk/start.asp. If a login is required contact support@inisoft.co.uk

9. Conclusion

These Application Notes describe the configuration steps required for Initiative Software synTelate to successfully interoperate with Avaya IP Office. All test cases were completed successfully and the configuration described in these Application Notes has been successfully compliance tested.

10. Additional References

This section references the product documentations that are relevant to these Application Notes.

[1] *IP Office 4.0 Installation Manual*, Document ID 15-601042, Issue 15e, January 2007, available at:
http://support.avaya.com.

[2] synTelate product documentation is available on request from Initiative Software.
- Company website:- www.inisoft.co.uk
- Product website:- www.syntelate.com

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