# AVAYA

**Avaya Solution & Interoperability Test Lab**

# Application Notes for Initiative Software synTelate with Avaya Proactive Contact - Issue 1.0

## Abstract

These Application Notes describe the configuration steps required for Initiative Software synTelate to successfully interoperate with Avaya Proactive Contact with Computer Telephony Interface. synTelate is a call centre scripting application for creating inbound and outbound campaigns and consists of the synTelate Designer and the synTelate Agent. synTelate Agent was compliance tested against the Avaya Proactive Contact 3.0.1 (PC3).

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

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# 1. Introduction

These Application Notes describe a compliance-tested configuration comprised of Avaya Proactive Contact 3.0.1 (PC3), Avaya Communication Manager and Initiative Software synTelate 3.0.

synTelate is a call centre scripting application for creating inbound and outbound campaigns. synTelate consists of the synTelate Designer and the synTelate Agent. synTelate Agent 3.0 was compliance tested against the Avaya Proactive Contact 3.0.1 (PC3). In the configuration described in these Application Notes, synTelate uses the Avaya Agent API to communicate with Avaya Proactive Contact 3.0.1 (PC3). synTelate Designer is a graphical tool that is used for the definition of the call flow and agent screens. The synTelate database consists of client records that are used during inbound and outbound campaigns. The Avaya PC3 call list is mapped to the synTelate database.

There are several system deployment options for Avaya Proactive Contact 3.0. The deployment used in this integration is the Avaya Proactive Contact with Computer Telephony Interface (CTI). A TSAPI CTI link is configured between Avaya Proactive Contact 3.0 and Avaya Communication Manager via Avaya Application Enablement Services (AES) in this test environment. This CTI link is used with the Predictive Agent Blending feature on Avaya PC3 to allow agents to handle both inbound and outbound calls. synTelate agent interfaces to Avaya PC3 via the Avaya PC3 Agent API DLL (Moagent32.dll). The Avaya PC3 Agent API defines a set of messages exchanged between the synTelate agent application and the Avaya PC3 server over a TCP/IP socket connection to control the agent's work session. This allows 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. In the tested configuration, outbound, inbound, managed and blended jobs were supported by synTelate agent.
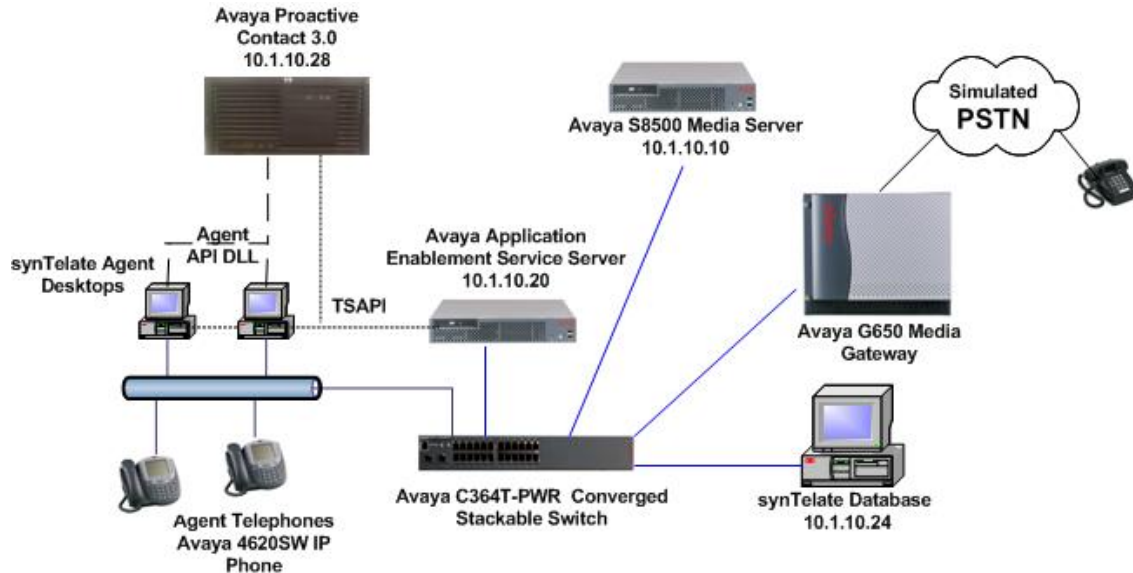
**Figure 1: Avaya Proactive Contact 3.0.1 in Proactive Agent Blend mode and Initiative Software synTelate Compliance Test Configuration**

## 2. Equipment and Software Validated

The following equipment and software were used for the sample configuration.

| Equipment | Software |
|-----------|----------|
| Avaya Proactive Contact 3.0.1 Manager | 3.0.1 |
| Avaya S8500 Media Server running Avaya Communication Manager 3.0 | 3.1.2 (R013X.01.2.632.1) |
| Avaya G650 Media Gateway | N/A |
| Application Enablement Services Server | 3.1.1 Patch 1, Build 43.2 |
| Avaya C364T-PWR Converged Stackable Switch | 4.3.12 |
| Avaya 4620SW IP Telephones | 2.3 |
| Avaya Agent API – Moagent32.dll | 3.0.0.37 |
| synTelate Agent PCs | 3.0 |
| synTelate Designer PC | 3.0 |
| Operating System for synTelate Agent and Designer | Windows XP |
| synTelate Database | MSSQL2000 |

## 3. Configure Avaya Proactive Contact 3.0

There are three possible system deployments of Avaya Proactive Contact 3.0.
- Avaya Proactive Contact with Computer Telephony Interface (CTI)
- Avaya Proactive Contact with Avaya Proactive Contact Gateway PG230
- Avaya Proactive Contact with the traditional system cabinet

The compliance testing was configured with Avaya Proactive Contact with CTI only. Avaya Proactive Contact with CTI is a software solution that uses the Telephony Services API (TSAPI) of Avaya Application Enablement Services (AES) and Avaya Communication Manager.

These Application Notes assume that Avaya Proactive Contact 3.0 with CTI is configured and operational for outbound and managed jobs. The Predictive Agent Blending feature of Avaya PC3 integrates outbound calling activities on Avaya PC3 with inbound calling activities on the ACD of Avaya Communication Manager. The following features should have already been configured on Avaya PC3.

- Predictive Agent Blending
- Completion Codes
- Agent Owned Recall
- Recall/Callback
- Agent Playable Message
- Autowrap
- Job Linking
- Shadow Jobs

.

## 3.1. Calling List Fields Configuration files

The calling list contains the customer records. The calling list fields are configured in the list configuration files (i.e. list5.fdict), located in the /opt/avaya/pds/lists folder on the Avaya PC3 server. The following highlighted fields were mapped to the synTelate fields in Section 6.1, Step 9.

```
RECLEN:990:
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:
ORIGINALJOBNAME:20:C:Original Job Name
AGENT:8:C:AGENT ID:
DTE:10:D:SYSTEM DATE:
```

# 4. Configure Avaya Communication Manager

The following steps provide an overview of the configuration needed on Avaya Communication Manager to support the  Proactive Agent Blending feature for Avaya PC3.  It is assumed that the Avaya PC3 integration has been properly configured and is operational. For all other provisioning information, please refer to the Avaya Communication Manager product documentation in Section 11.

## 4.1. Administer Avaya Communication Manager for Proactive Agent Blending

In a Proactive Agent Blending system, ACD agents log on to the Avaya PC3 and the ACD. Agent Blending monitors the activity on the ACD and uses this information to determine when to acquire agents for outbound calling and when to release ACD agents to handle inbound calls. The screens in this section are from the System Access Terminal (SAT).  Log in with the appropriate credentials.

| Step | Description |
|------|-------------|
| 1. | Verify that the Avaya Communication Manager license has proper permissions for features illustrated in these Application Notes. Enter the **display system-parameters customer-options**. On the OPTIONAL FEATURES screen, verify that **Computer Telephony Adjunct Links**? is set to "y" as shown below.<br><br><pre>display system-parameters customer-options              Page   3 of  11<br>                          OPTIONAL FEATURES<br><br>     Abbreviated Dialing Enhanced List? n        Audible Message Waiting? n<br>           Access Security Gateway (ASG)? n             Authorization Codes? n<br>         Analog Trunk Incoming Call ID? n Backup Cluster Automatic Takeover? n<br> A/D Grp/Sys List Dialing Start at 01? n                      CAS Branch? n<br>Answer Supervision by Call Classifier? y                      CAS Main? n<br>                                  ARS? y            Change COR by FAC? n<br>                 ARS/AAR Partitioning? y  **Computer Telephony Adjunct Links? y**<br>            ARS/AAR Dialing without FAC? y  Cvg Of Calls Redirected Off-net? n<br>                ASAI Link Core Capabilities? n                DCS (Basic)? n<br>                ASAI Link Plus Capabilities? n            DCS Call Coverage? n<br>            Async. Transfer Mode (ATM) PNC? n            DCS with Rerouting? n<br>        Async. Transfer Mode (ATM) Trunking? n<br>                ATM WAN Spare Processor? n   Digital Loss Plan Modification? n<br>                                 ATMS? n                        DS1 MSP? n<br>                     Attendant Vectoring? n          DS1 Echo Cancellation? n</pre> |

| 2. | On Page 6, CALL CENTER OPTIONAL FEATURES form of the system-parameters customer options, verify the following options are set to "y" as shown below. |
|---|---|

```
display system-parameters customer-options                    Page   6 of  11
                        CALL CENTER OPTIONAL FEATURES

                          Call Center Release: 3.0

                          ACD? y                            Reason Codes? n
               BCMS (Basic)? n                   Service Level Maximizer? n
       BCMS/VuStats Service Level? n             Service Observing (Basic)? y
BSR Local Treatment for IP & ISDN? n     Service Observing (Remote/By FAC)? y
              Business Advocate? n               Service Observing (VDNs)? y
               Call Work Codes? n                            Timed ACW? n
    DTMF Feedback Signals For VRU? n             Vectoring (Basic)? y
            Dynamic Advocate? n               Vectoring (Prompting)? y
   Expert Agent Selection (EAS)? y           Vectoring (G3V4 Enhanced)? n
                     EAS-PHD? n               Vectoring (3.0 Enhanced)? n
            Forced ACD Calls? n      Vectoring (ANI/II-Digits Routing)? n
        Least Occupied Agent? n      Vectoring (G3V4 Advanced Routing)? n
     Lookahead Interflow (LAI)? n                    Vectoring (CINFO)? n
Multiple Call Handling (On Request)? n     Vectoring (Best Service Routing)? n
   Multiple Call Handling (Forced)? n              Vectoring (Holidays)? n
  PASTE (Display PBX Data on Phone)? n              Vectoring (Variables)? n
```

| 3. | Enter the **add cti-link n** command, where "n" is an available CTI link number. Enter an available extension number in the **Extension** field. Set **Type** to "ADJ-IP" and enter a descriptive name in the **Name** field. **Note:** This step assumes that the connection between Avaya Communication Manager and Avaya Application Enablement Services is already established. This can be confirmed by entering the command **status aesvcs link**. |
|---|---|

```
add cti-link 3                                          Page   1 of   2
                            CTI LINK
  CTI Link: 3
 Extension: 13000
      Type: ADJ-IP
                                                              COR: 1
      Name: TSAPI link 3
```

| 4. | Below is a table of the configuration of the VDNs, Vectors, Huntgroups and Agent Logins configured for the Proactive campaign during compliance testing. PC3 Acquire-Out is used by Avaya PC3 to acquire the synTelate agents for outbound calls and PC3 Inbound is configured to route inbound calls to the synTelate agents. |
|---|---|

|  | **PC3 Adjunct Route** | **PC3 Acquire-Out** | **PC3 Inbound** |
|---|---|---|---|
| **VDN** | 17100 | 17101 | 17102 |
| **Vector** | 100 | 101 | 102 |
| **Skill Ext/ Huntgroup** |  | 16101/101 | 16102/102 |
| **Agent Login** |  | 15101 | 15102 |

| | |
|---|---|
| 5. | Enter the **change vector n** command, where **n** is an unused vector number. This vector will be used by the CTI link configured in Section 4.1 Step 3. Below is a sample vector configured with an **adjunct routing link** step. This vector will be used by PC3 to make outbound calls. |

```
change vector 100                                          Page   1 of   3
                            CALL VECTOR

    Number: 100               Name: PC3 Adjunct Rt
Multimedia? 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? n   Holidays? n
 Variables? n   3.0 Enhanced? n
01 adjunct         routing link 3
02 wait-time    2   secs hearing silence
03
```

| | |
|---|---|
| 6. | Enter the **add vdn n** command, where **n** is an unused Vector Directory Number (VDN). Configure a **Vector Directory Number** (VDN) for the **vector** administered in Step 5. |

```
add vdn 17100                                              Page   1 of   2
                      VECTOR DIRECTORY NUMBER

                         Extension: 17100
                              Name: PC3 Adjunct Route
                     Vector Number: 100

                 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:
```

| | |
|---|---|
| 7. | Enter the **add hunt-group n** command, where "n" is an unused hunt group number. On page 1 of the **hunt group** form, assign a **Group Name** and **Group Extension** valid under the provisioned dial plan. Set the following options to "y" as shown below.<br><br>```<br>add hunt-group 101                                          Page   1 of   3<br>                          HUNT GROUP<br><br>            Group Number: 101                              ACD? y<br>              Group Name: PC3 Aquire                     Queue? y<br>         Group Extension: 16101                          Vector? y<br>              Group Type: ucd-mia<br>                      TN: 1<br>                     COR: 1                    MM Early Answer? n<br>           Security Code:            Local Agent Preference? n<br>    ISDN/SIP Caller Display:<br>```<br><br>On Page 2 of the HUNT GROUP form set the **Skill** to "y" as shown below.<br><br>```<br>add hunt-group 101                                          Page   2 of   3<br>                          HUNT GROUP<br><br>                    Skill? y<br>                      AAS? n<br>                 Measured: none<br>       Supervisor Extension:<br><br>        Controlling Adjunct: none<br>``` |
| 8. | Repeat the above step and create a hunt group with hunt-group extension 16102 for Inbound calls. |
| 9. | Enter the **change vector n** command, where "n" is associated to hunt group 1. Enter the commands to queue to skill 1 as shown below.<br><br>```<br>change vector 101                                           Page   1 of   3<br>                         CALL VECTOR<br><br>    Number: 101                Name: PC3 Aquire-Out<br>                Attendant Vectoring? n    Meet-me Conf? n         Lock? n<br>     Basic? y   EAS? y   G3V4 Enhanced? n  ANI/II-Digits? n   ASAI Routing? y<br>  Prompting? y  LAI? n  G3V4 Adv Route? n   CINFO? n   BSR? n   Holidays? n<br>  Variables? n   3.0 Enhanced? n<br> 01 queue-to      skill 101    pri h<br> 02 wait-time     999 secs hearing silence<br> 03<br> 04<br>``` |
| 10. | Repeat Step 9 to modify Vector 102. |

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| 11. | Enter the **add vdn n** command, where "n" is an unused VDN number.  On Page 1 of the VECTOR DIRECTORY NUMBER form, assign a **Name** for the VDN and enter **Vector Number** "101" related to vector 101. |
|---|---|
| | ```
add vdn 17101                                          Page   1 of   2
                       VECTOR DIRECTORY NUMBER

                            Extension: 17101
                                 Name: PC3 Acquire-Out
                        Vector Number: 101
                    Attendant Vectoring? N
                   Meet-me Conferencing? N
                    Allow VDN Override? N
                                  COR: 1
                                   TN: 1
                             Measured: none


                            1st Skill:
                            2nd Skill:
                            3rd Skill:
``` |
| 12. | Create one additional Vector Directory Numbers for the Inbound VDN "17102" pointing to Skill 102 administered in Step 10 for Inbound calls. |
| 13. | Enter the **change announcement n** command, where **n** is an announcement number.  Configure four announcements for the messages that will be used by PC3 to play on the agent's telephone.  In the sample configuration, announcement numbers 3 through 6 were used with extensions 18100, 18101, 18102, and 18103.  The following four messages in the table below should be administered and recorded. |

| Announcement Extension | Message Type | Recorded Message |
|---|---|---|
| 18100 | Greeting | "Welcome to PC3 System" |
| 18102 | Inbound | "You are now in inbound mode" |
| 18103 | Outbound | "You are now in outbound mode" |
| 18104 | NotLogged In | "You are not logged in" |

Enter the **list announcements** command, to display the list of configured announcements.

```
                        ANNOUNCEMENTS/AUDIO SOURCES
Annc.      Announcement                                              Source
Number     Extension      Type         Name
Combinations
3           18100       integrated   Welcome_to_                       1
4           18101       integrated   You_are_in_Inbound                1
5           18102       integrated   You_are_in_Outbound               1
6           18103       integrated   You_are_not_logged_in             1
```

| 14. | Enter the **add station n** command, where **n** is a valid extension.  In this sample configuration, station extensions 10500 through 10502 were administered as phantom stations.  Phantom stations have the **Type** field set to "CTI". The phantom extensions are used during agent blending to put agents into the AUX-WORK mode when going from inbound to outbound mode. |
|---|---|

```
add station 10500                                           Page   1 of   4
                                STATION

Extension: 10500                              Lock Messages? n        BCC: 0
      Type: CTI                               Security Code:          TN: 1
      Port: X                             Coverage Path 1:           COR: 1
      Name: Phantom1 for PC3             Coverage Path 2:           COS: 1
                                          Hunt-to Station:
```

| 15. | Enter the **add agent-loginID n** command, where "n" is valid under the provisioned dial plan. Enter a descriptive name for the agent in the **Name** field. The default value for **Auto Answer** is set to "station", except for those logins that will be used for proactive outbound services. In this case, the parameter value must be set to "all". |
|---|---|

```
add agent-loginID 15101                                     Page   1 of   2
                          AGENT LOGINID

                    Login ID: 15101                          AAS? n
                        Name: agent 1                        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 Display? n
                                                         Password:
                                          Password (enter again):
                                              Auto Answer: all
                                         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
```

On Page 2 of the AGENT LOGINID form, specify the list of skills assigned to the login and the level for each in the **SN/SL** field as shown below.  Set the **SN** (Skill Number) field to "101" and "102".  Set the **SL** (Skill Level) field to "1"

```
change agent-loginID 15101                                  Page   2 of   2
                          AGENT LOGINID
      Direct Agent Skill:
Call Handling Preference: skill-level              Local Call Preference? n

   SN      SL        SN      SL         SN      SL        SN      SL
 1: 101    1      16:                31:                46:
 2: 102    1      17:                32:                47:
 3:                18:                33:                48:
 4:                19:                34:                49:
```

| 16. | Repeat step 15 for agent-loginID "15102" |
|---|---|

| 17. | Extension 10001 and 10002 were used as agent phones during the compliance testing. It is assumed that stations are already administered on Avaya Communication Manager. The following buttons were assigned to each phone as shown below. Enter the **change station n** where "n" is the agent phone extension. On page 3 of the STATION form, configure the following BUTTON ASSIGNMENTS. |
|---|---|

- **aux-work** – Agent is logged on to the phone but not available.
- **manual-in** – Agent goes available to accept ACD calls.
- **after-call** – Agent state after the ACD call is completed ends the call.
- **release** – To drop the call.

```
change station 10001                                        Page   3 of   4
                              STATION
 SITE DATA
      Room:                                    Headset? n
      Jack:                                    Speaker? n
     Cable:                                    Mounting: d
     Floor:                                 Cord Length: 0
  Building:                                   Set Color:
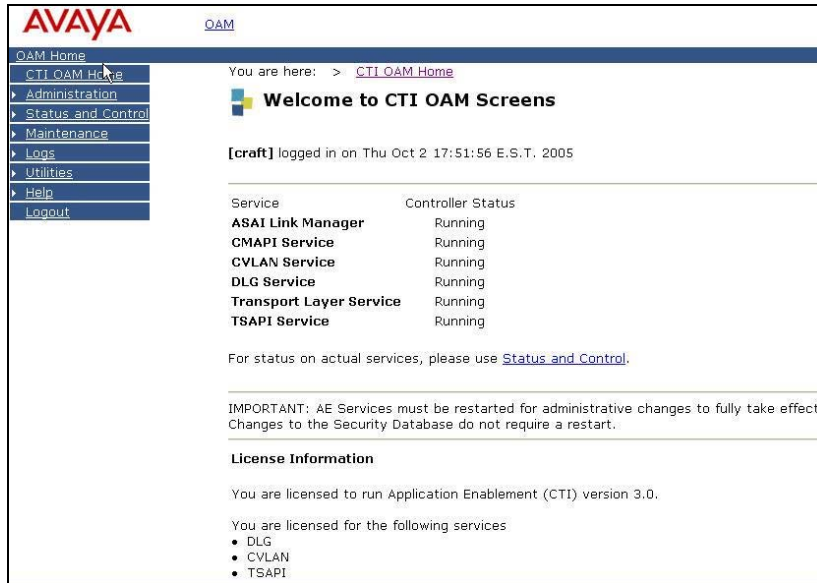
ABBREVIATED DIALING
    List1:                    List2:                    List3:

BUTTON ASSIGNMENTS
 1: call-appr                         5: aux-work    RC:    Grp:
 2: call-appr                         6: manual-in          Grp:
 3: call-appr                         7: after-call         Grp:
 4: call-fwd    Ext:                  8: release
```

# 5. Configure Avaya Application Enablement Services Server

This section provides the procedures for configuring Avaya Application Enablement Services. Basic configuration related to the switch connection between Avaya Communication Manager and Avaya Application Enablement Services is assumed to be established.

| Step | Description |
|------|-------------|
| 1. | Log into the Avaya Application Enablement Services (AES) Server OAM web interface to verify that the Avaya Application Enablement Services license has proper permissions for features illustrated in these Application Notes. Select **CTI OAM Admin** and verify that the TSAPI service is licensed as shown below. |
| | |

| | |
|---|---|
| 2. | From the CTI OAM menu, select **Administration → CTI Link Admin → TSAPI Links**. Click on **Add Link.** In the Add/ Edit TSAPI Links page shown below, configure the **Link**, **Switch Connection** and **Switch CTI Link Number**. Click on **Apply Changes**.<br><br>    • **Link:** Choose a link number between 1 and 16 that is available.<br>    • **Switch Connection:** Select the appropriate previously configured switch connection to be used, from the drop down list**.**<br>    • **Switch CTI Link Number:** Corresponding CTI link number configured in Section 4.1 Step 3.<br><br> |
| 3. | The Security Database (SDB) stores information about users and the devices they control. By default the SDB setting is enabled. For convenience during compliance testing, the TSAPI Security Database (SDB) was disabled. |
| 4. | Navigate to the Tlinks screen by selecting **Administration → Security Database → Tlinks**. Note the value of the **Tlink Name**, as this will be needed by the synTelate Agent in Section 6.4 Step 3 during log on and the Avaya PC3. The AES server automatically creates the Tlink Name shown below.<br><br> |

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| | |
|---|---|
| 5. | A User Id and password must be configured for the synTelate Agent application and Avaya PC3 to communicate as a TSAPI Client with the AES server. Click on **OAM Home → User Management** and log into the User Management pages. Click on **User Management → Add User**. In the **Add User** page shown below, enter a **User Id** and a password, new password and confirm password. These will be used by the synTelate agent in Section 6.4 Step 3. Enter descriptive names for the **Common Name** and **Surname** fields. Select "Yes" from the drop down box for the **CT User** field.<br><br> |

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# 6. Configure the synTelate Application

This section describes the process for installing and configuring the Avaya PC3 call list to synTelate database field mapping, synTelate CTI Configuration and synTelate Agent application.

## 6.1. Avaya PC3 Call list to synTelate Database field mapping.

Avaya PC3 has data for each call held in a call list. synTelate displays data from a database. The following steps describe the mapping of the Avaya PC3 call list to the synTelate database. The field mapping process describes the mapping of fields in the call list to corresponding fields in the synTelate database.

| Step | Description |
|------|-------------|
| 1. | Select **Start Menu → Programs → synTelate → synTelate Designer.** On the bottom left hand side panel, click on the **Designer** tab. Select Configuration in the Designer panel. <br><br> Click **Campaigns → Design**. Highlight the design version of the outbound campaign "Outbound 1" <br><br>  |

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| | |
|---|---|
| 2. | From the synTelate taskbar, select **Campaigns → Plug-ins → Avaya PC3 Configuration.**<br><br> |
| 3. | In the Avaya PDS Config Login dialog box that appears, enter a preconfigured PC3 agent **User Name** and appropriate **Password**. Click **OK**.<br><br> |

| | |
|---|---|
| 4. | Right Click in the **PDS Job Name** list box and click **Add.** <br><br>  |
| 5. | All the jobs retrieved from the Avaya PC3 are listed in the Add Job for campaign dialog box that appears. Select a relevant job for the outbound campaign. <br><br>  |

| | |
|---|---|
| 6. | Select the **Outbound** radio button. From the **Call list** drop down menu select "list5" and check the **Insert Record** box. The rest of the fields can be left with default values.<br><br>Click the ⬚ button to choose the Avaya PC3 fields that will be mapped with the synTelate database field names.<br><br> |
| 7. | Select the Avaya PC3 field from the **PDS Field** drop down list. In the **synTelate Field** click the ⬚ button, from the dialog box that appears select the corresponding synTelate field name to be mapped with the **PDS field** and click the green **tick** button. Select the appropriate Read / Write Options for the field and click the green **tick** button.<br><br> |
| 8. | Repeat steps 6 & 7 for each synTelate field name to be mapped with each relevant Avaya PC3 field. |

| | |
|---|---|
| 9. | The figure below shows the complete list of synTelate fields mapped to the relevant Avaya PC3 fields for the Outbound campaign job. Click the green tick button. |
| | |



| | |
|---|---|
| 10. | Repeat steps 1 to 9 for any other campaign requiring field mappings to the PC3 call lists. |
| 11. | Click the **Go Live** button. |

## 6.2. synTelate CTI Configuration

| Step | Description |
|------|-------------|
| 1. | Select **Start Menu → Programs → synTelate → synTelate Designer.** On the bottom left hand side panel click on **Supervisor** tab. Select **CTI Config** in the Supervisor panel. |
| 2. | Click the **Add** button in the CTI Configuration Setup box. |

| | |
|---|---|
| 3. | Enter a unique name for the CTI Configuration in the **Name** field. The name will be listed in the selection during the agent login in Section 6.4. Select "PC3" in the **Telephony Server** drop down list. Uncheck the **Auto Login** box. Enter External Prefix and Extension length if configured. The rest of the values can be left as default. Click **OK**. |

Edit CTI Config Details

Name                                                                      ID: 1
PC3

Telephony Server
Avaya PDS

☐ Auto Login          External Prefix          Extension Length
                                                              3

☑ Enabled for undefined Agents          Ring Delay

Pass Through Telephony Server

                                                    OK          Cancel

| | |
|---|---|
| 4. | Repeat step 2. The configuration setting below is for Predictive Agent Blending. Enter a unique name for the CTI Configuration in the **Name** field. The name will be listed in the selection during the agent login in Section 6.4. Select "PC3" in the **Telephony Server** drop down list. Uncheck the **Auto Login** box. Enter External Prefix and Extension length if configured. The rest of the values can be left as default. In **Pass Through Telephony Server** drop down list, select "TSAPI". Click **OK**. |

Edit CTI Config Details

Name                                                                      ID: 2
PC3 with PAB

Telephony Server
Avaya PDS

☐ Auto Login          External Prefix          Extension Length

☑ Enabled for undefined Agents          Ring Delay

Pass Through Telephony Server
TSAPI based switch

                                                    OK          Cancel

| | |
|---|---|
| 5. | Click **Close** once all changes have been made. |



## 6.3. synTelate Agent Installation and Configuration

The agent configuration is performed during the installation process.

| Step | Description |
|---|---|
| 1. | Insert the synTelate agent CD in the PC that will have the synTelate agent installed. Depending on the component required, in the Select Components screen, click the Install and Configure synTelate Agent or Designer components button. Click **Next**. |
| 2. | The **Choose Destination Location** screen prompts the user to specify the folder where the synTelate files will be installed.  By default, the destination folder is set to **C:\Program Files\synTelate**. Click on **Next** to accept the default. |

| | |
|---|---|
| 3. | The **Select Program Folder** screen prompts the user to specify the program folder in the Start Menu to be selected or created where the synTelate application will appear. Click on **Next** to accept the default. |
| 4. | Avaya PC3 users do not need to use synTelate Server. Hence, the field for the synTelate server is left blank and **Next** is clicked.<br><br> |
| 5. | The Database Selection screen prompts the user to specify the database type that synTelate will use. For the compliance testing, Microsoft SQL Server 7/2000 was used. Click **Next**.<br><br> |

| | |
|---|---|
| 6. | The **synTelate Database** screen requires database login details to be entered to allow synTelate to access the database. The following values were used for the compliance testing:<br>    • Database username = **synTelate**<br>    • Database password = Enter appropriate password.<br><br>Click **Next**.<br><br> |

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| 7. | The next screen asks for the location of the synTelate database to be defined. Enter the computer name or the IP Address of the computer where the synTelate runtime and configuration databases are stored. Click **Next**.<br><br>**Note:** The screen displayed depends on the database type selected in the Database Selection screen.<br><br> |
| 8. | In the next screen, enter the name of the configuration database. Click **Next**.<br><br> |

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| 9. | The next screen prompts for synTelate Addressing Software Integration details. Accept the default value - **No, do not configure Addressing Integration**. Click **Next**.<br><br>**InstallShield Wizard**<br><br>**synTelate Addressing Software Integration**<br>Configure synTelate addressing software integration.<br><br>Do you wish to configure synTelate Addressing Software Integration? (Details of supported Addressing Software can be found in the Installation Guide). Click Next to continue.<br><br>⦿ No, do not configure Addressing Integration.<br><br>○ Yes, configure Addressing Integration.<br><br>InstallShield<br><br>〈 Back    Next 〉    Cancel |
| 10. | The Automatic Callbacks screen gives the option to enable or disable Automatic Callbacks. Accept the default - **No, disable automatic callbacks**. Click **Next**.<br><br>**InstallShield Wizard**<br><br>**Automatic Callbacks**<br>Enable or disable automatic callbacks.<br><br>Do you wish to enable synTelate automatic callbacks?<br><br>⦿ No, disable automatic callbacks.<br><br>○ Yes, enable automatic callbacks.<br><br>InstallShield<br><br>〈 Back    Next 〉    Cancel |

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| 11. | On the next screen, the option is given to install the synTelate international language support. Accept the default and click **Next**. |
| 12. | The Review screen allows the information that has been entered to be checked. If any of the settings are incorrect, then use the Back button to go back to previous screens and change the information. Once the details are confirmed as correct in the review screen, click **Next** to start installing the files. |

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| 13. | A **Setup Status** screen will appear that provides a guide to the progress of the installation. Once the files have been copied, the setup program will configure the system.  An information message will appear indicating that this is being performed on the machine. It is recommended that the machine be restarted after each installation. Click on **Yes**, then the **Finish** button to restart the machine immediately. |

## 6.4. synTelate Agent Application

| Step | Description |
|------|-------------|
| 1. | On the synTelate Agent PC, click on **Start Menu** → **Programs** → **synTelate** → **synTelate Agent.** Choose type of job. Click **OK**. |
| 2. | If Intelligent Call Blending (PC3) is chosen, the dialog box appears below. Enter the Avaya PC3 agent **User Name** and appropriate **Password**. Click **OK**. |
| 3. | When logging in using Proactive Agent Blend mode, an additional login dialog for AES will appear as shown below. Select the Tlink shown in Section 5, Step 4. Enter **Username** and **Password** configured in Section 5, Step 5 and enter **Extension** of agent phone and Agent Login id configured in Section 4.2, Step 11 in the **Agent Name** field. Click **OK**. |

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| 4. | Click the ready button on the toolbar and select ready from the drop down menu that appears. |
| 5. | Select job type and job name from the Campaign List dialog. |
| 6. | The following screen displays an example of a customer record for a campaign. Refer to Section 11 for synTelate documentation on configuring campaigns. |

# 7. Interoperability Compliance Testing

The testing examined the synTelate Agent application interoperability with Avaya Proactive Contact 3.0.1 using the Avaya Agent API. The majority of the testing focused on the ability of the synTelate Agent application to handle both inbound and outbound calls. Both Inbound and Outbound call scripts were tested. Proactive Agent Blending made outbound calls and released agents to inbound only when inbound calls were made to the Inbound VDN numbers configured. Performance load testing was not performed.

## 7.1. General Test Approach

All feature functionality test cases were performed manually to verify proper operation.  The general test approach was to test the features on the synTelate agent that are supported with Avaya Proactive Contact 3.0.1.

- The following feature buttons on the DRC were tested.
    - Login
    - Logout
    - Go Ready
    - Go Not Ready
    - Terminate Call
    - Release Call
    - Call Back
    - Agent Owned Recall
    - Play Message

- The following events from Avaya PC3 to the synTelate agent were tested.
    - AutoRelease Line
    - JobEnd
    - JobTransLink
    - JobTransRequest
    - Receive Message

- The following agent types were tested.
    - Outbound agent
    - Managed agent
    - Predictive Blended agent

- Inbound calls were tested using the Predictive Agent Blending feature of Avaya Proactive Contact 3.0.1.  This is the only type of inbound feature on Avaya PC3 that was tested.

## 7.2. Test Results

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

# 8. Verification Steps

This section provides the tests that can be performed to verify proper configuration of Avaya Communication Manager, Avaya Application Enablement Services, and synTelate Agent PC.

## 8.1. Verify Avaya Communication Manager and Avaya Enablement Services

The following steps can ensure that the communication between Avaya Communication Manager and the Avaya Application Enablement Services server is working.

| Step | Description |
|------|-------------|
| 1. | Verify that the service state of the TSAPI link is established. <br><br> ```<br>status aesvcs cti-link<br><br>                     AE SERVICES CTI LINK STATUS<br><br>CTI     Version   Mnt    AE Services       Service       Msgs     Msgs<br>Link              Busy   Server            State         Sent     Rcvd<br><br>1       4         no     AEServer          established   15       15<br>3       4         no     AEServer          established   15       15<br>``` |
| 2. | On Avaya PC3, use the "**netstat –a**" command to verify the connection between Avaya PC3 and the eCreator PDS Agent. The results of the "**netstat –a**" should show an **ESTABLISHED** agent connection. <br><br>  |

## 8.2. Verify synTelate Agent

| Step | Description |
|------|-------------|
| 1. | On the synTelate Agent PC, click on **Start Menu → Programs → synTelate → synTelate Agent.** Choose type of job. Click **OK**. |
| 2. | If PC3 is chosen, the dialog box appears below. Enter the Avaya PC3 agent **User Name** and appropriate **Password**. Click **OK**. |
| 3. | When logging in using Proactive Agent Blend mode (PC3 with PAB), an additional login dialog box for AES will appear as shown below. Select the Tlink shown in Section 5, Step 4. Enter **Username** and **Password** configured in Section 5, Step 5 and enter **Extension** of agent phone and Agent Login id configured in Section 4.2, Step 11 in the **Agent Name** field. Click **OK**. |

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| 4. | Click the ready button on the toolbar and select ready from the drop down menu that appears. |
| 5. | Select job type and job name from the Campaign List dialog. |
| 6. | The following screen displays an example of a customer record for a campaign. Refer to Section 11 for synTelate documentation on configuring campaigns. |

# 9. 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

# 10. Conclusion

These Application Notes describe the required configuration steps for the synTelate Agent 3.0 application to successfully interoperate with Avaya Proactive Contact 3.0.1.  All test cases were completed successfully and the configuration described in these Application Notes has been successfully compliance tested.

# 11. Additional References

This section references the Avaya and Initiative Software product documentation that are relevant to these Application Notes.

Avaya product documentation can be found at http://support.avaya.com.
- Administrator's Guide for Avaya Communication Manager, Release 3.0.1, Issue 1, June 2005; Doc ID: 03-300509
- Avaya Proactive Contact 3.0 Administration (UNIX-based), October 2005; Doc ID: 07-300488
- Sample Avaya Proactive Contact 3.0 (PC3) with CTI Installation and Configuration, Issue 1.0, Avaya Solution and Interoperability Test Lab

Company and product information available from Initiative Software.

- Company website:- www.inisoft.co.uk
- Product website:- www.syntelate.com