



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

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# **Application Notes for Avaya Proactive Contact R5.0.1 with Inisoft synTelate R4.3 using CTI and Proactive Agent Blending – Issue 1.0**

### **Abstract**

These Application Notes describe the configuration steps required for Inisoft synTelate R4.3 to successfully interoperate with Avaya Proactive Contact R5.0.1 using Computer Telephony Interface. Inisoft synTelate is a call center scripting application for creating inbound and outbound campaigns and consists of the synTelate Designer and the synTelate Enterprise Agent. Inisoft synTelate Enterprise Agent was compliance tested against Avaya Proactive Contact R5.0.1 using Computer Telephony Interface.

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

# 1. Introduction

These Application Notes describe a compliance-tested configuration comprised of Avaya Proactive Contact R5.0.1 using Computer Telephony Interface Dialer (Sofdialer) and Inisoft synTelate R4.3 (synTelate). Avaya Proactive Contact uses a Telephony Server Application Programming Interface (TSAPI) link with Avaya Aura® Application Enablement Services (AE Services).

Inisoft synTelate is a call center scripting application for creating inbound and outbound campaigns, and consists of the Inisoft synTelate Designer and the Inisoft synTelate Agent. Inisoft synTelate Designer is a graphical tool that is used for the definition of the call flow and agent screens. Inisoft synTelate database consists of client records that are used during inbound and outbound campaigns which are imported from Avaya Proactive Contact. Inisoft synTelate Agent uses Avaya Proactive Dialer Agent API (Agent API) to communicate with Avaya Proactive Contact. This allows Inisoft synTelate to perform operations such as logging in and out the agent, joining a job, changing the agent state, handling calls and setting completion codes. Inisoft synTelate uses a TSAPI link to Avaya Aura® Application Enablement Services to receive inbound call events and to control the call (answer, hold, retrieve, hangup, etc.).

During compliance testing, Outbound, Managed, and Proactive Agent Blending (PAB) campaign types were run. Outbound campaign focuses only on outbound calls initiated by the dialer. Managed campaign is a special type of Outbound campaign where the agent releases the call to be dialed after reviewing the customer information.

PAB campaign can handle both outbound and inbound calls but it focuses on outbound calls releasing agents when an inbound call enters the monitored hunt group queue on Avaya Aura® Communication Manager. Proactive Agent Blending is achieved with a Computer Telephony Interface (CTI) link configured between Avaya Proactive Contact and Avaya Aura® Application Enablement Services.

## 2. General Test Approach and Test Results

The interoperability compliance testing evaluated the ability of synTelate to carry out call handling functions in a variety of scenarios through its TSAPI and Agent API interface with AE Services and Proactive Contact, respectively. The feature test cases were performed both automatically and manually. Outbound calls were automatically placed and delivered to synTelate Agent by Proactive Contact, and inbound calls were manually placed and delivered to synTelate Agent by Communication Manager. 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 Proactive Contact Agent API and from Application Enablement Services TSAPI. The Proactive Contact Editor was used to start/stop jobs. 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.

DevConnect Compliance Testing is conducted jointly by Avaya and DevConnect members. The jointly-defined test plan focuses on exercising APIs and/or standards-based interfaces pertinent to the interoperability of the tested products and their functionalities. DevConnect Compliance Testing is not intended to substitute full product performance or feature testing performed by DevConnect members, nor is it to be construed as an endorsement by Avaya of the suitability or completeness of a DevConnect member's solution.

## **2.1. Interoperability Compliance 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 managed jobs
- Proactive Agent Blending
- Log in, join job, go on/off break, leave job, and logoff
- Hold, retrieve, call transfer, conference, place manual call, agent drop, customer drop, release line/hang-up, and finish work.
- Set callback and update customer fields

## **2.2. Test Results**

All test cases passed successfully.

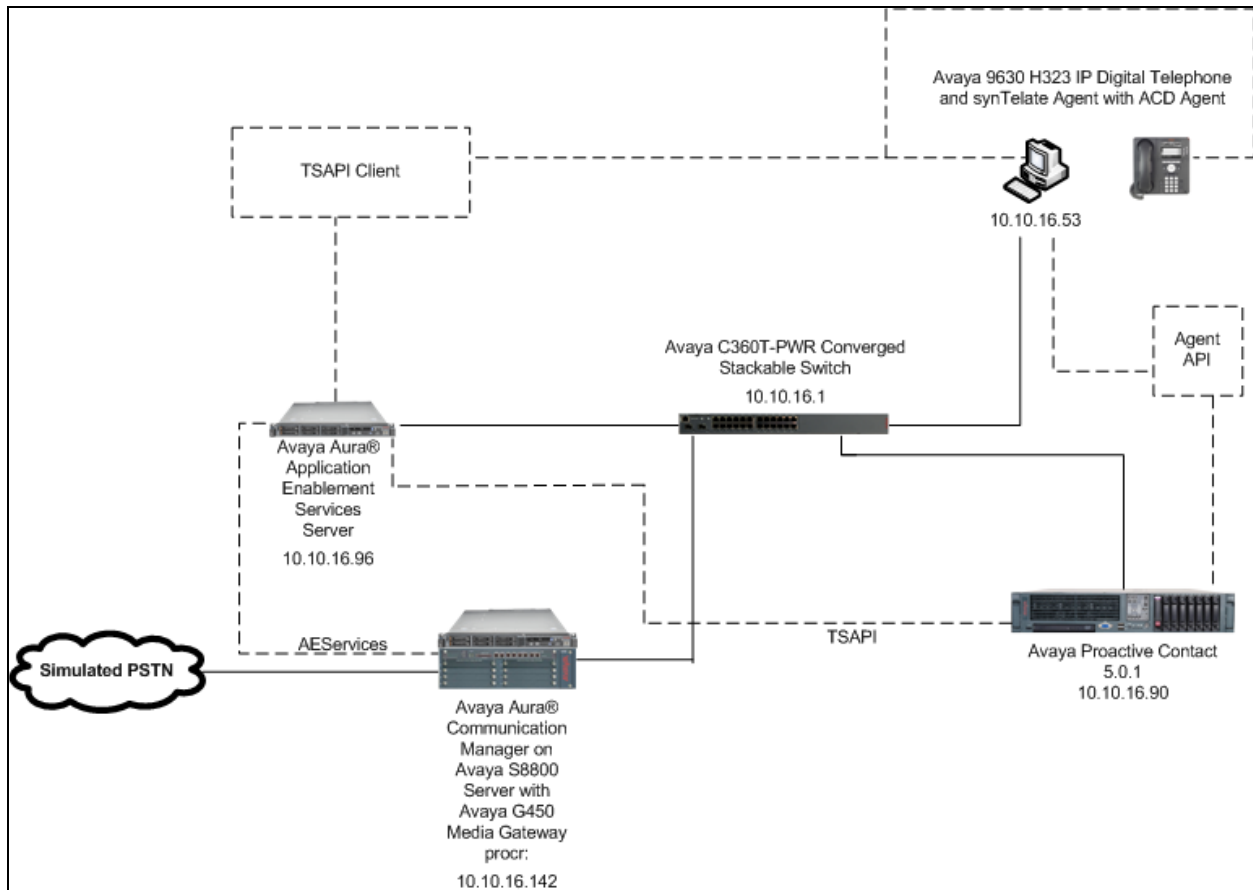
## **2.3. Support**

Technical support on synTelate can be obtained through the following:

- Phone: +44 (0) 141-552-8800
- Email: support@inisoft.co.uk

### 3. 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 calls for the agents, and used TSAPI to monitor and control the inbound calls for the agents.



**Figure 1: Inisoft synTelate with Avaya Proactive Contact using CTI and Proactive Agent Blending**

## 4. Equipment and Software Validated

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

Equipment/Software	Release/Version
Avaya Aura® Communication Manager running on Avaya S8800 Server	R6.2 SP3 R016x.02.0.823.0-20001
G450 Media Gateway MM710AP Media Module	31.22.0 HW5 FW022
Avaya Proactive Contact running on Avaya S8730 Server	R5.0.1 with patch 301, 302, 307, 309, 323, 328
Avaya Aura® Application Enablement Services running on Avaya S8800 Server	R6.2
Avaya 9630 H323 IP Telephone	R3.104S
Inisoft synTelate Enterprise Agent <ul style="list-style-type: none"><li>• MosaixTelephonySvr.dll</li><li>• TSAPITelephonySvr.dll</li></ul>	4.3.0 4.3.0 4.3.0

## 5. Configure Avaya Aura® Communication Manager

This section provides the procedures for configuring Communication Manager to support the CTI integration. The procedures include the following areas.

- Configure AEServices
- Configure Avaya Proactive Contact Adjunct Route
- Configure Inbound ACD
- Configure Avaya Proactive Contact Acquire feature
- Configure ACD agent for Proactive Agent Blend
- Configure feature access codes for Call Centre features
- Configure Phantom Extensions
- Configure and record Announcements

## 5.1. Configure AEServices

Enter the node **Name** and **IP Address** for AE Services. Take a note of the **procr** node **Name** and **IP Address**.

change node-names ip		Page 1 of 2
		IP NODE NAMES
Name	IP Address	
<b>procr</b>	<b>10.10.16.142</b>	
CM521	10.10.16.23	
Gateway	10.10.16.1	
IPbuffer	10.10.16.184	
Intuition	10.10.16.51	
MedPro	10.10.16.32	
Presence	10.10.16.83	
RDTT	10.10.16.185	
SESMNGR	10.10.16.44	
SM1	10.10.16.43	
SM61	10.10.16.201	
default	0.0.0.0	
<b>aesserver62</b>	<b>10.10.16.96</b>	

In order for Communication Manager to establish a connection to AE Services, administer the CTI Link as shown below. Specify an available **Extension** number, set the **Type** as **ADJ-IP**, which denotes that this is a link to an IP connected adjunct, and name the link for easy identification, in this instance, the node-name is used.

<b>add cti-link 1</b>		Page 1 of 3
CTI LINK		
CTI Link: 1		
Extension: <b>5899</b>		
Type: <b>ADJ-IP</b>		
Name: <b>aesserver62</b>		COR: 1

Using the command **change ip-services**, configure IP-Services for the AESVCS service. Using the **procr** node name as noted above as the **Local Node**

change ip-services					Page	1 of	4
IP SERVICES							
Service	Enabled	Local	Local	Remote	Remote		
Type		Node	Port	Node	Port		
AESVCS	y	procr	8765				

On **Page 4**, set the **AE Services Server** node-name and the **Password** that AE Services will use to authenticate with Communication Manager.

change ip-services				Page 4 of 4
AE Services Administration				
Server ID	AE Services Server	Password	Enabled	Status
1:	aesserver62	Avayapassword1	y	in use



## 5.2. Configure Avaya Proactive Contact Adjunct Route

The following is configured in order to route calls from Communication Manager to Proactive Contact Agents. This is the VDN which is referenced in the Proactive Contact Editor when the outbound job is administered. The adjunct route provides the means for AE Services to deliver a call from Communication Manager to an Agent on Proactive Contact. Enter an appropriate **Extension**, **Name** for the purposes of identification, and specify the **Vector Number** configured below.

<b>add vdn 5813</b>	Page 1 of 3
VECTOR DIRECTORY NUMBER	
<b>Extension:</b> 5813	
<b>Name*:</b> Adjunct Route	
Destination: <b>Vector Number</b> 3	
Attendant Vectoring? n	
Meet-me Conferencing? n	
Allow VDN Override? n	
COR: 1	
TN*: 1	
Measured: none	
VDN of Origin Annc. Extension*:	
1st Skill*:	
2nd Skill*:	
3rd Skill*:	

VDN 5813 has a destination of **Vector Number 3**. The **routing link** number is established by the administered position in the ip-services **Page 4**. The vector is configured accordingly, as shown below.

<b>change vector 3</b>	Page 1 of 6
CALL VECTOR	
<b>Number: 3</b> <b>Name: Adjunct Rt</b>	
Multimedia? n	Attendant Vectoring? n      Meet-me Conf? n      Lock? n
Basic? y	EAS? y    G3V4 Enhanced? y    ANI/II-Digits? y    ASAI Routing? y
Prompting? y	LAI? y    G3V4 Adv Route? y    CINFO? y    BSR? y    Holidays? y
Variables? y	3.0 Enhanced? y
01 <b>adjunct</b>	<b>routing link 1</b>
02 <b>wait-time</b>	<b>2    secs hearing silence</b>

### 5.3. Configure Inbound ACD

This VDN is used for delivering inbound calls to ACD agents independent of Proactive Contact.

<b>add vdn 5812</b>		Page	1 of	3
VECTOR DIRECTORY NUMBER				
Extension: 5812				
Name*: <b>Inbound</b>				
Destination: Vector Number			<b>2</b>	
Attendant Vectoring? n				
Meet-me Conferencing? n				
Allow VDN Override? n				
COR: 1				
TN*: 1				
Measured: none				
VDN of Origin Annc. Extension*:				
1st Skill*:				
2nd Skill*:				
3rd Skill*:				

VDN 5812 has a destination of Vector Number 2, which delivers calls to the agent skill.

<b>change vector 2</b>		Page 1 of 6
CALL VECTOR		
Number: 2	Name: <b>Inbound</b>	
Multimedia? n	Attendant Vectoring? n	Meet-me Conf? n Lock? n
Basic? y	EAS? y G3V4 Enhanced? y	ANI/II-Digits? y ASAI Routing? y
Prompting? y	LAI? y G3V4 Adv Route? y	CINFO? y BSR? y Holidays? y
Variables? y	3.0 Enhanced? y	
01 <b>queue-to</b>	<b>skill 2</b>	<b>pri h</b>
02 <b>wait-time</b>	<b>60 secs</b>	<b>hearing ringback</b>

Calls routed to VDN 5812 will route to skill 2, this is administered as a hunt group

<b>add hunt-group 2</b>		Page 1 of 4
HUNT GROUP		
Group Number: 2	ACD? y	
Group Name: Inbound	Queue? y	
Group Extension: 3092	Vector? y	
Group Type: ucd-mia		
TN: 1		
COR: 1	MM Early Answer? n	
Security Code:	Local Agent Preference? n	
ISDN/SIP Caller Display:		
Queue Limit: unlimited		
Calls Warning Threshold:	Port:	
Time Warning Threshold:	Port:	

<b>add hunt-group 2</b>		Page 2 of 4
HUNT GROUP		
Skill? <b>y</b>	Expected Call Handling Time (sec): 180	
AAS? n		
Measured: none		
Supervisor Extension:		
Controlling Adjunct: none		
Timed ACW Interval (sec):		
Multiple Call Handling: none		

## 5.4. Configure Avaya Proactive Contact Acquire feature

In order for Proactive Agent Blend to function, Communication Manager must be configured with a VDN monitored by Proactive Contact. When the agents who belong to the skill which the Acquire VDN monitors are not taking any inbound ACD calls, they are automatically acquired by Proactive Contact to service calls delivered by the outbound job administered in Proactive Contact Editor.

<b>add vdn 5811</b>	Page 1 of 3
VECTOR DIRECTORY NUMBER	
Extension: 5811	
Name*: <b>Dialer Acquire-Out</b>	
Destination: Vector Number <b>1</b>	
Attendant Vectoring? n	
Meet-me Conferencing? n	
Allow VDN Override? n	
COR: 1	
TN*: 1	
Measured: none	
VDN of Origin Annc. Extension*:	
1st Skill*:	
2nd Skill*:	
3rd Skill*:	

VDN 5811 has a destination of Vector Number 1, which monitors the Acquire skill.

<b>change vector 1</b>	Page 1 of 6		
CALL VECTOR			
Number: 1 Name: <b>DialerAcquireOu</b>			
Multimedia? n	Attendant Vectoring? n	Meet-me Conf? n	Lock? n
Basic? y	EAS? y G3V4 Enhanced? y	ANI/II-Digits? y	ASAI Routing? y
Prompting? y	LAI? y G3V4 Adv Route? y	CINFO? y	BSR? y Holidays? y
Variables? y	3.0 Enhanced? y		
01 <b>queue-to</b>	<b>skill 1</b>	<b>pri m</b>	
02 wait-time	60 secs	hearing ringback	

As shown in vector 1, skill 1 will be the skill in which the agents required for Proactive Agent Blending will reside. Skill 1 is administered as a hunt group

<b>add hunt-group 1</b>	Page 1 of 4
HUNT GROUP	
Group Number: 1	ACD? <b>y</b>
Group Name: <b>Dialer Acquire-Out</b>	Queue? <b>y</b>
Group Extension: <b>3091</b>	Vector? <b>y</b>
Group Type: ucd-mia	
TN: 1	
COR: 1	MM Early Answer? n
Security Code:	Local Agent Preference? n
ISDN/SIP Caller Display:	
Queue Limit: unlimited	
Calls Warning Threshold:	Port:
Time Warning Threshold:	Port:

<b>add hunt-group 1</b>	Page 2 of 4
HUNT GROUP	
Skill? <b>y</b>	Expected Call Handling Time (sec): 180
AAS? n	
Measured: none	
Supervisor Extension:	
Controlling Adjunct: none	
Timed ACW Interval (sec):	
Multiple Call Handling: none	

## 5.5. Configure ACD Agent for Proactive Agent Blend

In order for the ACD agent to be acquired by Proactive Contact once it has completed taking inbound calls using the Proactive Agent Blend feature, it must be in both the inbound skill (2) and the Acquire skill (1).

add agent-loginID 5621		Page 1 of 3
AGENT LOGINID		
Login ID: 5621	AAS? n	
Name: <b>Agent1</b>	AUDIX? n	
TN: 1	LWC Reception: spe	
COR: 1	LWC Log External Calls? n	
Coverage Path:	AUDIX Name for Messaging:	
Security Code:	LoginID for ISDN/SIP Display? n	
	Password:	
	Password (enter again):	
	Auto Answer: station	
	MIA Across Skills: system	
	ACW Agent Considered Idle: system	
	Aux Work Reason Code Type: system	
	Logout Reason Code Type: system	
	Maximum time agent in ACW before logout (sec): system	
	Forced Agent Logout Time: :	
WARNING: Agent must log in again before changes take effect		

add agent-loginID 5621		Page 2 of 3
AGENT LOGINID		
Direct Agent Skill:	Service Objective? n	
Call Handling Preference: skill-level	Local Call Preference? n	
SN RL SL	SN RL SL	SN RL SL
1: 1 2	16:	31: 46:
2: 2 2	17:	32: 47:

## 5.6. Configure feature access codes for Call Centre features

These feature access codes will be referenced later in the Proactive Contact Configuration and used to change the state of the agent

<b>change feature-access-codes</b>		Page	5 of
10	FEATURE ACCESS CODE (FAC)		
	Call Center Features		
AGENT WORK MODES			
	After Call Work Access Code: *36		
	Assist Access Code: *37		
	Auto-In Access Code: <b>*38</b>		
	Aux Work Access Code: *39		
	<b>Login Access Code: *40</b>		
	<b>Logout Access Code: *41</b>		
	Manual-in Access Code: *42		

## 5.7. Configure Phantom Extensions

Phantom numbers are used during Agent Blending to pick an agent for outbound calling by dialing the acquire VDN. Once the agent is picked, the CTI dialer puts the agent in AUX work mode. In this example, extension 5800 – 5804 are configured as Phantom numbers. The configuration of Phantom number 5800 is displayed below.

add station 5800		Page	1 of	5
STATION				
Extension: 5800	Lock Messages? n	BCC:	0	
Type: CTI	Security Code:	TN:	1	
Port: X	Coverage Path 1:	COR:	1	
Name: Acquire 1	Coverage Path 2:	COS:	1	
	Hunt-to Station:			
STATION OPTIONS				
	Time of Day Lock Table:			
Loss Group: 1	Personalized Ringing Pattern: 1			
Data Module? n	Message Lamp Ext: 5800			
Display Module? n				
Display Language: english				
Survivable COR: internal	Media Complex Ext:			
Survivable Trunk Dest? y				

## 5.8. Configure and Record Announcements

It is assumed that Communication Manager has been administered as required and announcements have been recorded for use by Proactive Contact, enter the command **list integrated-annc-boards** to display the administered announcements.

list integrated-annc-boards					
INTEGRATED ANNOUNCEMENTS					
Board Location: 001V9			Time Remaining at 64Kbps: 2839		
Internal Group	Announcement			Length	Size
Number	Number Extension	Name		(Sec)	(Kb)
NA	5631	welcometopc5		3	24
NA	5632	youarenowininboundmod		2	16
NA	5633	youarenowinoutboundmode		2	16
NA	5634	yourenotloggedin		1	11



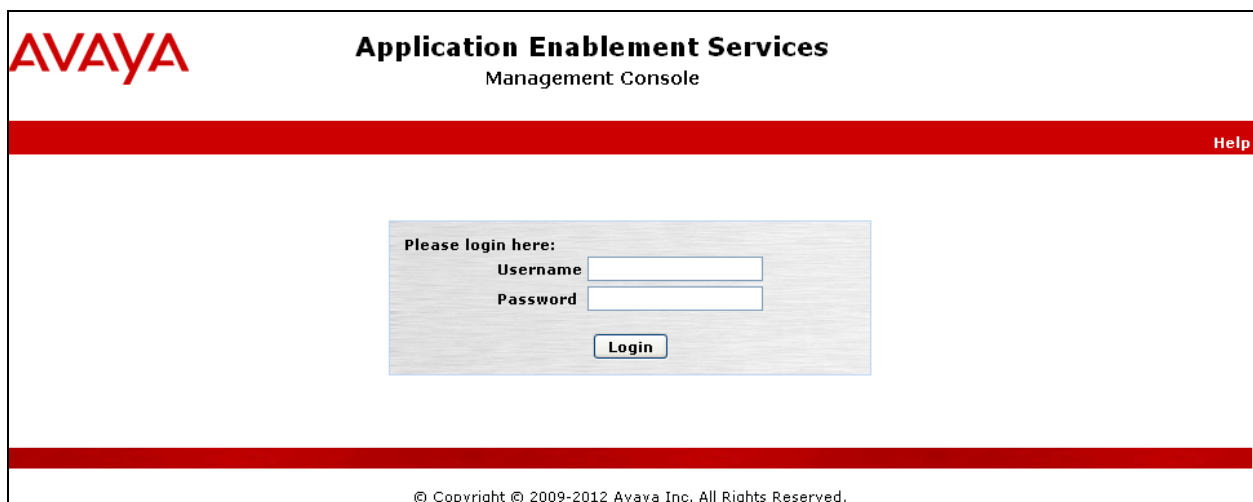
## 6. Configure Avaya Aura® Application Enablement Services Server

This section provides the procedures for configuring Application Enablement Services. The procedures include the following areas:

- Launch OAM interface
- Administer the Switch Connection
- Administer TSAPI Link
- Restart TSAPI Service
- Obtain Tlink name
- Administer Avaya Proactive Contact and synTelate user


### 6.1. Launch OAM Interface

Access the OAM web-based interface of AE Services, in this instance using the URL <https://10.10.16.96>. The Management console is displayed. Login using the appropriate credentials.



The screenshot shows the Avaya Application Enablement Services Management Console login page. At the top left is the Avaya logo. To its right, the text "Application Enablement Services" is displayed in bold, with "Management Console" underneath it. A red horizontal bar spans the width of the page, with the word "Help" in white text on the right side. In the center of the page is a login box with a light gray background. Inside the box, the text "Please login here:" is followed by "Username" and "Password" labels, each with a corresponding text input field. Below these fields is a "Login" button. At the bottom of the page, a red horizontal bar is present, and below it, the copyright notice "© Copyright © 2009-2012 Avaya Inc. All Rights Reserved." is displayed.

The **Welcome to OAM** screen is displayed next.



**Application Enablement Services**  
Management Console

Welcome: User craft  
Last login: Tue Oct 2 15:09:34 2012 from 10.10.16.62  
Number of prior failed login attempts: 0  
HostName/IP: aesserver62/10.10.16.96  
Server Offer Type: TURNKEY  
SW Version: r6-2-0-18-0  
Server Date and Time: Fri Oct 5 15:17:18 BST 2012

Home

Home | Help | Logout

▶ AE Services

▶ Communication Manager Interface

▶ Licensing

▶ Maintenance

▶ Networking

▶ Security

▶ Status

▶ User Management

▶ Utilities

▶ Help

**Welcome to OAM**

The AE Services Operations, Administration, and Management (OAM) Web provides you with tools for managing the AE Server. OAM spans the following administrative domains:

- AE Services - Use AE Services to manage all AE Services that you are licensed to use on the AE Server.
- Communication Manager Interface - Use Communication Manager Interface to manage switch connection and dialplan.
- Licensing - Use Licensing to manage the license server.
- Maintenance - Use Maintenance to manage the routine maintenance tasks.
- Networking - Use Networking to manage the network interfaces and ports.
- Security - Use Security to manage Linux user accounts, certificate, host authentication and authorization, configure Linux-PAM (Pluggable Authentication Modules for Linux) and so on.
- Status - Use Status to obtain server status infomations.
- User Management - Use User Management to manage AE Services users and AE Services user-related resources.
- Utilities - Use Utilities to carry out basic connectivity tests.
- Help - Use Help to obtain a few tips for using the OAM Help system

Depending on your business requirements, these administrative domains can be served by one administrator for all domains, or a separate administrator for each domain.

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## 6.2. Administer the Switch Connection

To establish the connection between Communication Manager and AE Services, click **Communication Manager Interface** → **Switch Connections**. In the field next to Add Connection enter **CM62** and click on **Add Connection**.

Communication Manager Interface | Switch Connections Home | Help | Logout

AE Services  
Communication Manager Interface  
Switch Connections  
Dial Plan  
Licensing  
Maintenance

Switch Connections

CM62 Add Connection

Connection Name	Processor Ethernet	Msg Period	Number of Active Connections
-----------------	--------------------	------------	------------------------------

Edit Connection Edit PE/CLAN IPs Edit H.323 Gatekeeper Delete Connection Survivability Hierarchy

The following screen is displayed. Complete the configuration as shown and enter the password specified in **Section 5.1** when configuring AESVCS in ip-services. Click on **Apply** when done.

Communication Manager Interface | Switch Connections Home | Help | Logout

AE Services  
Communication Manager Interface  
Switch Connections  
Dial Plan  
Licensing  
Maintenance  
Networking  
Security  
Status  
User Management  
Utilities  
Help

Connection Details - CM62

Switch Password \*\*\*\*\*  
Confirm Switch Password \*\*\*\*\*

Msg Period 30 Minutes (1 - 72)  
SSL ☒  
Processor Ethernet ☒

Apply Cancel

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The following screen will be shown displaying the newly added switch connection, click **Edit PE/CLAN IPs**.

Communication Manager Interface | Switch Connections Home | Help | Logout

AE Services  
Communication Manager Interface  
Switch Connections  
Dial Plan  
Licensing  
Maintenance  
Networking  
Security  
Status  
User Management  
Utilities  
Help

Switch Connections

CM62 Add Connection

Connection Name	Processor Ethernet	Msg Period	Number of Active Connections
CM62	Yes	30	0

Edit Connection Edit PE/CLAN IPs Edit H.323 Gatekeeper Delete Connection Survivability Hierarchy

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Click on **Edit PE/CLAN IPs** in order to specify the IP address of the procr, as noted in **Section 5.1**. Next to **Add name or IP**, enter the IP address of the procr as shown below.



Communication Manager Interface | Switch Connections Home | Help | Logout

AE Services  
Communication Manager Interface  
Switch Connections  
Dial Plan  
Licensing  
Maintenance  
Networking  
Security  
Status  
User Management  
Utilities  
Help

Edit Processor Ethernet IP - CM62

10.10.16.142 Add/Edit Name or IP

Name or IP Address	Status
10.10.16.142	Idle

Back

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The following screen will now appear displaying the newly added IP address.



Communication Manager Interface | Switch Connections Home | Help | Logout

AE Services  
Communication Manager Interface  
Switch Connections  
Dial Plan  
Licensing  
Maintenance  
Networking  
Security  
Status  
User Management  
Utilities  
Help

Edit Processor Ethernet IP - CM62

10.10.16.142 Add/Edit Name or IP

Name or IP Address	Status
10.10.16.142	Idle

Back

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### 6.3. Administer TSAPI Link

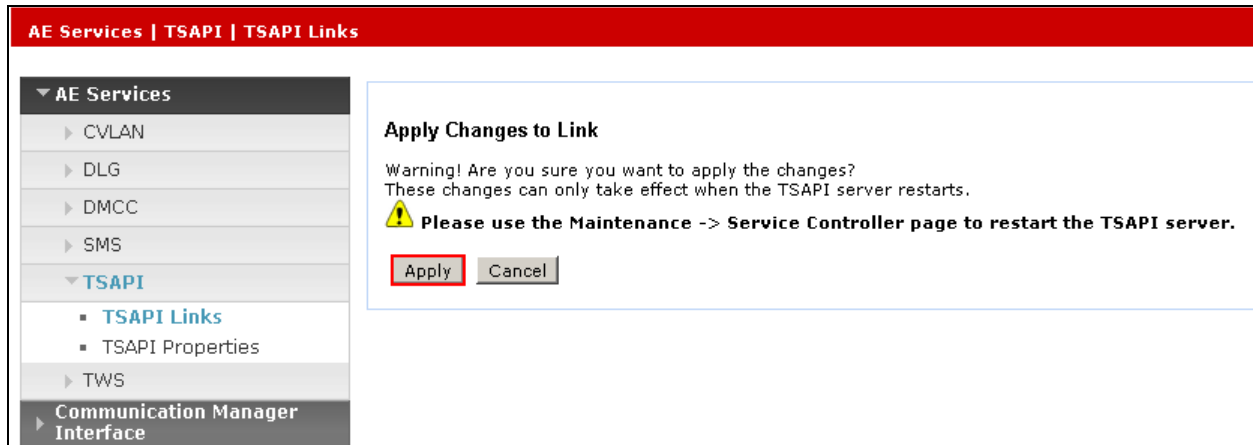
Select **AE Services** → **TSAPI** → **TSAPI Links** from the left pane. The **TSAPI Links** screen is displayed, click **Add Link**.

The screenshot shows the 'AE Services | TSAPI | TSAPI Links' interface. On the left, a navigation pane lists 'AE Services' with sub-items: CVLAN, DLG, DMCC, SMS, TSAPI (expanded), TSAPI Links (selected), TSAPI Properties, TWS, and Communication Manager Interface. The main area is titled 'TSAPI Links' and contains a table with two columns: 'Link' and 'Switch Connection'. Below the table are three buttons: 'Add Link' (highlighted with a red box), 'Edit Link', and 'Delete Link'.

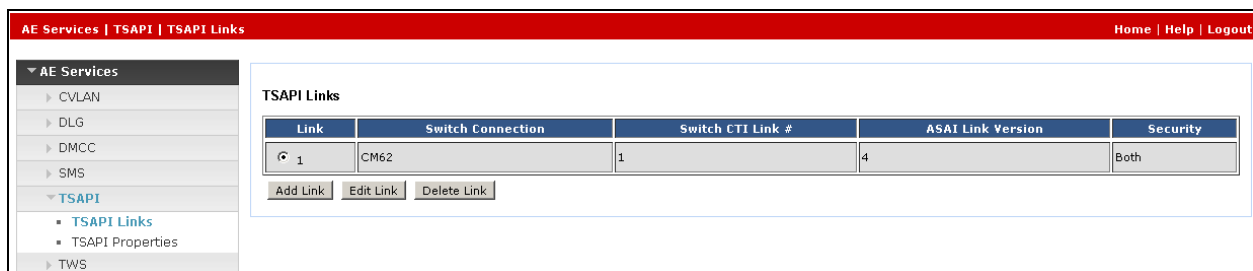
Configure the TSAPI Link using the newly configured **Switch Connection** and choose the **Switch CTI Link Number** configured in **Section 5.1**, set the **Security** to **Both** to enable both Encrypted and Unencrypted TSAPI connections and click **Apply Changes**.

The screenshot shows the 'Add TSAPI Links' configuration screen. The left navigation pane is the same as in the previous screenshot. The main area is titled 'Add TSAPI Links' and contains the following fields: 'Link' (dropdown menu with '1' selected), 'Switch Connection' (dropdown menu with 'CM62' selected, highlighted with a red box), 'Switch CTI Link Number' (dropdown menu with '1' selected, highlighted with a red box), 'ASAI Link Version' (dropdown menu with '4' selected), and 'Security' (dropdown menu with 'Both' selected, highlighted with a red box). At the bottom are two buttons: 'Apply Changes' (highlighted with a red box) and 'Cancel Changes'.

The screen below will be displayed with instructions to restart the TSAPI Server. Click **Apply** taking note of the instructions given.



The following screen shows the TSAPI Link used during the compliance test.



## 6.4. Restart TSAPI Service

Select **Maintenance** → **Service Controller** from the left pane, to display the **Service Controller** screen in the right pane. Check the **TSAPI Service**, and click **Restart Service**.

The screenshot shows a web interface for the Service Controller. On the left is a navigation pane with a tree structure. The 'Maintenance' section is expanded, and 'Service Controller' is selected. The main area on the right is titled 'Service Controller' and contains a table of services. The 'TSAPI Service' is checked, and the 'Restart Service' button is highlighted with a red box. Below the table, there is a link to 'Status and Control' and a row of buttons: Start, Stop, Restart Service, Restart AE Server, Restart Linux, and Restart Web Server.

**Maintenance | Service Controller**

▶ AE Services  
▶ Communication Manager Interface  
▶ Licensing  
▼ Maintenance  
    Date Time/NTP Server  
    ▶ Security Database  
    **Service Controller**  
    ▶ Server Data  
▶ Networking  
▶ Security  
▶ Status  
▶ User Management

**Service Controller**

Service	Controller Status
<input type="checkbox"/> ASAI Link Manager	Running
<input type="checkbox"/> DMCC Service	Running
<input type="checkbox"/> CVLAN Service	Running
<input type="checkbox"/> DLG Service	Running
<input type="checkbox"/> Transport Layer Service	Running
<input checked="" type="checkbox"/> TSAPI Service	Running

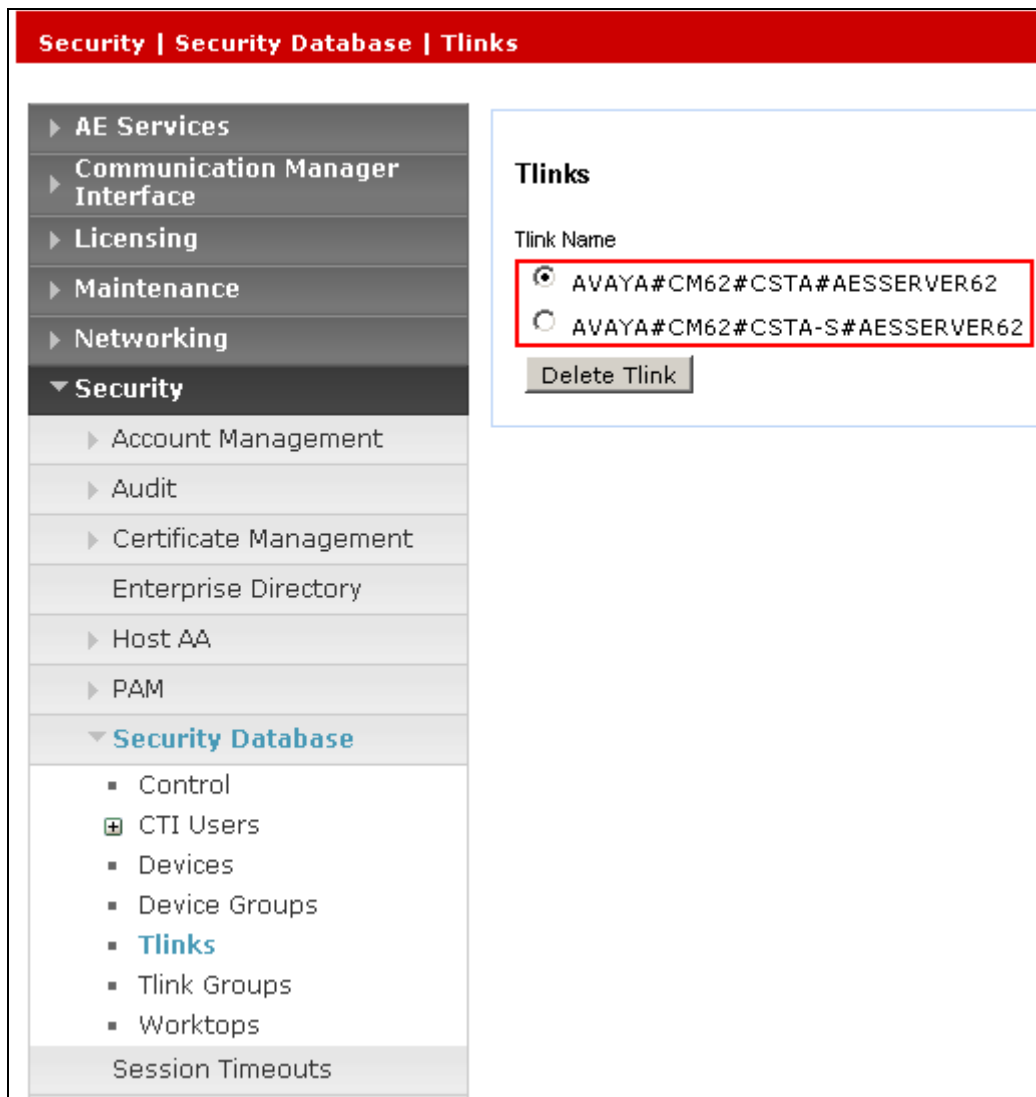
For status on actual services, please use [Status and Control](#)

Start Stop **Restart Service** Restart AE Server Restart Linux Restart Web Server

## 6.5. Obtain Tlink Name

Select **Security** → **Security Database** → **Tlinks** from the left pane. The **Tlinks** screen shows a listing of the Tlink names. Locate the Tlink name associated with the relevant switch connection, which would use the name of the switch connection as part of the Tlink name.

**Note:** The encrypted TSAPI link is used by Proactive Contact.





## 6.6. Administer Avaya Proactive Contact and synTelate User

In this section two users are configured, the first for use by Proactive Contact, and another for the synTelate Client to communicate with the AEServices. Select **User Management** → **User Admin** → **Add User** from the left pane to display the **Add User** screen in the right pane. Enter desired values for **User Id**, **Common Name**, **Surname**, **User Password** and **Confirm Password**. For **CT User**, select **Yes** from the drop-down list. Retain the default value in the remaining fields. Click **Apply** at the bottom of the screen (not shown below).

**User Management | User Admin | Add User**

▶ AE Services

▶ Communication Manager Interface

▶ Licensing

▶ Maintenance

▶ Networking

▶ Security

▶ Status

▼ User Management

▶ Service Admin

▼ User Admin

▪ Add User

▪ Change User Password

▪ List All Users

▪ Modify Default Users

▪ Search Users

**Add User**

Fields marked with \* can not be empty.

\* User Id

pc501sd

\* Common Name

pc501sd

\* Surname

pc501sd

\* User Password

••••••••

\* Confirm Password

••••••••

Admin Note

Avaya Role

None

Business Category

Car License

CM Home

Css Home

CT User

Yes

Repeat the steps above to create the synTelate user. Enter desired values for **User Id**, **Common Name**, **Surname**, **User Password**, and **Confirm Password**. For **CT User**, select **Yes** from the drop-down list. Retain the default value in the remaining fields. Click **Apply** at the bottom of the screen (not shown below).

**User Management | User Admin | Add User**

▶ AE Services

▶ Communication Manager Interface

▶ Licensing

▶ Maintenance

▶ Networking

▶ Security

▶ Status

▼ User Management

▶ Service Admin

▼ User Admin

▪ Add User

▪ Change User Password

▪ List All Users

▪ Modify Default Users

▪ Search Users

**Add User**

Fields marked with \* can not be empty.

\* User Id

syntelate

\* Common Name

syntelate

\* Surname

syntelate

\* User Password

●●●●●●●●●●

\* Confirm Password

●●●●●●●●●●

Admin Note

Avaya Role

None

Business Category

Car License

CM Home

Css Home

CT User

Yes

In addition, the user which will be used by Proactive Contact and synTelate should be configured as an unrestricted user. Select **Security**→ **Security Database** → **CTI Users** → **List All Users** from the left pane, click on the radio button beside the user created above, in this case, **pc501sd** and click **Edit** (not shown). Check the box next to **Unrestricted Access**, as shown in the screen below. Click **Apply Changes** when done.

Security | Security Database | CTI Users | List All Users

▶ AE Services

▶ Communication Manager Interface

▶ Licensing

▶ Maintenance

▶ Networking

▼ Security

▶ Account Management

▶ Audit

▶ Certificate Management

Enterprise Directory

▶ Host AA

▶ PAM

▼ Security Database

▪ Control

CTI Users

▪ List All Users

▪ Search Users

Edit CTI User

User Profile:

User ID

Common Name

Worktop Name

Unrestricted Access

pc501sd

pc501sd

NONE

☒

Call and Device Control:

Call Origination/Termination and Device Status

None

Call and Device Monitoring:

Device Monitoring

Calls On A Device Monitoring

Call Monitoring

None

None

☐

Routing Control:

Allow Routing on Listed Devices

None

Apply Changes

Cancel Changes

## 7. Configure Avaya Proactive Contact

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

- Verify Avaya Proactive Contact Licensing
- Configure CTI Link
- Configure Avaya Proactive Contact with CTI for Agent Blending
- Configure master.cfg
- Configure number format
- Configure the calling list
- Configure Avaya Proactive Contact Editor

### 7.1. Verify Avaya Proactive Contact Licensing

Access the Web License Manager of Avaya Proactive Contact, in this instance using the URL <https://<ip-address>:52233/WebLM/> where ip-address is the IP address of the Proactive Contact Server. The Web License Manager Screen is displayed, login using the appropriate credentials.



The **Web License Manager** screen below is displayed. Select **Licensed products** → **Avaya\_Proactive\_Contact** in the left pane, to display the **Licensed Features** screen in the right pane. Verify that there are sufficient licenses for each of the fields displayed:

**AVAYA** Web License Manager (WebLM v4.7) [Logoff](#)

**Install License**  
**Licensed Products**  
    **Avaya\_Proactive\_Contact**  
        Configure Enterprise  
        Configure Local WebLMs  
            Add Local WebLM  
            Delete Local WebLM  
            Modify Local WebLM  
        Usages  
        Allocations  
        Periodic Status  
**Uninstall License**  
**Change Password**  
**Server Properties**  
**Manage Users**  
**Logout**

**Avaya\_Proactive\_Contact - Release: 5 - SID: 11618150 (Enterprise License File)**

You are here: Licensed Products > Avaya\_Proactive\_Contact > View by Feature

License installed on: 29-Apr-2011 10:12:36 o'clock GMT

[View by Local WebLM](#)

Feature (License Keyword)	License Capacity	Currently Available
Number of PBX Agents using Avaya CT with predictive (VALUE_APC_PREDICTIVECTIAGENTS)	100	100
Number of telephone lines (VALUE_APC_PHONELINES)	100	100
Number of Agents with Predictive Dialing (VALUE_APC_PREDICTIVE_AGENTS)	100	100
Number of PBX Agents using Avaya CT (VALUE_APC_TOTALCTIAGENTS)	100	100
Number of Supervisor Workstations (VALUE_APC_SUPERVISORS)	10	9
Number of Agents (VALUE_APC_TOTAL_AGENTS)	100	100

[View by Local WebLM](#)

## 7.2. Configure CTI Link

In order to establish the TSAPI link between Proactive Contact and AE Services, the relevant fields were edited. From the Proactive Contact Shell, create a `cti_passwd.cfg` file by performing the following:

- type **cti\_passwd -s** (s denotes the CTI Option).

When prompted for the password enter the password assigned to the CTI user configured earlier on the Application Enablement Services Server, and hit return, re-enter as requested. Navigate to the `/opt/avaya/pds/config/swif_ct.cfg` file and change the parameters as follows:

- **SERVER** – enter the Secure TSAPI Link obtained in **Section 6.5**
- **LOGIN** – enter the CTI user created for Proactive Contact in **Section 6.6**
- **REASONCODE** – enter **0** in order for Agent Blending to operate.
- **PHANTOMNUMBERS** – enter the phantom extensions configured in **Section 5.7**
- **WORKMODE** – set to **AUTO\_IN**

```
SERVER: AVAYA#CM62#CSTA-S#AESSEVER62
LOGIN: pc501
REASONCODE: 0
PHANTOMNUMBERS: 5800-5804
WORKMODE: AUTO_IN
AGENTANSWER: NO
PRIORITYCALL: NO
```

**Note:** The Tlink, the Proactive Contact CTI username, and the phantom numbers assigned, as configured earlier. The **REASONCODE** *must* be **0**.

Navigate to the `/opt/avaya/pds/config/` directory. Copy and rename the `tslibrc` file, by typing **cp tslibrc .tslibrc** and press Enter. Edit `.tslibrc` with the IP Address of AE Services, as shown.

```
[Telephony Servers]
; This is a list of the servers offering Telephony Services via TCP/IP.
; Either domain name or IP address may be used; default port number is 450
; The form is: host name=port number   For example:
;
; tserver.mydomain.com=450
10.10.16.96
;

; This file should be copied to CONFIG directory as .tslibrc.
; See master.cfg for the directory name.

; This entry overrides the [Telephony Servers] section, if any.
```

For the purposes of Agent Blending, copy the .tslibrc file to the /opt/avaya/pab/config/ directory by entering the command **cp /opt/avaya/pds/config/.tslibrc /opt/avaya/pab/config/.tslibrc**. Navigate to **/opt/avaya/pds/config** – edit **opmon.cfg** as shown below:

```
CFGTIME:15
#DIALBACK:1-15:15:1::
#DIALBACKNUM:ALL
SOFTDIAL:1-15
```

Edit **dgswitch.cfg** as shown below. Enter the same number of Headset Ports as the number of outbound agents and the same number of Trunks as configured in the PORTS and the LINEASSIGN rows of master.cfg

```
# Headset Ports
H:1:96:0::#1-1-4-1
H:2:97:0::#1-1-4-2
H:3:98:0::#1-1-4-3
H:4:99:0::#1-1-4-4
H:5:100:0::#1-1-4-5
H:6:101:0::#1-1-4-6
H:7:102:0::#1-1-4-7
H:8:103:0::#1-1-4-8
H:9:104:0::#1-1-4-9
H:10:105:0::#1-1-4-10
H:11:106:0::#1-1-4-11
H:12:107:0::#1-1-4-12
H:13:108:0::#1-1-4-13
H:14:109:0::#1-1-4-14
H:15:110:0::#1-1-4-15

# Normal Inbound/Outbound Trunks
N:1:168:0::#1-1-11-1
N:2:169:0::#1-1-11-2
N:3:170:0::#1-1-11-3
N:4:171:0::#1-1-11-4
N:5:172:0::#1-1-11-5
N:6:200:0::#1-1-11-6
N:7:201:0::#1-1-11-7
N:8:202:0::#1-1-11-8
N:9:203:0::#1-1-11-9
N:10:204:0::#1-1-11-10
N:11:205:0::#1-1-11-11
N:12:206:0::#1-1-11-12
N:13:207:0::#1-1-11-13
N:14:208:0::#1-1-11-14
N:15:209:0::#1-1-11-15
N:16:210:0::#1-1-11-16
N:17:211:0::#1-1-11-17
N:18:212:0::#1-1-11-18
N:19:213:0::#1-1-11-19
N:20:214:0::#1-1-11-20

# Transfer-thru Trunks
T:1:300:0::#1-1-18-1
```

Edit only the last 4 lines of **voicemsg.cfg**. This file refers to the announcements recorded earlier on Communication Manager in **Section 5.8**.

```
250:greeting:5631:Female:Folder4:Voice:Message27
251:inbound:5632:Female:Folder4:Voice:Message28
252:outbound:5633:Female:Folder4:Voice:Message29
253:notLoggedIn:5634:Female:Folder4:Voice:Message30
```



Navigate to the **/opt/avaya/pds/scripts** directory and copy the telephny\_sp.spt file to the telephny.spt file using the following command **cp telephny\_sp.spt telephny.spt**. This file defines Softdialer specific parameters.

### 7.3. Configure Avaya Proactive Contact with CTI for Agent Blending

From the Proactive Contact Shell, create a **cti\_passwd.cfg** file by entering the following:  
Type **cti\_passwd -b** (b denotes the blend). When prompted for the password enter the password assigned to the CTI user configured earlier on the Application Enablement Services Server, and hit return, re-enter as requested. Navigate to the **/opt/avaya/pab/config/** directory. Copy and rename the **ctirc.cvct** file, by typing **cp ctirc.cvct ctirc1**. Edit **ctirc1** as shown below:

```
#####  
# LAST REVISION $Date: 2002/02/20 16:24:55 $  
#####  
# The only configurable line is the 14th line after the comments (third from  
# the bottom). There are five fields in this line:  
# Field 1: TLINK  
# Field 2: Login name for CVCT (run "cti_passwd -b" to setup the encrypted  
password)  
# Field 3: Application Name (PDS)  
# Field 4: TS2 - This is the library version that we used. Do no change.  
0 # CVCT CEP (switch type)  
0x11 # CEP CHGSVR  
0x2015A # Supported Events  
0 # Stats and Counts (No MIS for Aspect)  
0 # Appear and Vanish (No LM for Aspect)  
0 # Agent Available, Login, Logout  
0 # per-outstanding-move (N/A for Aspect)  
0 # seconds added to LM (N/A for Aspect)  
0 # seconds added to LC (N/A for Aspect)  
Port SupId SupPass  
NotUsed  
AVAYA#CM62#CSTA-S#AESSERVER62:pc501:PDS:TS2  
chgsvr  
cep_pway
```

Copy and rename the CBA\_procs.example file, type **cp CBA\_procs.example CBA\_procs** and press Enter. Edit **CBA\_procs** to include the Proactive Contact hostname as shown below:

```
#####
#                                     |Max Wait|Max Wait|Max Wait|Max Wait|Kill
#                                     | Before | Before | Before | Before |Cfg-
# Process|Startup|Shutdown|Shutdown|  Abort  | SIGTERM| SIGKILL|Only
#   Type | Order | Order  | Message| Message| Signal | Signal |Mode
#-----
# NOTE - Startup Order and Shutdown Order MUST start at the value one(1) and
#       increment WITHOUT any sequence gaps
PROCESS_CONTROL
SOE| 1 | 5 | -1 | -1 | -1 | 25 | 0
USR| 2 | 4 | -1 | -1 | 21 | 24 | 0
CTI| 3 | 3 | 11 | 15 | 24 | 35 | 1
ACD| 4 | 2 | 0  | 5  | 10 | 11 | 1
MSC| 5 | 1 | -1 | -1 | -1 | 25 | 0

#####
# Process | Host | Path | Binary | Parameters
#   Type  | Name |      | Name   |
#-----
PROCESS_INSTANCE
USR|devconsd|/opt/avaya/pab/bin/|cbauser|1
CTI|devconsd|/opt/avaya/pab/bin/|cti|1
ACD|devconsd|/opt/avaya/pab/bin/|acdmon|1 nocancel min_asa 2sec gen_rel
MSC|devconsd|/opt/avaya/pab/scripts/|acdsnap_mon|
```

Copy and rename the CBA\_cfg.example file, type **cp CBA\_cfg.example CBA\_cfg** and press Enter. This establishes the Application, PBX and Gateway IDs used by Agent Blending.

Proactive Contact needs to be configured with the inbound VDN to be monitored and the acquire VDN for acquiring agents in order to handle calls from the outbound job. The Proactive Contact name for a VDN is Domain. Configured in **/opt/avaya/pab/config/dom\_group.data** – this defines an outbound only Domain Group called SOUTH\_USA, an IB (inbound) Domain called 5812, with specific reference to VDN 5812, and a TEAM (acquire) Domain called 5811 with specific reference to VDN 5811. Both of these Domains have a Domain Group ID of SOUTH\_USA.

```
*VERSION | 1
##### Defined Domains Groups #####
# Domain Group Record Layout - To Create a new domain group copy the template
#   below and replace all field holders with appropriate values.
#   NOTE - All fields that retain their place holder values (TR, TT, etc)
#           will be assumed to be empty.
#   NOTE - Line breaks may happen between any fields but not within a field
#   NOTE - Do not change lower case field holders
#
#   WARNING - Remove the "#" comment field indicator to activate the template
#
# TEMPLATE
# -----
--
# *DG | DG_NM | dg_id | RTI | CM | MAAS | SC | DSL | MSL |
#   AUT | MAO | TR | TT | ACWT | MQR | afi | rti |
# -----
--
#
# Description of fields within a Domain Group
# -----
# *      - Start Of New Record { MUST be in first column of record}
# DG      - Domain Group Record Key   { Always DG}
# DG_NM   - Domain Group Name {Descriptive name use by UI to specify a domain}
# dg_id   - Domain Group ID { FILLED IN BY SYSTEM}
# RTI     - Time Interval (hours)
# CM      - Control Method {ASA-Avg.Spd Answered,SL-Sevice Lvl,OB_ONLY-
Outbound}
# MAAS    - [Target] Average Speed to Answer (seconds)
# SC      - Service Criterion (seconds)
# DSL     - Desired Service Level (%)
# MSL     - Abatement Service Level (%)
# AUT     - Traffic Intensity Threshold (%)
# MAO     - Minimum # of Agents on Outbound (# agents)
# TR      - Initial Traffic Rate (calls/second)
# TT      - Minimum Talk Time (seconds)
# ACWT    - Minimum After Call Work Time (seconds)
# MQR     - Minimum Queued for Release (OB_ONLY groups)
# afi     - Acquisitions From Inbound { FILLED IN BY SYSTEM }
# rti     - Releases To Inbound          { FILLED IN BY SYSTEM }
#
#
# *DG | SOUTH_USA | 1 | RTI | OB_ONLY | MAAS | SC |
#     DSL | MSL | AUT | MAO | TR | TT |
#     ACWT | 0 | afi | rti |
```

```

##### Defined Domains #####
# Domain Record Layout - To Create a new domain copy the template below
#   and replace all field holders with appropriate values.
#   NOTE - All notes/warnings from domain group field still apply.
#
# TEMPLATE
# -----
# *DM | DM_ADRS | DM_EXT | DG_NM | dg_id | AP_ID | PBX_ID | GW_ID | DM_TYP |
# -----
#
# Description of fields within a Domain
# -----
# *          - Start Of New Record {MUST be in first column of record}
# DM         - Domain Record Keyword    {Always DM}
#
# DM_ADRS- Domain Address
# DM_EXT - Domain Phone Number
# DG_NM  - Domain Group Name {Descriptive name use by UI to specify a D.G.}
#                Use TRANS if defining a floating transient domain.
# dg_id  - Domain Group ID {FILLED IN BY SYSTEM}
# AP_ID  - PDS ID
# PBX_ID - PBX ID
# GW_ID  - Gateway ID
# DM_TYP - Domain Type -- one of:
#                IB          - Inbound,
#                TRANS       - Transient Acquire,
#                TEAM        - Team Acquire,
#                OV_FLOW     - Overflow
#
#
# *DM | 5811 | 5811 | SOUTH_USA | 1 | 1 | 1 |
#      1 | TEAM |
#
# *DM | 5812 | 5812 | SOUTH_USA | 1 | 1 | 1 |
#      1 | IB |

```

Edit **ACD.cfg** – this contains the Communication Manager feature access codes for ACD login and logout as noted previously, and also specifies the TESTMODE, configured as shown below:

```
TESTMODE:OFF  
DELAYTIME:5  
LOGIN:*40  
LOGOUT:*41
```

Edit **acd\_ext.cfg** – this contains the Communication Manager extension number into which Proactive Contact Agents and ACD Agents will be logging in, as show below, extension **6000** is the extension onto which agents are logged into in this case:

```
1:6000  
1:1603  
1:1650  
1:1608
```

Agent Blending is a feature add-on for Proactive Contact. Ensure that PDS is stopped, as root, enter the command **menu install**;

Select option 2. **Value added products**, and then 2 again for **Install Predictive Agent Blend** follow the instructions accordingly:

Have you stopped PDS processes: **y**

Following AES servers are configured:

10.10.16.96 Do you want to add another AES server: **n**

CTI password seems to be already set in /opt/avaya/pab/config/cti\_passwd.cfg

Do you wish to change the CTI password? **n**

AES\_LINK set to AVAYA#CM62#CSTA-S#AESSERVER62

Do you want to change it now?: **n**

AES\_USER set to pc501

Do you want to change it now?: **n**

Do you wish to configure Domains now?: **n**

Do you wish to change number of users that can be acquired for outbound calling now?: **n**

Now we'll install ACD extensions

Enter **q** to quit

When prompted, press any key to continue.

Enter **0** to exit, and **0** again

## 7.4. Configure master.cfg

Amendments to the master.cfg file were made as follows:

```
CALL_BLENDING:YES
DBSERVERIP:10.10.16.90
IICB_HOST:devconsd
INBNDSYS:NO
NAMESERVICEHOST:devconsd
PRIMARY:YES
SWITCHTESTMODE:NO
SWITCHTYPE:SOFTDIALER
SYSOPS:5
TRANSPORTS:1
TZ:EST5EDT
VISUAL_CPA:YES
WEBLMURL:http://10.10.16.90,8080/WebLM/LicenseServer:
```

## 7.5. Configure number format

The **phonefmt.cfg** file located in **/opt/avaya/pds/config** contains details of how Proactive Contact needs to manipulate numbers in the calling list in order to successfully place them via Communication Manager. The final line in the file is configured as follows:

```
STD TO DIALFMT:*:ALLTYPES:0:::
```

In this instance, of the digits dialed, **0** are deleted and the call is routed by Communication Manager. It is assumed Communication Manager has the necessary configuration required to route the call accordingly.

## 7.6. Configure Calling List

Proactive Contact is delivered with default calling lists. The author assumes an inbound and outbound calling list is created in Proactive Contact Editor. The administration of calling lists is outside of the scope of this document. For the purposes of the compliance test, calling list 4 (list4) was used for the outbound job and inbnd4 was used for the inbound job.. The calling list contains the phone numbers which must be dialed. The administered calling lists are shown below as displayed in the **/opt/avaya/pds/lists/calllistapp.tbl**

```
list2:OUTBOUND:ACTIVE:Outbound calling list:20110509:NO
```

## 7.7. Configure Avaya Proactive Contact Editor

In order for the Proactive Contact Editor application to communicate with the Proactive Contact Server, the PC on which it resides must be configured.

Edit **%WINDIR%\system32\drivers\etc\hosts** to include the hostname and IP address of the Proactive Contact Server, as follows:

```
10.10.16.90 devconsd
```

Ensure all necessary services are running on the Proactive Contact Server. The following commands start, check and stop the 3 services, the services must be stopped and started in the order shown. All services must be started before proceeding:

```
start_db
start_mts
start_pds
check_db
check_mts
check_pds
stop_pds
stop_mts
stop_db
```

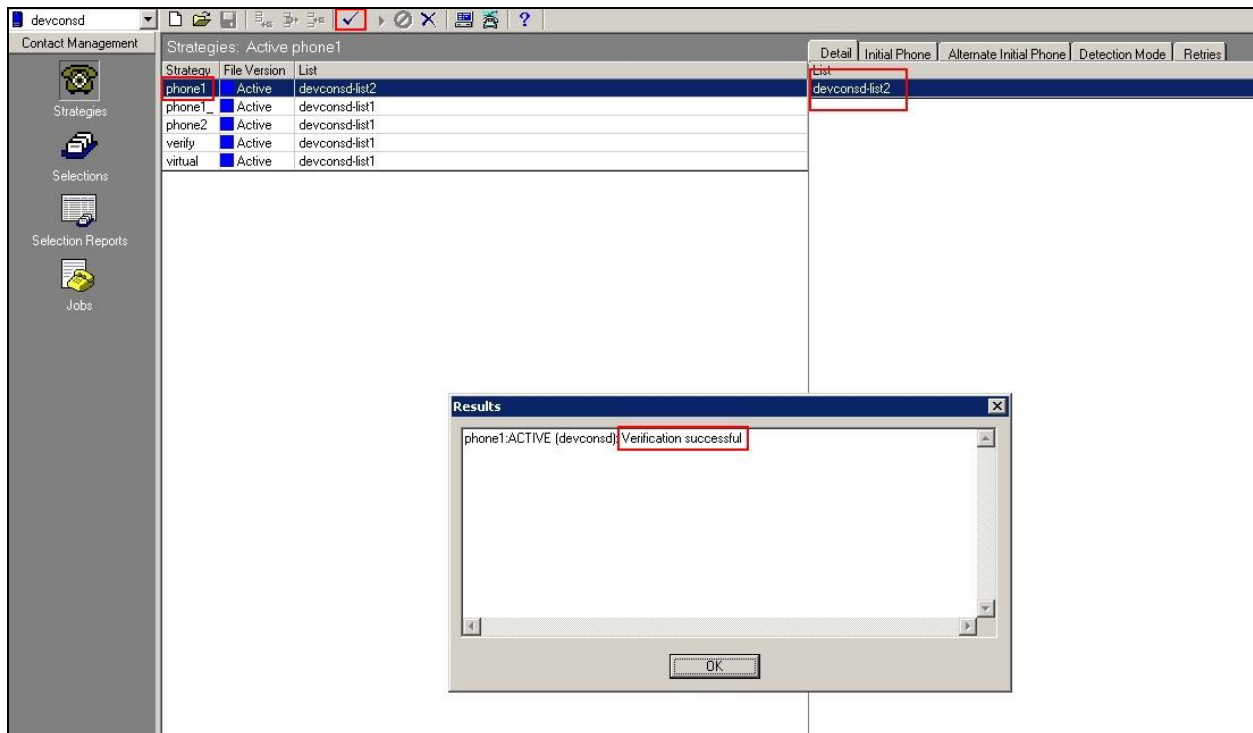


Double click on the **Health Manager** icon on the desktop to display the Configurator screen. Complete it as shown below, and click **OK**.

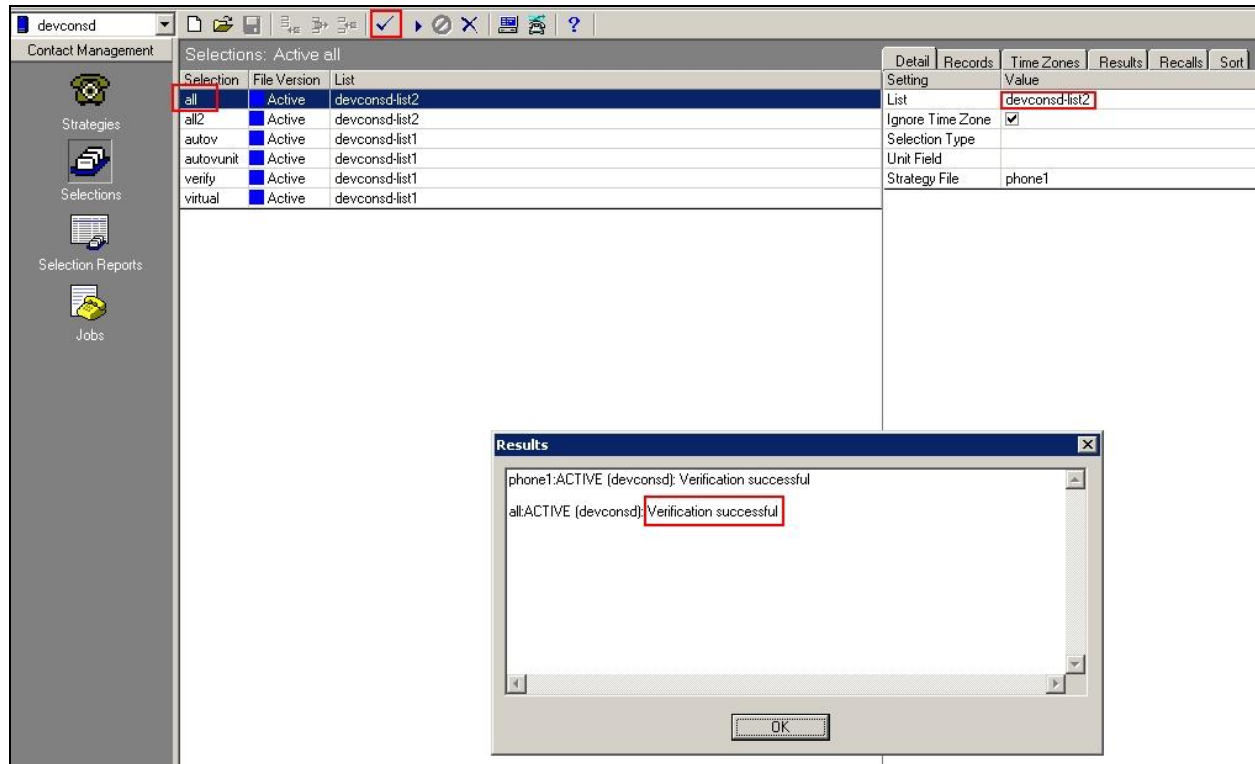
The screenshot shows a window titled "Configurator" with a close button (X) in the top right corner. Inside the window, there is a text box at the top that reads: "You can specify the Primary Dialer, Email Server and the Database Server details. Please re-run the Health Monitor after setting the details." Below this, there are three sections: "Primary Proactive Contact Details", "Email Server Details", and "Database Server Details". Each section has a "Name:" label and a text input field, and an "IP Address:" label and a text input field. The "Primary Proactive Contact Details" section has "devconsd" in the Name field and "10 . 10 . 16 . 90" in the IP Address field. The "Email Server Details" section has an empty Name field and "0 . 0 . 0 . 0" in the IP Address field. The "Database Server Details" section has "devconsd" in the Name field and "10 . 10 . 16 . 90" in the IP Address field. Below these sections is a checkbox labeled "Use primary server for email and database" which is currently unchecked. At the bottom of the window are two buttons: "OK" and "Cancel". The "OK" button is highlighted with a red rectangular box.

Log in to the Health Manager with the sysadm login credentials. Close Health Manager and double click on the Editor icon on the desktop. Log in with the sysadm login credentials.

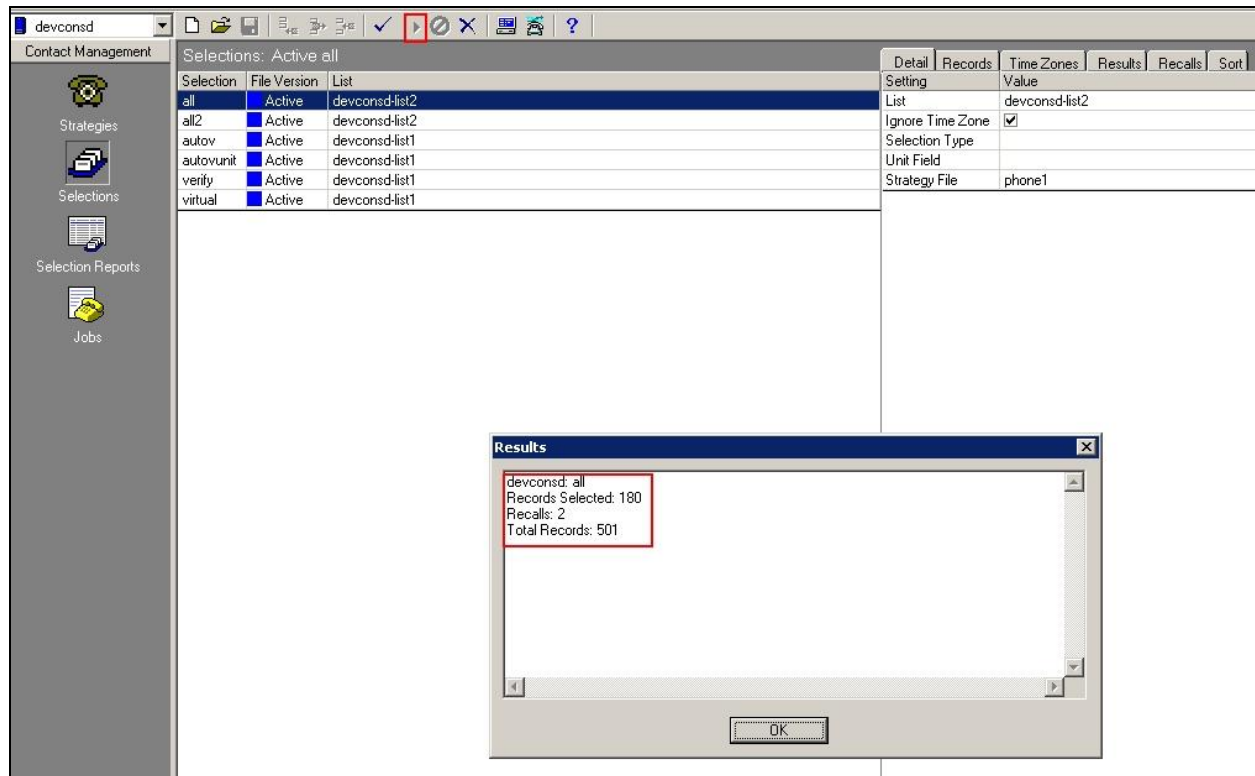
Assuming that strategy **phone1** and calling list **list2** (as specified in the previous section), are being used, configure editor as shown below and click verify, ensure verification is successful:



Click **Selections** from the left pane, select **all**, and specify calling list 2 from the right pane. Click the verify icon and ensure verification is successful:



Click the run icon, and ensure that the selection selected includes some records:



Click **Jobs** from the left pane. Select the **outbnd2** and configure as shown below. Note the outbound VDN 5813, configured on Communication Manager, is specified:

The screenshot shows the 'Jobs: Active outbnd2' configuration window. The left pane shows the 'Jobs' icon selected. The main pane displays a table of jobs and a 'Job Detail' pane on the right.

Job	Job type	File Version	Outbound list	Inbound list	Status
blend	Blend	Active	devconsd-list1	devconsd-inbnd1	Stopped
ciboodle1	Outbound	Active	devconsd-list3		Stopped
inbnd1	Inbound	Active		devconsd-inbnd1	Stopped
managed1	Managed	Active	devconsd-list2		Stopped
outbnd	Outbound	Active	devconsd-list3		Running
outbnd2	Outbound	Active	devconsd-list2		Stopped
verify	Outbound	Active	devconsd-list1		Stopped
virtual	Virtual	Active	devconsd-list1		Stopped

The 'Job Detail' pane for 'outbnd2' shows the following settings:

- Basic**
  - Job description: generic
  - Tagged trunk-to-trunk transfer data
  - Percentage complete of job to trigger callset of link job: 0
  - Line type(s) for use on job: REG
  - Earliest start time: 08:00
  - Latest stop time: 23:00
  - Calling party number (ANI): 02075550000
  - Calling party number (ANI) by record
  - Require unit ID for agent login: ☐
  - Transaction completion code(s): 93
- Call Pacing**
  - Call Pacing Method: Expert Calling Ratio
  - Expert calling ratio: W0
  - Initial hit rate: 50
  - Minimum hit rate: 20
  - Cell Phone Campaign Call Progress (valid values 1-4, 0 for regular campaigns): 0
- Files**
  - Outbound calling list: devconsd-list2
  - Record selection file name: all
  - Outbound screen(s): list1
  - Agent keys definition file name: ag\_cmd1
  - Do Not Call group name: DNC
  - Name of next job to link to
  - Name of inbound job to transfer calls to: inbnd1
- Interactive Voice Response**
  - Allow IVR agents on job: ☐
  - IVR identifier
  - Initial script to run on the IVR
  - Script to run on the IVR
- Job Type**
  - Transaction verification job: ☐
  - Run job without agents: ☐
  - Run job with OFCOM: ☐
  - Start Ofcom timer when: Customer begins to speak
- Labels**
  - Script label to use for making call: wait1\_f
  - Main data processing label: generic
  - Script label to use OFCOM
- Managed Dialing**
  - Managed (preview) dialing: ☐
  - Allow agents to cancel call in preview mode: ☐
  - Time limit (seconds) for preview: 15
  - Display empty record at preview: ☐
  - Allow dialing from deleted record: ☐
  - Method for record search at preview (LIS, HASH, NONE): NONE
  - Key field for LIS record search
- Outbound Processing**
  - Shutdown job when no more calls remain: ☐
  - Make alternate phone lowest priority in selecting next record: ☐
  - Order calling of records by time zone: ☐
  - VDN needed by the CTI Dialer only: 5813
- Post Processing**

Continued from previous screenshot:

<b>Post Processing</b>	
Automatically start Update mode on customer hang-up	<input type="checkbox"/>
<b>Quota Settings</b>	
Quota setting (completion code,quota)	
Quota settings file name	
Save quota setting when the job ends	<input type="checkbox"/>
<b>Recall</b>	
Recall reschedule interval (minutes)	10
Recall notification time (minutes)	2
Number of recall attempts	2
Auto assign recall from Infinite job to agents on another job	<input type="checkbox"/>
Name of the job to get agent for recall	
<b>Service Level</b>	
Desired service level (percentage)	
Time to connect tolerance (seconds)	
Ofcom Timer	2
<b>Wait Queues</b>	
Total wait delay (seconds)	90
Number of message to play while on hold awaiting transfer	

Click verify and ensure verification completes successfully.

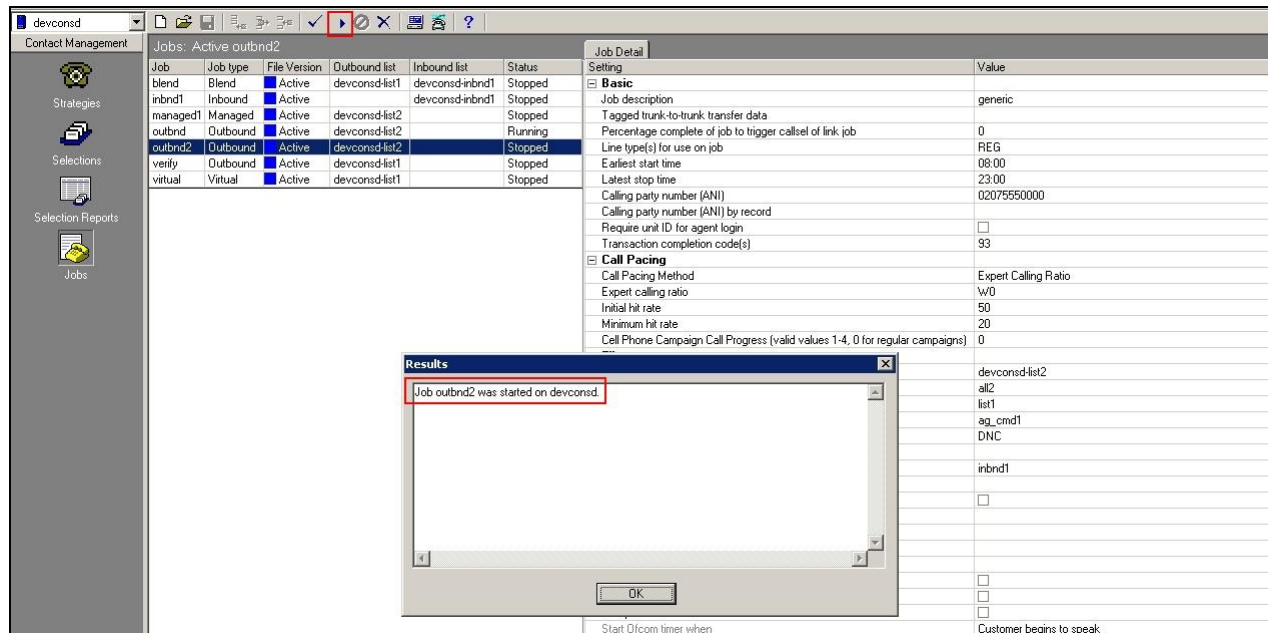
The screenshot shows the 'devconsd' application interface. On the left is a sidebar with icons for 'Contact Management', 'Strategies', 'Selections', 'Selection Reports', and 'Jobs'. The main area is divided into two panes. The left pane displays a table of jobs:

Job	Job type	File Version	Outbound list	Inbound list	Status
blend	Blend	Active	devconsd-list1	devconsd-inbnd1	Stopped
inbnd1	Inbound	Active		devconsd-inbnd1	Stopped
managed1	Managed	Active	devconsd-list2		Stopped
outbnd	Outbound	Active	devconsd-list2		Running
outbnd2	Outbound	Active	devconsd-list2		Stopped
verify	Outbound	Active	devconsd-list1		Stopped
virtual	Virtual	Active	devconsd-list1		Stopped

The right pane shows the 'Job Detail' for the selected job, 'outbnd2'. It includes sections for 'Basic' (Job description, Tagged trunk-to-trunk transfer data, Percentage complete of job to trigger callset of link job, Line type(s) for use on job, Earliest start time, Latest stop time, Calling party number (ANI), Calling party number (ANI) by record, Require unit ID for agent login, Transaction completion code(s)) and 'Call Pacing' (Call Pacing Method, Expert calling ratio, Initial hit rate, Minimum hit rate, Cell Phone Campaign Call Progress (valid values 1-4, 0 for regular campaigns)).

A 'Results' dialog box is open in the foreground, displaying the message: 'outbnd2:ACTIVE (devconsd): Verification successful'. The dialog has an 'OK' button at the bottom.

Start job by click the start icon, highlighted in the screenshot below.



The outbound job is now running, and Proactive Contact will be initiating outbound calls for Proactive Contact Agents, once logged in. In this instance, synTelate Agent is used to log in both the Proactive Contact Agent, and the Communication Manager ACD Agent. If the job fails to run as expected, ensure the outbound job file within the **/opt/avaya/pds/job/** directory has the following parameters set:

```
TESTMODE::
TESTOPER::
```

## 8. 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

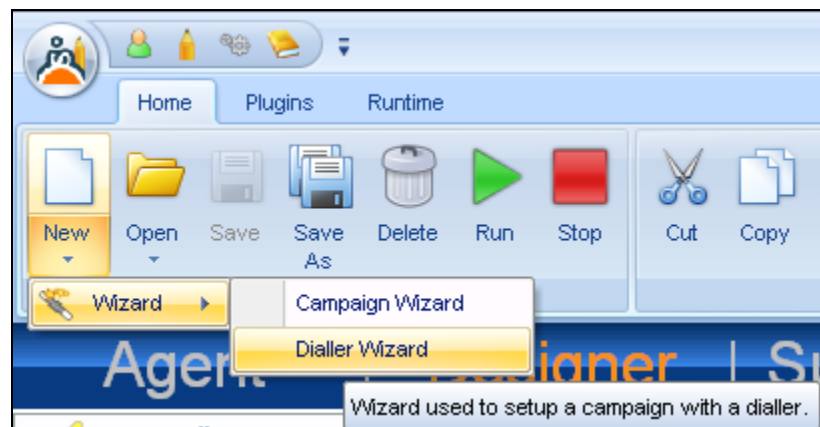
### 8.1. Administer Moagent32.ini

From the PC running Designer, navigate to the **C:\WINDOWS\system32** directory to locate the **Moagent32.ini** file. Amend this file as shown below and save to the **C:\WINDOWS** directory.

```
[logon]
servername = 10.10.16.90
headset =
[ConfigSettings]
UseDIIDbs=0
```

### 8.2. Launch Designer

From the PC running Designer, select **Start → Programs → synTelate → synTelate Designer** (not shown) to display the **Welcome - synTelate** screen (not shown). Select the **Designer** tab (not shown). From the top menu, select the **Home** tab. Click **New** and select **Wizard → Dialler Wizard** from the drop-down list to create a new campaign.





### 8.3. Administer campaigns

The **Step 1 of 6 - Basic Campaign Details** screen is displayed. Enter the following values shown, and retain the default values for the remaining fields.

**Campaign Wizard with Avaya Proactive Contact**

**Step 1 of 6 - Basic Campaign Details**  
Please enter basic details for the campaign

Database \*  
synRun

Name \*  
Compliance\_Testing\_Campaign

Password \*  
\*\*\*\*\*

Start Date  
12/05/2011

End Date  
11/05/2012

Description

Notes

Navigation buttons: Left arrow, Right arrow, Cancel (X)

Click on the arrow pointing right. The **Avaya PCS Login** screen is displayed. Enter the credentials for the Proactive Contact supervisor and click on the green tick.

**Avaya PCS Login**

Agent Name  
sysadm

Password  
\*\*\*\*\*

Buttons: Green checkmark, Red X

The **Step 2 of 6 – Choose Data Source** 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**. Click on the arrow pointing right to proceed to **Step 3**.

The screenshot shows a software window titled "Campaign Wizard with Avaya Proactive Contact". The window has a blue header bar with standard window controls (minimize, maximize, close) on the right. Below the header, the title "Step 2 of 6 - Choose Data Source" is displayed, followed by the instruction "Please specify the data source for the campaign".

The main content area contains several form fields:

- Call List \***: A dropdown menu with "list2" selected.
- Job Name \***: A dropdown menu with "outbnd2" selected, accompanied by a three-dot menu icon.
- Client Status Table \***: A dropdown menu with "outbnd2" selected.
- Job Type**: A group box containing two radio buttons: "Inbound" (unselected) and "Outbound" (selected).
- Incoming DDI**: A text input field with a three-dot menu icon to its right.
- Additional Jobs**: A large, empty text area.

At the bottom right of the window, there are three navigation buttons: a left-pointing arrow, a right-pointing arrow, and a red circle with a diagonal line through it (prohibit sign).

The **Step 3 of 6 – Database Behaviour** screen is displayed, complete as shown and click on the arrow pointing right to proceed to **Step 4**.

The screenshot shows a window titled "Campaign Wizard with Avaya Proactive Contact". The main heading is "Step 3 of 6 - Database Behaviour". Below the heading is a instruction: "Please specify the desired behaviour of the Client Status Table record in the database when a call is popped." The main content area is titled "Client Record" and contains two options: "Create New" (selected with a radio button) and "Match Existing On Field" (unselected with a radio button). The "Create New" option has a "Save To Database" checkbox checked. Below the "Create New" option is the text "Create a new record in the Client Status Table for each PCS call". Below the "Match Existing On Field" option is a dropdown menu and the text "Display an existing record in the Client Status Table for each PCS Call". At the bottom right of the window are three buttons: a left arrow, a right arrow, and a red circle with a slash.

**Campaign Wizard with Avaya Proactive Contact**

**Step 3 of 6 - Database Behaviour**

Please specify the desired behaviour of the Client Status Table record in the database when a call is popped.

**Client Record**

☒ **Create New** ☒ **Save To Database**

*Create a new record in the Client Status Table for each PCS call*

☐ **Match Existing On Field**

*Display an existing record in the Client Status Table for each PCS Call*

Navigation buttons: Left arrow, Right arrow, Cancel (red circle with slash).

The **Step 4 of 6 – Dialer Field Mappings** screen is displayed.

**Campaign Wizard with Avaya Proactive Contact**

**Step 4 of 6 - Dialer Field Mappings**

Please specify which fields from the dialer will be mapped to fields in the Client Status Table.

Available Fields		Selected Fields
ACCTNUM	>	
BALANCE		
CITY	>>	
COMMENT1		
FINOPER	<	
FRTHDATE1		
FRTHTIME1	<<	
NAME		
NAME1		
NAME2		
PHONE1		
PHONE2		
STATE		
SVJCODE		
TOTALDUE		
ZIPCODE		

Navigation buttons: < > << >> < > << >>

Click on the double arrow, highlighted below, to select all fields and click on the arrow pointing right to proceed to **Step 5**.

**Campaign Wizard with Avaya Proactive Contact**

**Step 4 of 6 - Dialler Field Mappings**

Please specify which fields from the dialler will be mapped to fields in the Client Status Table.

Available Fields		Selected Fields
	>	ACCTNUM
	>>	BALANCE
		CITY
		COMMENT1
		FINOPER
		FRTHDATE1
		FRTHTIME1
		NAME
		NAME1
		NAME2
		PHONE1
		PHONE2
		STATE
		SVJCODE
		TOTALDUE
		ZIPCODE
	<	
	<<	

Navigation buttons: < > << >> <X>



The **Step 5 of 6 - outbnd2 - Fields** screen is displayed, amend as required and click on the arrow pointing right to proceed to **Step 6**.




**Campaign Wizard with Avaya Proactive Contact**

**Step 5 of 6 - outbnd2 - Fields**

Please check the data types and lengths and edit where required. Add any additional fields where necessary.

Field Name	Call List Field	Type	Length	Decimals	Exists	Modified	Delete
ACCTNUM	ACCTNUM	varchar	25	-	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BALANCE	BALANCE	numeric	20	4	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CITY	CITY	varchar	25	-	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
COMMENT1	COMMENT1	varchar	60	-	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
FINOPER	FINOPER	varchar	8	-	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
FRTHDATE1	FRTHDATE1	datetime	10	-	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
FRTHTIME1	FRTHTIME1	datetime	10	-	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
NAME	NAME	varchar	20	-	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
NAME1	NAME1	varchar	25	-	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The **Step 6 of 6 - Summary** screen is displayed. Confirm the settings and click on the Door icon to complete the Wizard.

The screenshot shows the 'Campaign Wizard with Avaya Proactive Contact' window. The title bar includes standard Windows window controls. The main content area is titled 'Step 6 of 6 - Summary' and contains the instruction: 'Please ensure all details are correct. To alter details, navigate to the respective page.' Below this is a tabbed interface with four tabs: 'Campaign Details' (selected), 'Data Source', 'Database Behaviour', and 'Additional Jobs'. The 'Campaign Details' tab contains the following fields: 'Database' (synRun), 'Name' (Compliance\_Testing\_Campaign), 'CPGNo' (88), 'Description' (empty text area), 'Notes' (empty text area), 'Start Date' (12/05/2011), and 'End Date' (11/05/2012). At the bottom right of the form is a checkbox labeled 'Open Campaign Desktop'. The bottom of the window features a blue bar with three navigation icons: a blue left arrow, a red door icon (highlighted with a red rectangle), and a red prohibition sign. The 'synTelate' logo is visible in the bottom left corner of the window.

## 8.4. Administer scripts and screens

For the purposes of this compliance test, it is assumed that scripts and screens are created according to requirements. A sample screen is shown below:

Running - synTelate

Home

Cut Copy Paste Delete Undo Zoom Dialler Utility Dial / Answer / Complete Preview Hangup Hold / Retrieve Ready Redirect Call Save

Cut Copy Paste CTI Save New Delete

Good Afternoon

JOHN DOE

JOHN DOE

Details

**Compliance Outbound 2 Test**

AcctNum 5300292120986830

Name JOHN DOE JOHN DOE

Address

7401

Phone 1 2032323423

Phone 2 0000000000

Comments

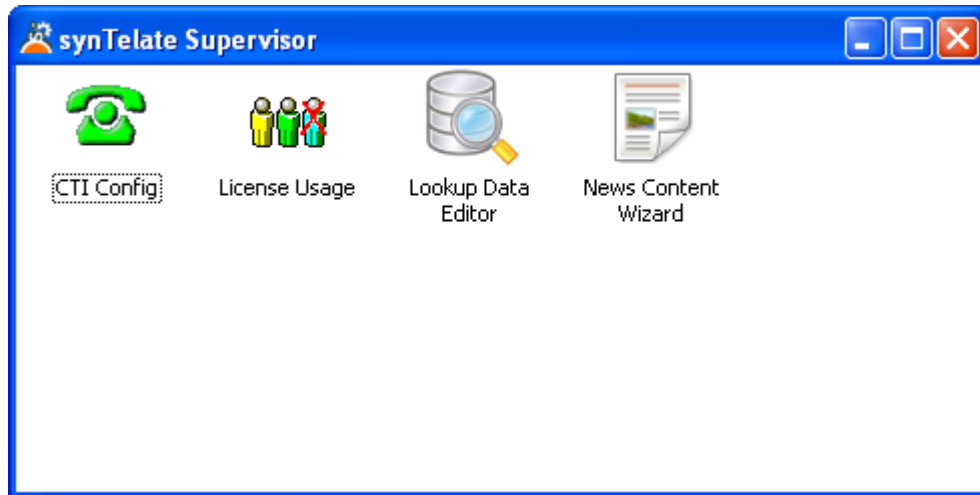
Complete Call (21) Set Recall

OUTBOUND : Home phone - 2032323423 Ready synTelate Server - Not Required

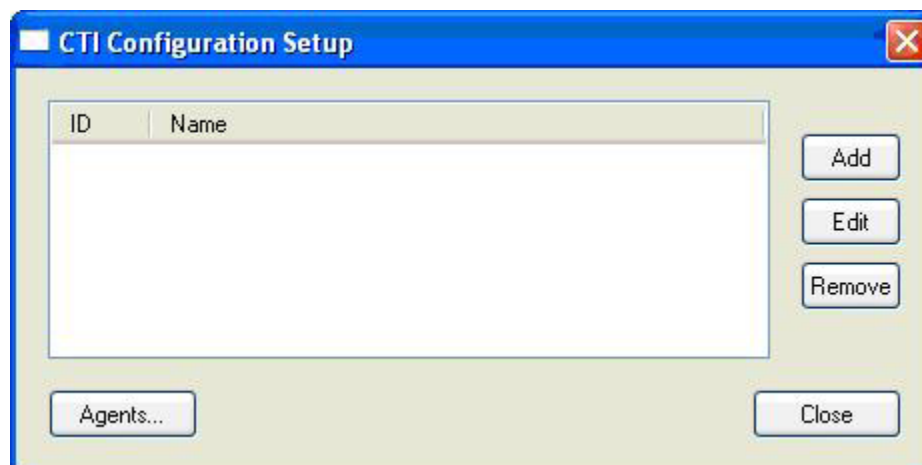


## 8.5. Administer CTI

Open Select the **Supervisor** tab (not shown) in synTelate Designer and click on **CTI Config**.



Click **Add** to setup CTI configuration.



The **Edit CTI Config Details** screen is displayed. Complete as shown below.

**Edit CTI Config Details**

Name ID: 2  
Avaya PC5 with PAB

Telephony Server  
Avaya PDS

☐ Auto Login External Prefix Extension Length  
3

☒ Enabled for undefined Agents Ring Delay

Pass Through Telephony Server  
TSAPI based switch

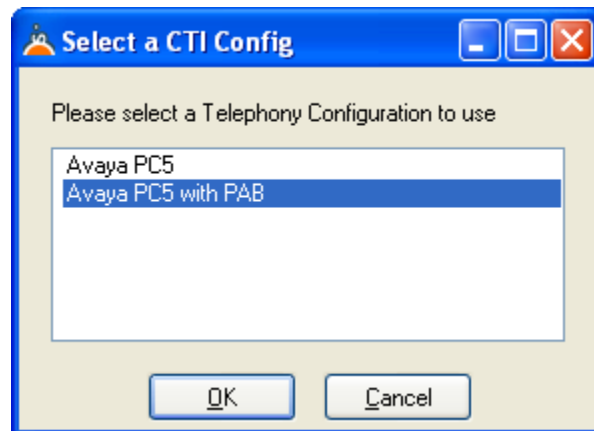
OK Cancel

## 9. Verification Steps

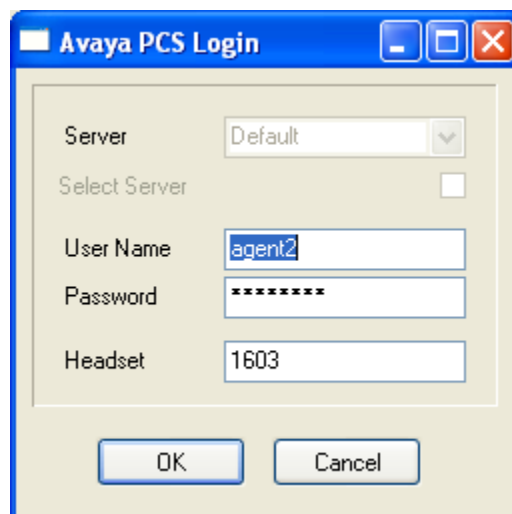
This section provides the tests that can be performed to verify proper configuration of synTelate, Proactive Contact, and Application Enablement Services. Prior to verification, start an outbound job on Proactive Contact.

### 9.1. Verify synTelate

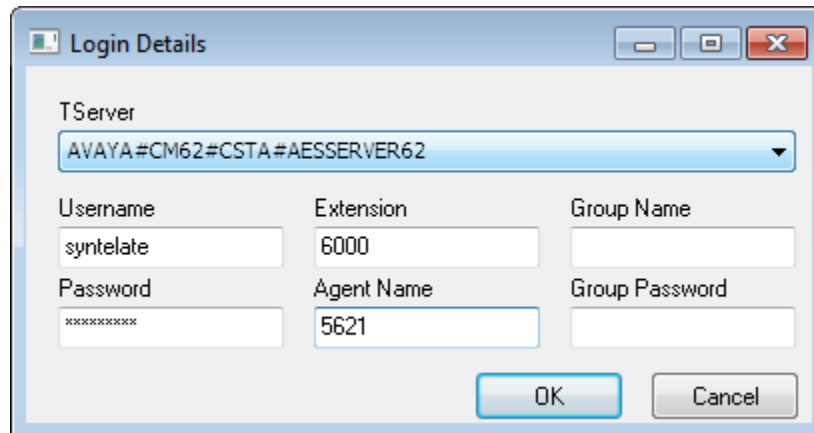
From the PC running synTelate Agent, select **Start → Programs → synTelate → synTelate Agent**. The **Select a CTI Config** screen is displayed next. Select the CTI from **Section 8.5**, as shown below.



The **Avaya PCS Login** screen is displayed. Enter the pre-defined agent login and password for Proactive Contact, and the agent station/headset number detailed above.



The **Login Details** screen is displayed. Enter the values as shown:

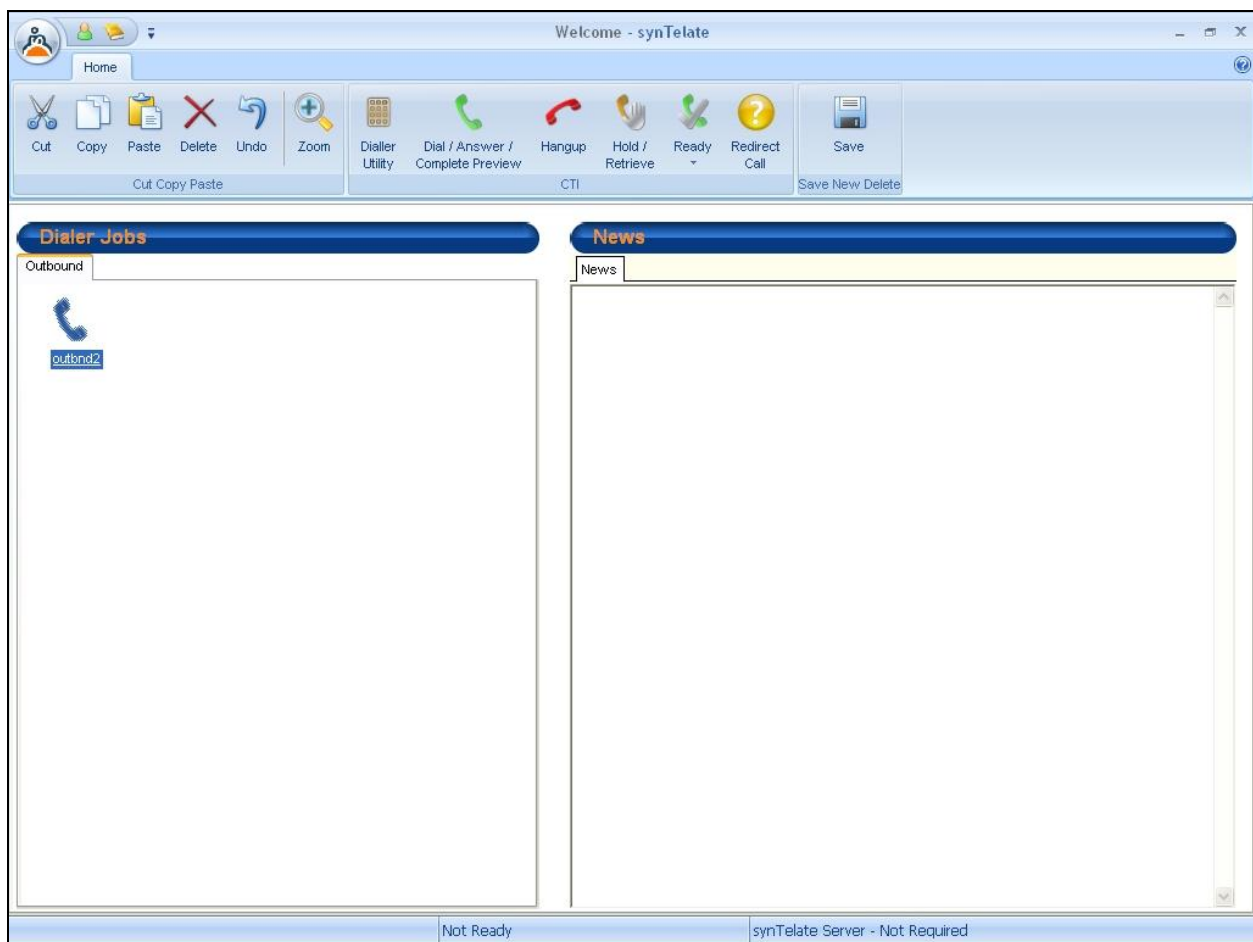


The 'Login Details' dialog box contains the following fields and values:

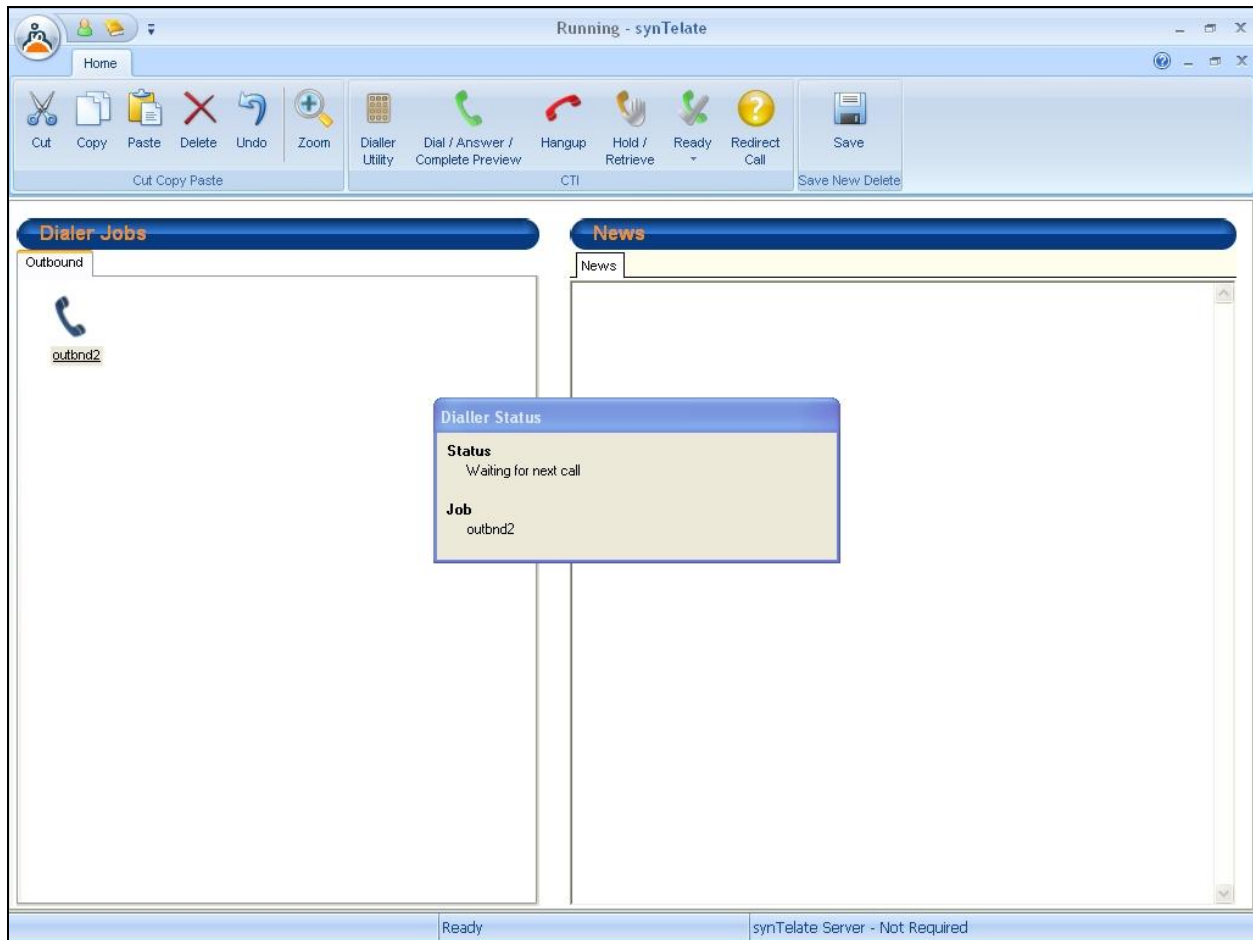
TServer		
AVAYA#CM62#CSTA#AESSERVER62		
Username	Extension	Group Name
syntelate	6000	
Password	Agent Name	Group Password
xxxxxxxx	5621	

Buttons: OK, Cancel

synTelate opens with welcome screen showing list of available jobs, Verify the active outbound job is displayed. Click **outbnd2**.



The **Dialler Status** box is displayed. 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 8.4** is displayed and populated with values retrieved from the customer record, as shown below:

The screenshot shows the 'Running - synTelate' application window. The title bar includes standard window controls and the text 'Running - synTelate'. Below the title bar is a menu bar with 'Home'. A toolbar contains various icons for actions like Cut, Copy, Paste, Delete, Undo, Zoom, and CTI functions (Dialler Utility, Dial / Answer / Complete Preview, Hangup, Hold / Retrieve, Ready, Redirect Call, Save). The main content area is divided into a left sidebar and a main panel. The sidebar has a 'Good Afternoon' greeting and two input fields, both containing 'JOHN DOE'. The main panel has a 'Details' tab and a large yellow banner with the text 'Compliance Outbound 2 Test'. Below the banner is a form with the following fields: 'AcctNum' (5300292120986830), 'Name' (JOHN DOE), 'Address' (7401), 'Phone 1' (2032323423), 'Phone 2' (0000000000), and 'Comments'. At the bottom of the form are two buttons: 'Complete Call (21)' and 'Set Recall'. The status bar at the bottom of the window displays 'OUTBOUND : Home phone - 2032323423', 'Ready', and 'synTelate Server - Not Required'.

AcctNum	5300292120986830
Name	JOHN DOE
Address	7401
Phone 1	2032323423
Phone 2	0000000000
Comments	

Complete Call (21) Set Recall

OUTBOUND : Home phone - 2032323423 Ready synTelate Server - Not Required

## 9.2. Verify Avaya Proactive Contact

From Proactive Contact shell, type the command **jobmon** to verify agent is logged into the job outbnd2:

```
[STANDARD]                               Job Activity
[ALLID]

                               Summary Statistics
                               Job: [outbnd2][69]
                               Start time: 09.43.20   Current time: 10.16.55

Agent Activity                     Line Usage
-----
-
      All Outb      ACD      PTP  Outbound Lines      Cur  Avg  Peak
Logged in:   1      1      1      0      Demand:      1   1   1
Assigned :   1      1                      Available :   17
On Phone :   1      1                      Total Lines :   18

Calling Activities
-----
-
Outbound Phone Calls
Records Selected:      335
Phone Calls made:      3
Cur/Run Hit Rate:    100/100%
Agent Connects :      1
Queue           :      0
Recalls         :      0
Phone Calls Left:    168

[ Job outbnd2 ready for calling ]
```

### 9.3. Verify Avaya Aura® Application Enablement Services

On AE Services, verify the status of the TSAPI link by selecting **Status** → **Status and Control** → **TSAPI Service Summary** from the left pane. The **TSAPI Link Details** screen is displayed. Verify the **Status** is **Talking** for the TSAPI link administered in **Section 6.4**, as shown below.

The screenshot shows the 'TSAPI Link Details' screen. The left navigation pane has 'Status and Control' expanded, and 'TSAPI Service Summary' is selected. The main content area shows a table with the following data:

Link	Switch Name	Switch CTI Link ID	Status	Since	State	Switch Version	Associations	Msgs to Switch	Msgs from Switch	Msgs Period
1	CM62	1	Talking	Fri Jan 25 14:29:32 2013	Online	16	1	239	239	30

Below the table, there are buttons for 'Online' and 'Offline'. At the bottom, there are tabs for 'TSAPI Service Status', 'TLink Status', and 'User Status'.

## 10. Conclusion

These Application Notes describe the configuration steps required for synTelate to successfully interoperate with Avaya Proactive Contact with CTI using agent blending. All feature test cases were completed, with observations noted in **Section 2.2**.

## 11. Additional References

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

1. *Administering Avaya Proactive Contact*, Release 5.0, April 2012, available at <http://support.avaya.com>.
2. Release Notes for Avaya Proactive Contact 5.0.1 Dialer and Database available at <http://support.avaya.com>.

For additional information or documentation on Inisoft synTelate R4.3, please contact Inisoft or visit <http://www.inisoft.co.uk>



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