



Avaya Solution & Interoperability Test Lab

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

Abstract

These Application Notes describe the configuration steps required for Initiative Software synTelate 2.4 to successfully interoperate with Avaya IP Office 3.1.

synTelate is a call center scripting application for creating inbound and outbound campaigns. synTelate consists of the synTelate Designer and the synTelate Agent. synTelate Designer is a graphical tool that is used for the definition of the call flow and agent screens. In the configuration described in these Application Notes, synTelate used Microsoft TAPI 2.1 to communicate with Avaya IP Office 3.1. During compliance testing, the synTelate application was verified to be interoperating with Avaya IP Office 3.1.

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.

1. Introduction

These Application Notes describe a compliance-tested configuration comprised of Avaya IP Office 3.1 and synTelate 2.4.

synTelate is a call centre scripting application for creating inbound and outbound campaigns. synTelate consists of the synTelate Designer and the synTelate Agent. synTelate consists of the screen definition and call flow design tool, and synTelate Designer. The Agent desktop is available in two versions - synTelate Agent and synTelate WebAgent. The compliance testing was carried out with the synTelate Agent only.

synTelate call center scripting software provides call-center managers, the ability to create visual and easy to follow scripts and associated data screens. synTelate agents can be assigned to multiple scripts, maximizing call center productivity. The synTelate Database consists of client records that are used during inbound and outbound campaigns. During the compliance testing the synTelate Designer co resided on the same PC as the Avaya IP Office Manager.

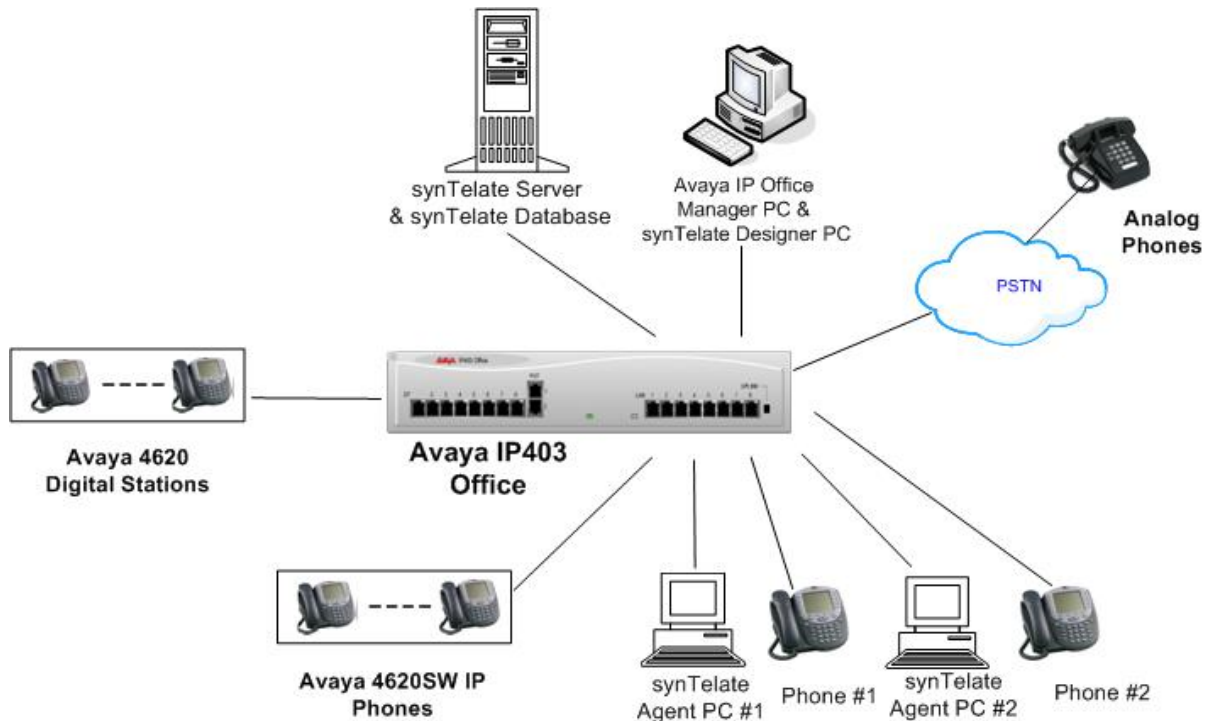


Figure 1: Avaya IP Office and synTelate Compliance Test Configuration

2. Equipment and Software Validated

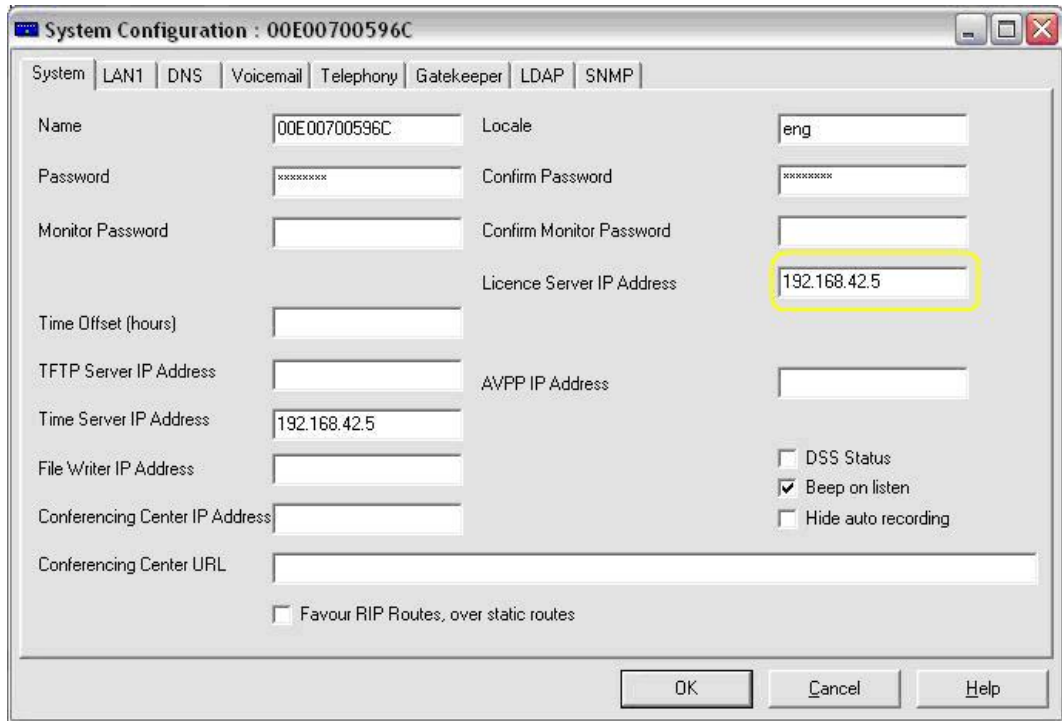
The following equipment and software were used for the sample configuration provided.

Equipment	Software
Avaya IP 403 Office System	3.1(45)
Avaya IP Office Manager software	5.1(45)
Avaya 4620 IP Telephones	2.3
Avaya 4620 Digital Telephones	-
synTelate Server	2.4 sp3
synTelate Database	MSSQL2000
synTelate Agent PCs	2.4 SP3
synTelate Designer PC	2.4 SP3
Operating System for synTelate Agent and Designer	Windows XP
Avaya IP Office TAPI	1.0.0.26

3. Configure Avaya IP Office

These Application Notes address provisioning of Avaya IP Office as it relates to integration of synTelate application. For all other provisioning information, such as provisioning of the trunks for outbound dialing, call coverage, extensions, etc. refer to Avaya IP Office documentation in Section 9.

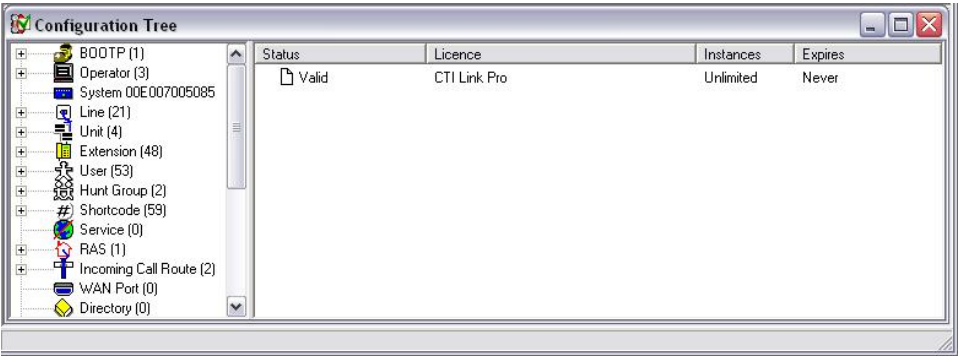
Step	Description
IP Office License Key Physical Installation	
1.	Plug in the red Avaya IP400 feature key into USB port of the IP Office Manager PC.
Configure License Key Server IP Address	
2.	On the IP Office Manager PC click on Start → Programs → IP Office → Manager to launch the Manager application. Log in to the Manager application using the appropriate credentials.
3.	In the Manager window, select File → Open to search for the IP Office system in the network. Log in to the IP Office system using the appropriate login credentials to receive its configuration.
4.	In the Manager window, go to the Configuration Tree and double-click System. In the System Configuration window, select the System tab and set License Server IP Address to the IP address of the machine to which the red Avaya IP400 feature key is connected. This is typically the IP Office Manager PC. Click OK . The rest of the fields within the System tab can be left with default values.



Step	Description
Install Licenses	

5. In the Manager window, go to the Configuration Tree and double-click **License** to open the list of licenses installed in the IP Office system. Right click in the license list window and select **New**. In the License window, enter the **CTI Link Pro License Key** and click **OK**.

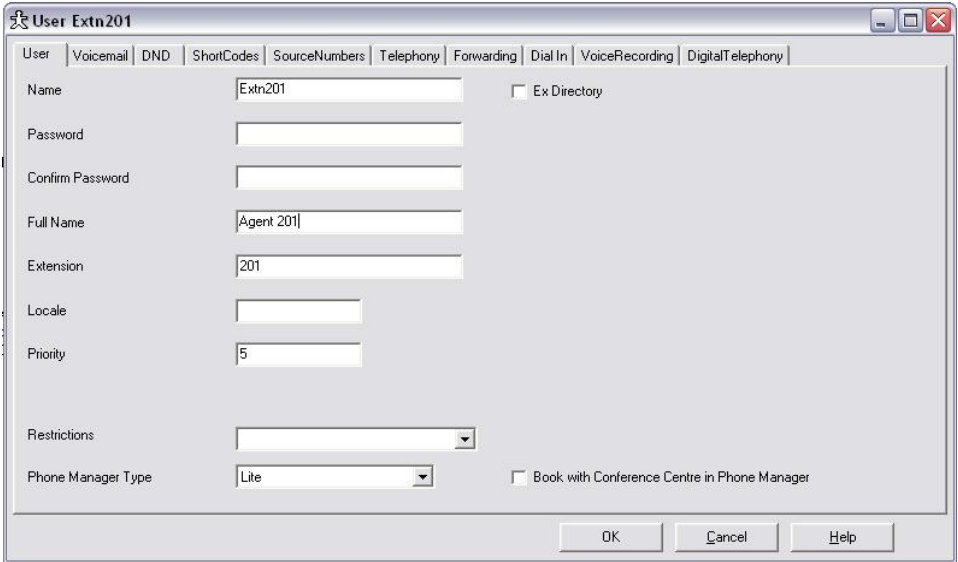
6. In the Manager window, select **File** → **Save** to save the licenses to the IP Office system and wait for the system to update. Before the system reloads, the new licenses will be listed with an Unknown status. After the system reloads, the new licenses will list as Valid as shown below.



Configure synTelate Agent TAPI Extensions	
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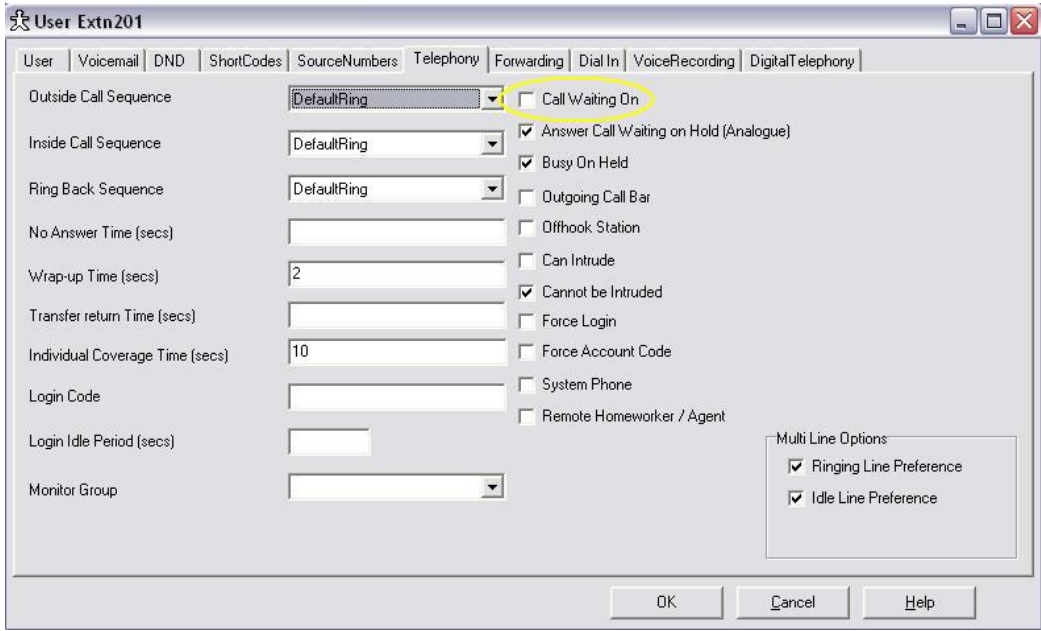
7. In the Manager window, go to the Configuration Tree and double-click **User** to open the list of users on the IP Office system.

8. Right click in the User list window and select **New**. In the User window that appears, set **Name** to “ExtnX” where **X** is the number of the agent extension desired, (e.g., 1, 2) and **Extension** to the agent extension number to be used. The remaining fields are default.

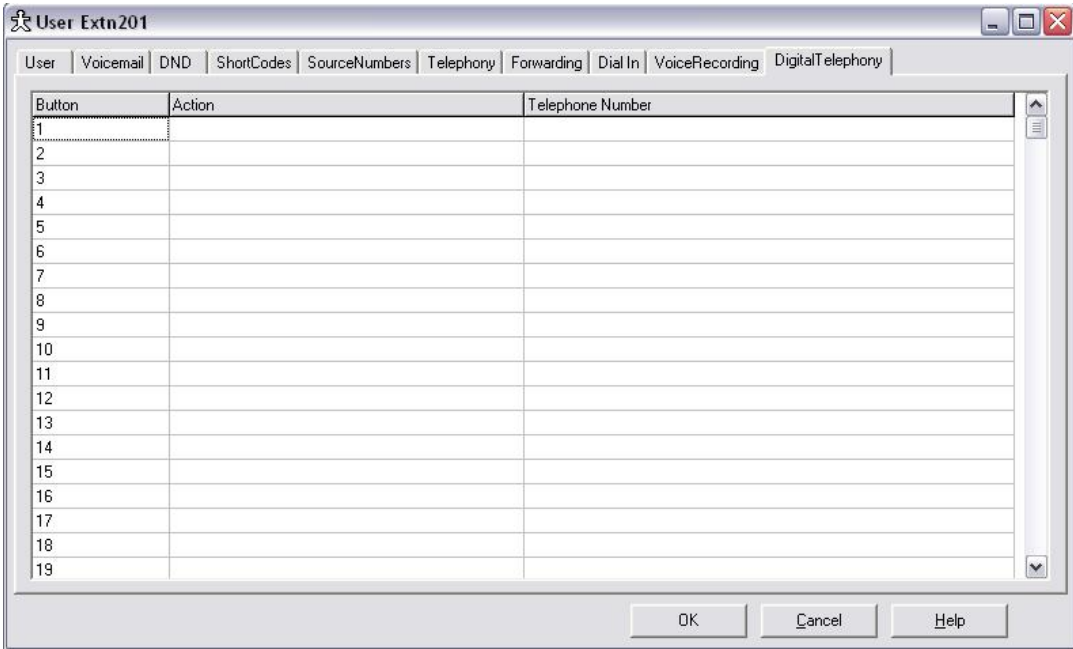


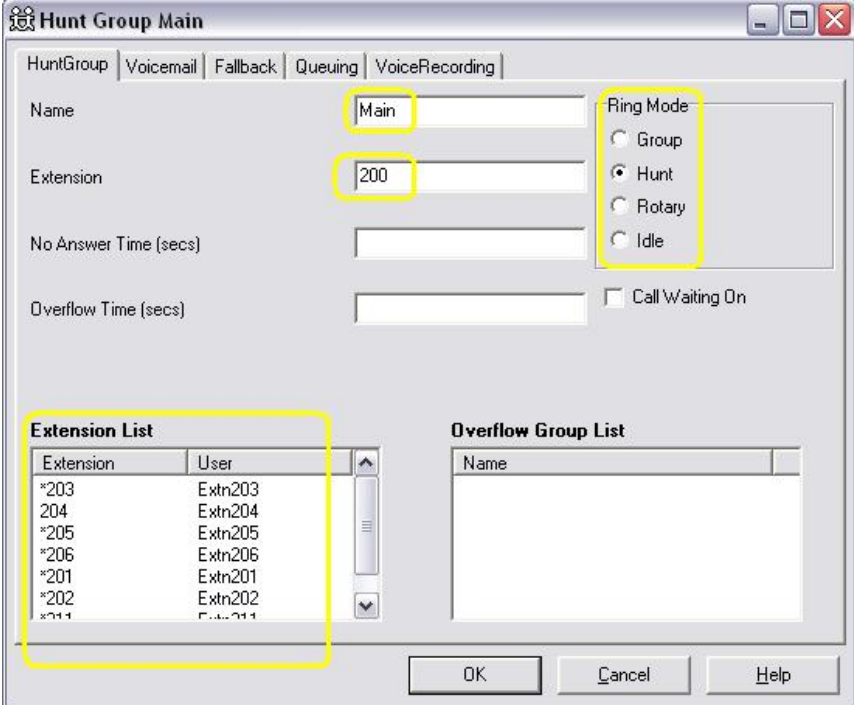
Step | **Description**

9. In the **Telephony** tab of the User window, uncheck **Call Waiting On** and click **OK**.



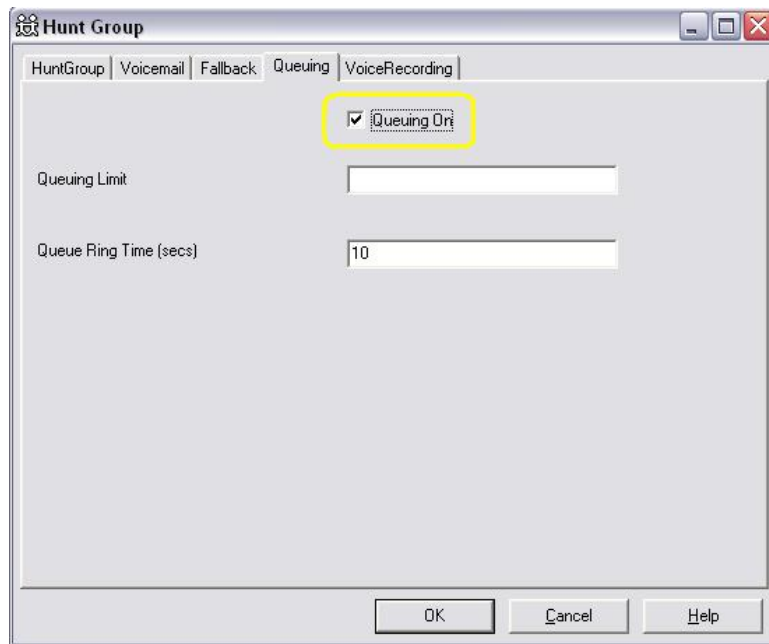
10. In the **Digital Telephony** tab of the User window, make sure no call appearance buttons are configured and click **OK**. Follow the Avaya IP Office documentation to remove these.



Step	Description
11.	Repeat Steps 7 - 10 for each synTelate agent TAPI extension needed. For the purposes of these Application Notes, five TAPI extensions were created (extensions 201 – 205). The number of CTI link Pro licenses purchased limits the number of TAPI extensions that can be created.
Configure Main Hunt Group	
12.	<p>In the Manager window, go to the Configuration Tree and double-click Hunt Group to open the list of hunt groups on Avaya IP Office. Select the default Hunt Group Main. In the Hunt Group window, add the extensions created in Step 8 to the Extension List by right clicking in the Extension List section and selecting Add. Then, set the extension numbers desired for the hunt group, Ring Mode to Hunt, and Call Waiting On to unchecked.</p> 

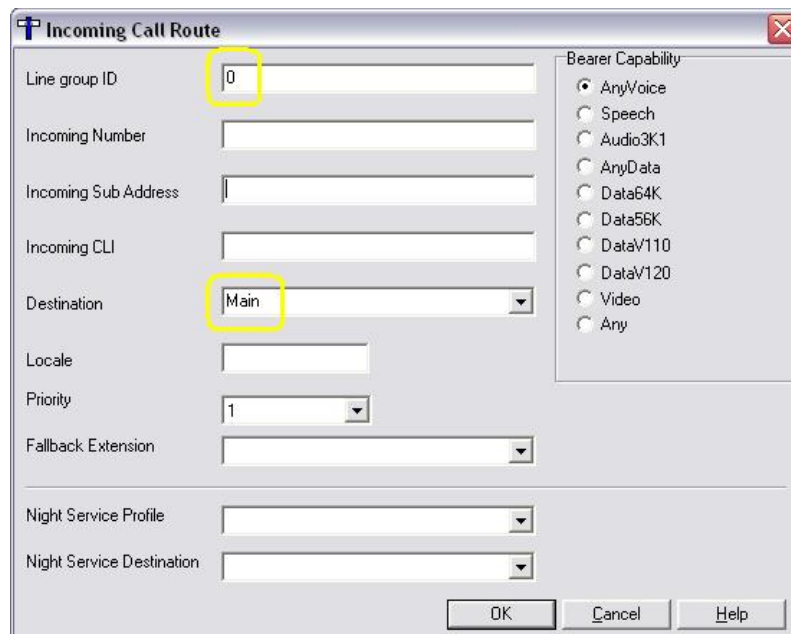
Step	Description
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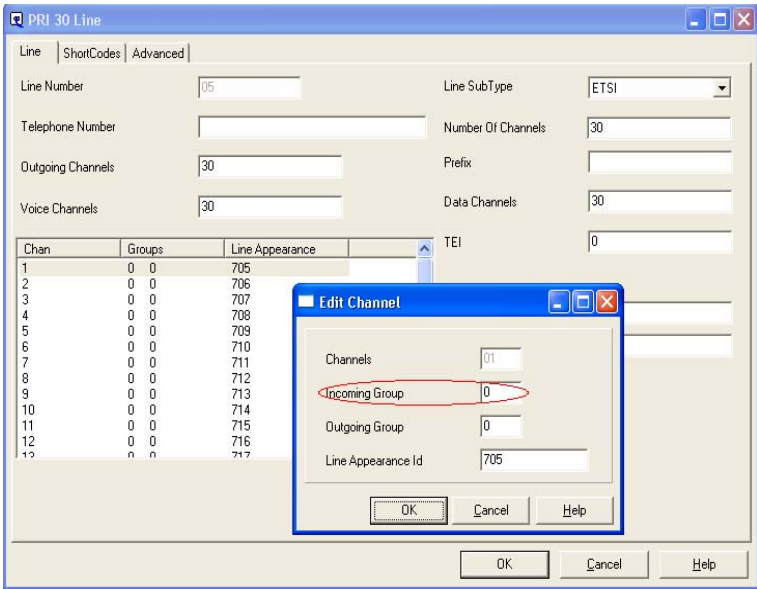
13.	In the Queuing tab of the Hunt Group window, check Queuing On and click OK .
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Select Inbound Call Route	
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14.	In the Manager window, go to the Configuration Tree and double-click Incoming Call Route to open the list of incoming call routes on Avaya IP Office. Right click in the incoming call route window and select New or select the default Main that is already configured. Make a note of the Line group ID and click OK .
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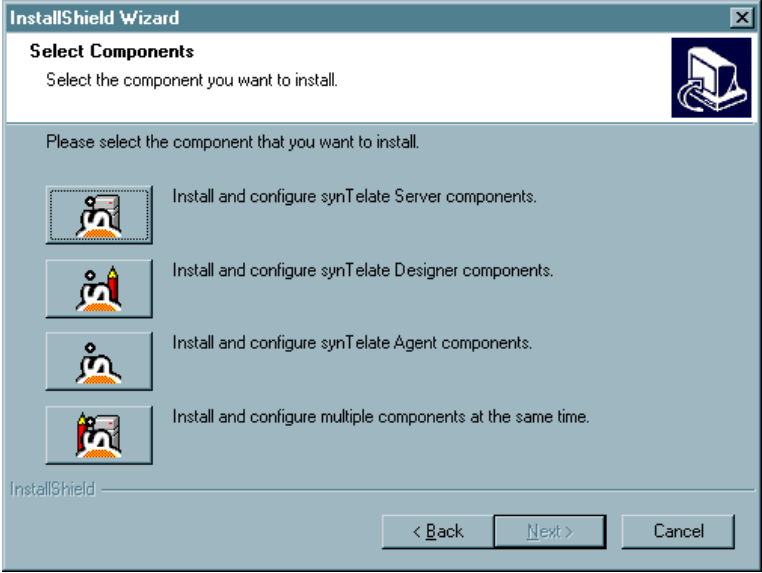


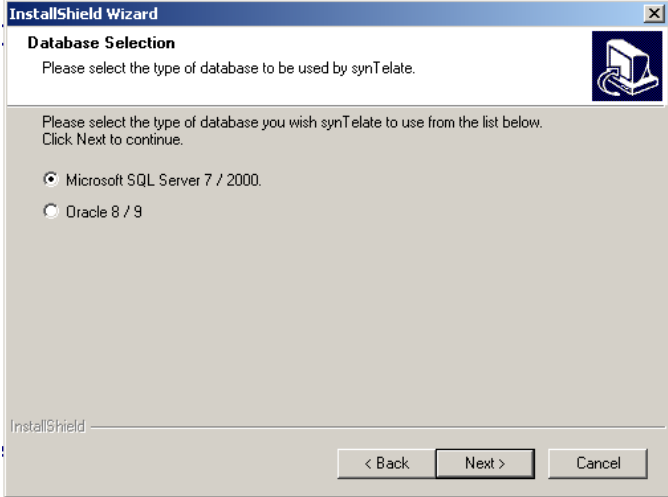
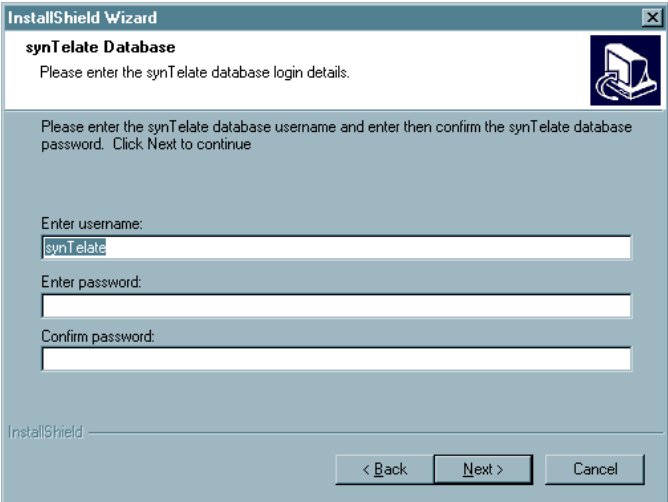
Step	Description
Assign Trunks to the Incoming Call Route	
15.	<p>In the Manager window, go to the Configuration Tree and double-click Line to open the list of lines (trunks) available on Avaya IP Office. Double-click the PRI 30 Line whose incoming calls are to be routed to the Hunt Group Main (200), created earlier in Step 12. In the Line window that appears, double-click on every channel and edit the Incoming Group field in the Edit Channel pop up that appears. Enter the Incoming Group value to match the Line group ID created in Step 14. Click OK.</p> 
16.	<p>In the Manager window, select File → Save to write the configuration to Avaya IP Office and wait for the unit to reboot.</p>

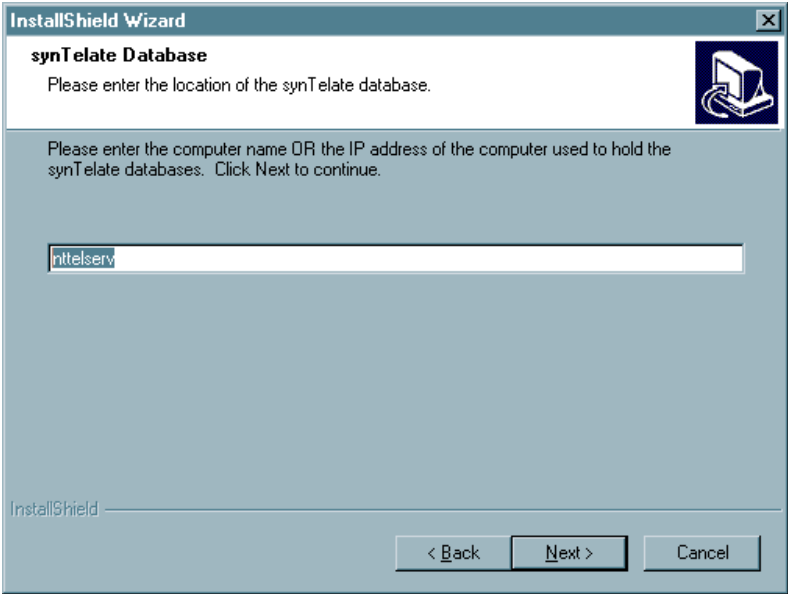
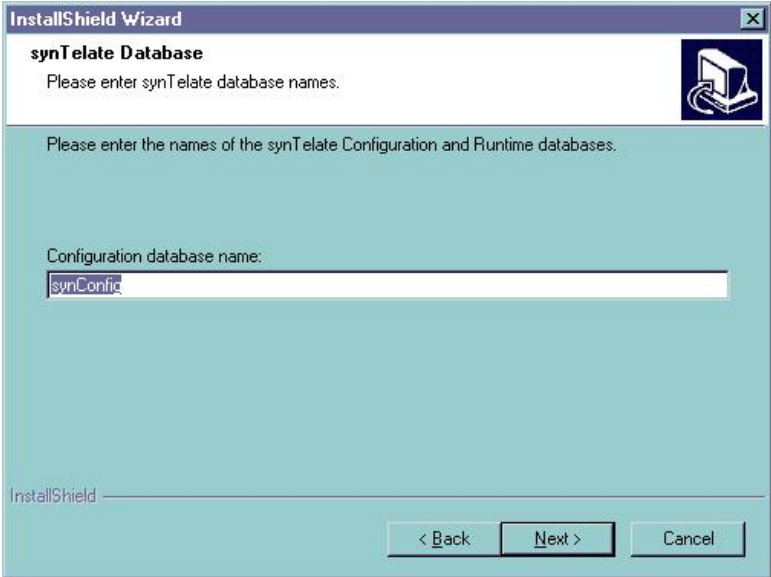
4. Configure the synTelate Application

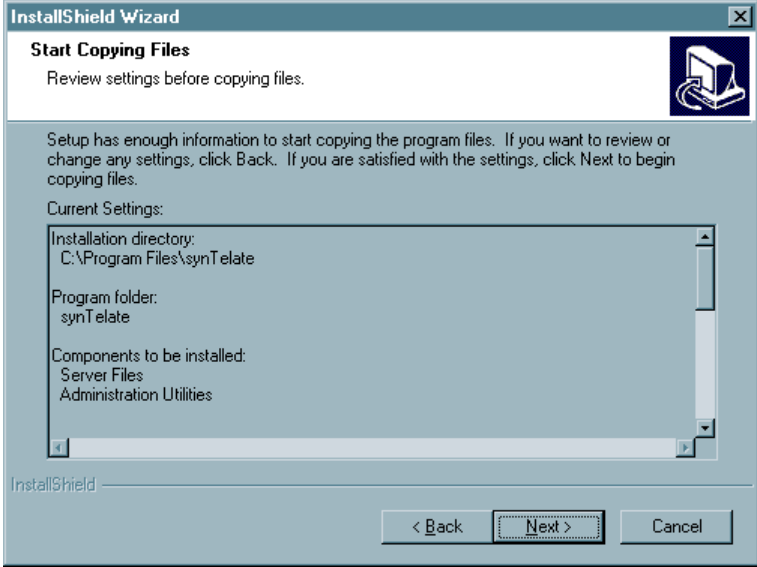
This section describes the process for installing and configuring the synTelate Server, synTelate Agent application and the synTelate Designer.

4.1. synTelate Server Configuration

Step	Description
1.	<p>In the test configuration, Microsoft SQL Server 7 was used with the synTelate Server. In addition, following values will be used for the synTelate Server installation needed for the database connection.</p> <ul style="list-style-type: none">• PC name that will contain the synTelate database tables = nttelserv• Database username = synTelate• Database password = blank• Name of the configuration database = synConfig
2.	<p>Insert the synTelate CD into the PC that will host the synTelate Server application and click on the synTelate setup executable. Click when prompted Yes for the installation to begin.</p>
3.	<p>In the Select Component screen that is displayed click the Install and configure synTelate Server components button. Click Next.</p> 
4.	<p>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.</p>

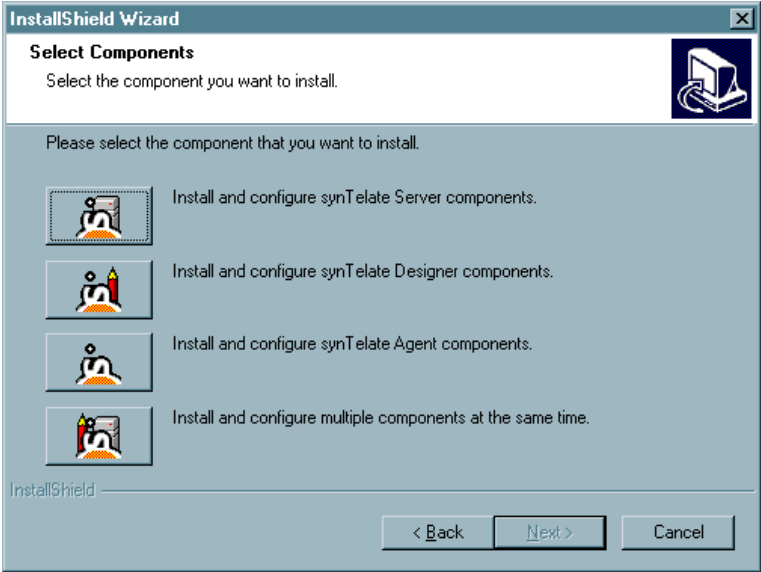
Step	Description
5.	<p>The Select Program Folder screen prompts the user to specify the program folder in the Start Menu to be selected or created where the synTelate application will appear. Click on Next to accept the default.</p>
6.	<p>The Database Selection screen prompts the user to specify the database type that synTelate will use. For the compliance testing, Microsoft SQL Server 7 was used. Click Next.</p> 
7.	<p>The synTelate Database screen requires database login details to be entered to allow synTelate to access the database. As specified in Step 1, following values were used for the compliance testing:</p> <ul style="list-style-type: none"> • Database username = synTelate • Database password = blank <p>Click Next.</p> 

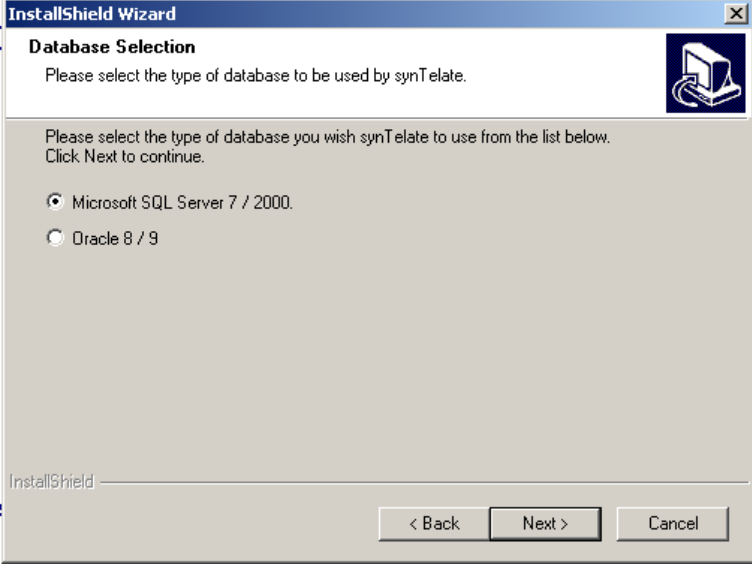
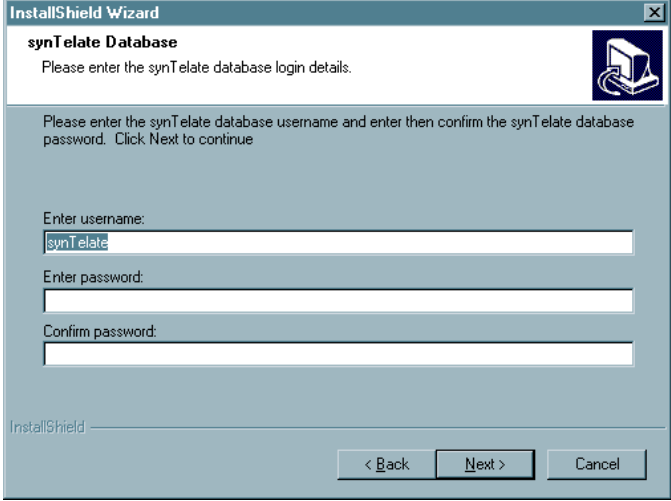
Step	Description
8.	<p>The next screen asks for the location of the synTelate database to be defined. Enter the computer name or the IP Address of the computer where the synTelate runtime and configuration databases are stored then click Next.</p> <p>Note: The screen displayed depends on the database type selected in the Database Selection screen.</p> 
9.	<p>On the next screen, enter the name of the configuration database and then click Next.</p> 

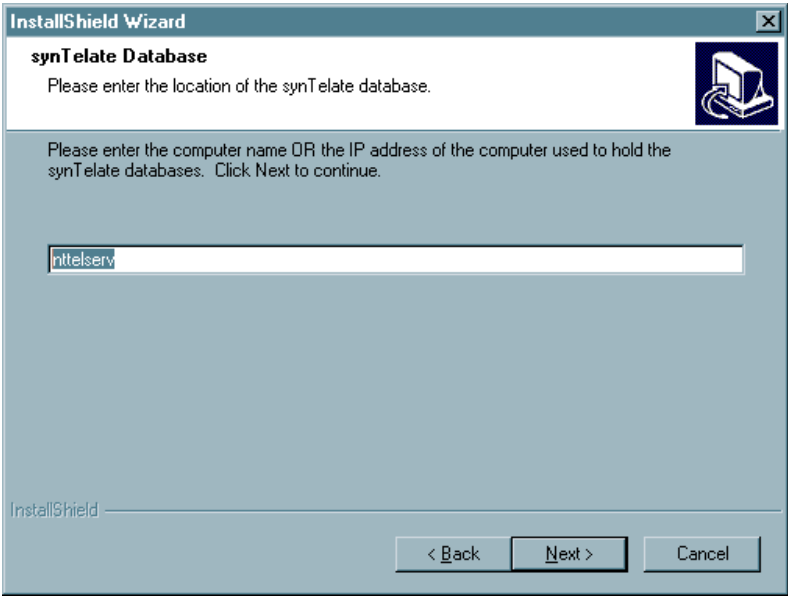
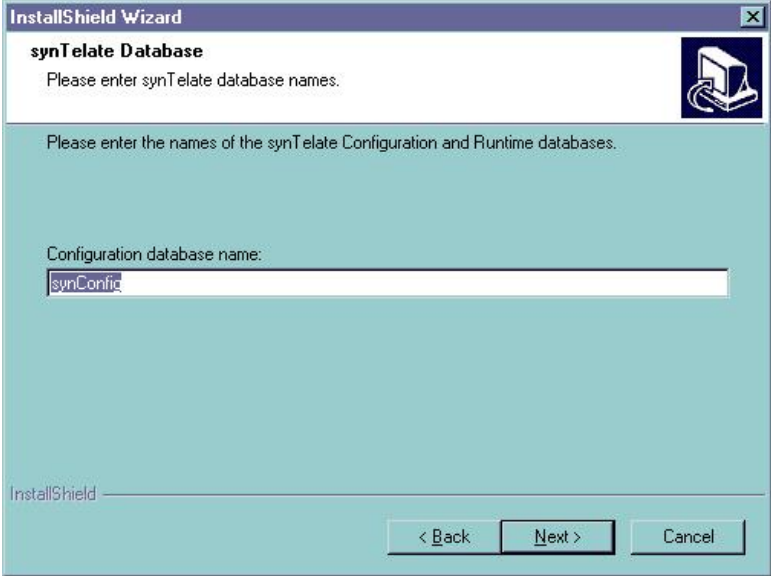
Step	Description
	Final Review Screen
10.	<p>The Review screen allows the information that has been entered to be checked. If any of the settings are incorrect then use the Back button to go back to previous screens and change the information. Once the details are confirmed as correct in the review screen, click Next to start installing the files.</p> 
11.	<p>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.</p>
12.	<p>Once synTelate Server has been installed and the empty database created, the Create Tables utility can be run to create the tables that are required for synTelate 2.4 to function. The Create Tables application can be found in the Start Menu under Programs, synTelate, synTelate Utilities, Create Tables.</p> <p>Refer to the documentation in Section 9 for instructions how to create tables in the SQL database.</p>

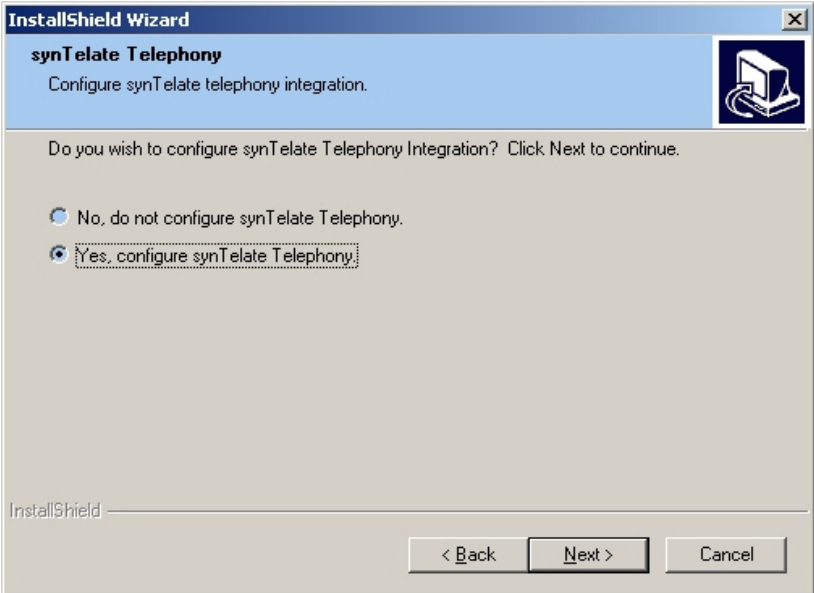
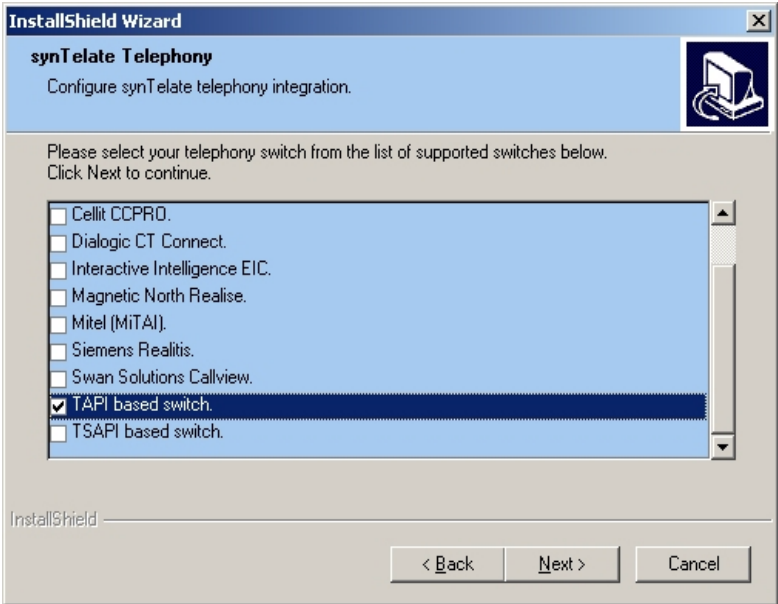
4.2. synTelate Designer/Agent Configuration

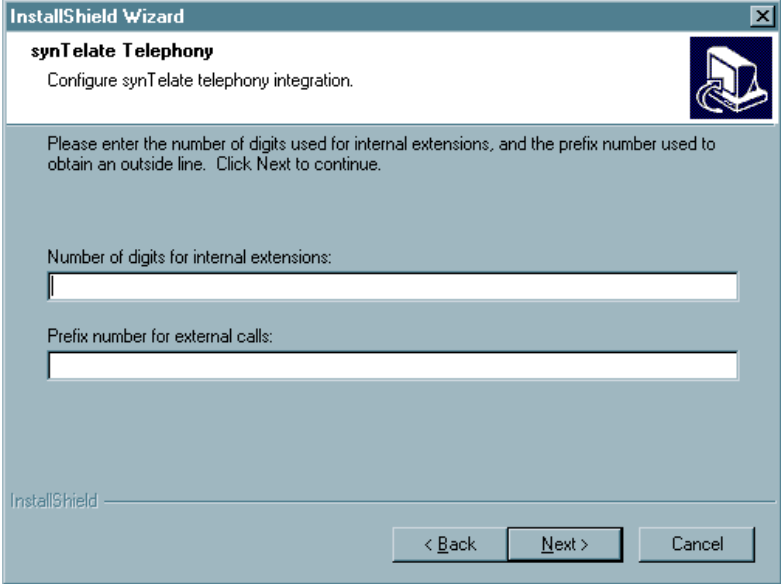
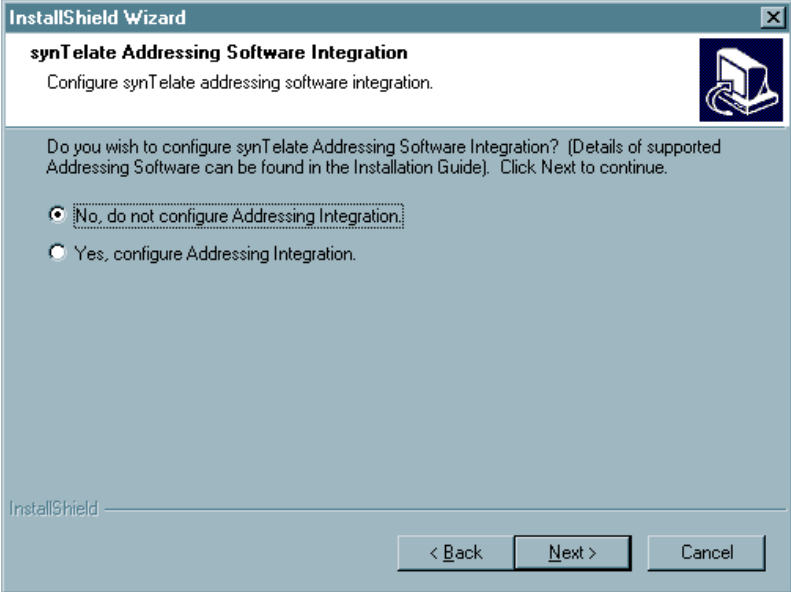
The same configuration steps are taken when installing synTelate Designer or Agent only a few additional components related to synTelate Designer are installed. The synTelate Server must be running before the synTelate Designer or Agent installation can take place.

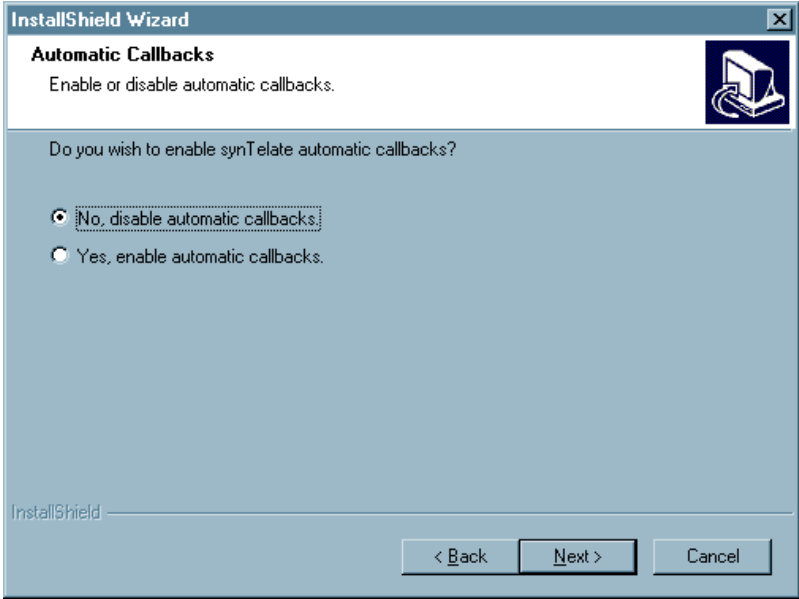
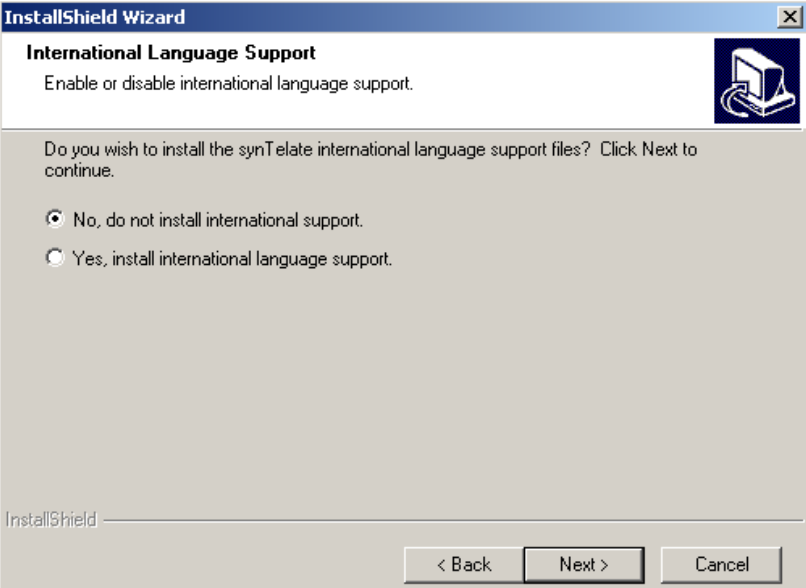
Step	Description
1.	<p>Depending on the component required, in the Select Component screen click the Install and Configure synTelate Agent or Designer components button. Click Next.</p> 
2.	<p>The Choose Destination Location screen prompts the user to specify the folder where the synTelate files will be installed. By default, the destination folder is set to C:\Program Files\synTelate. Click on Next to accept the default.</p>
3.	<p>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.</p>

Step	Description
4.	<p>The Database Selection screen prompts the user to specify the database type that synTelate will use. For the compliance testing, Microsoft SQL Server 7 used. Click Next.</p> 
5.	<p>The synTelate Database screen requires database login details to be entered to allow synTelate to access the database. Following values were used for the compliance testing:</p> <ul style="list-style-type: none"> • Database username = synTelate • Database password = blank <p>Click Next.</p> 

Step	Description
6.	<p>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 then click Next.</p> <p>Note: The screen displayed depends on the database type selected in the Database Selection screen.</p> 
7.	<p>In the next screen enter the name of the configuration database.</p> 

Step	Description
8.	<p>The synTelate Telephony screen provides the choice for Telephony Integration to be configured. Select Yes, configure synTelate Telephony. Click Next.</p> 
9.	<p>Select the TAPI based switch option for Avaya IP Office. Click Next.</p> 

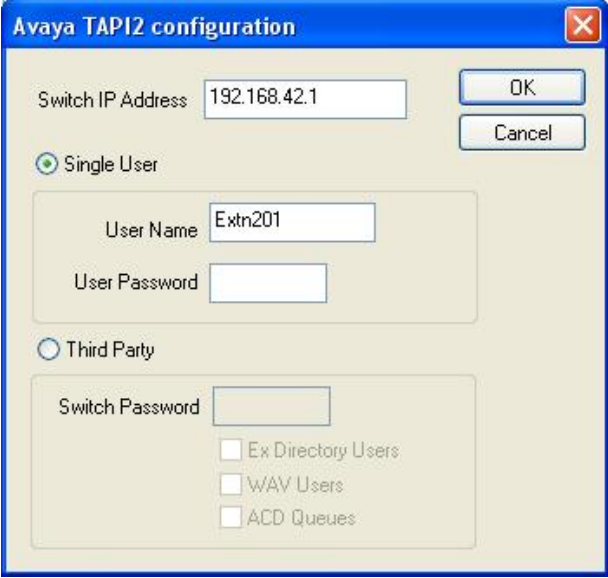
Step	Description
10.	<p>In the following screen, enter the number of digits for internal extensions and the prefix for external calls. For compliance testing no values were entered.</p>  <p>The screenshot shows a dialog box titled "InstallShield Wizard" with the subtitle "synTelate Telephony". The main text reads: "Configure synTelate telephony integration." Below this, it says: "Please enter the number of digits used for internal extensions, and the prefix number used to obtain an outside line. Click Next to continue." There are two text input fields: "Number of digits for internal extensions:" and "Prefix number for external calls:". At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".</p>
11.	<p>The next screen prompts for synTelate Addressing Software Integration details. Accept the default value - No, do not configure Addressing Integration.</p>  <p>The screenshot shows a dialog box titled "InstallShield Wizard" with the subtitle "synTelate Addressing Software Integration". The main text reads: "Configure synTelate addressing software integration." Below this, it asks: "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." There are two radio button options: "No, do not configure Addressing Integration." (which is selected) and "Yes, configure Addressing Integration." At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".</p>

Step	Description
12.	<p>The Automatic Callbacks screen, gives you the option to enable or disable Automatic Callbacks. Accept the default - No, disable automatic callbacks.</p> 
13.	<p>The next screen the option is given to install the synTelate international language support. Accept the default - No, do not install international support.</p> 

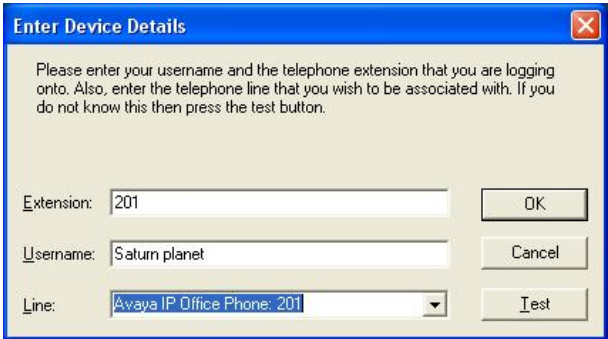
Step	Description
14.	<p>The Review screen allows the information that has been entered to be checked. If any of the settings are incorrect then use the Back button to go back to previous screens and change the information. Once the details are confirmed as correct in the review screen, click Next to start installing the files.</p> <div data-bbox="483 449 1237 1012" data-label="Image"> </div>
15.	<p>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.</p>
16.	<p>Once synTelate Designer has been installed a simple inbound and outbound campaign can be created for synTelate 2.4 to function.</p> <p>The synTelate Designer application can be found in the Start Menu → Programs → synTelate → synTelate Designer. On the bottom left hand side panel click on Designer tab. Select Configuration in the Designer panel.</p> <p>Refer to the documentation in Section 9 for instructions how to create inbound and outbound campaigns.</p>

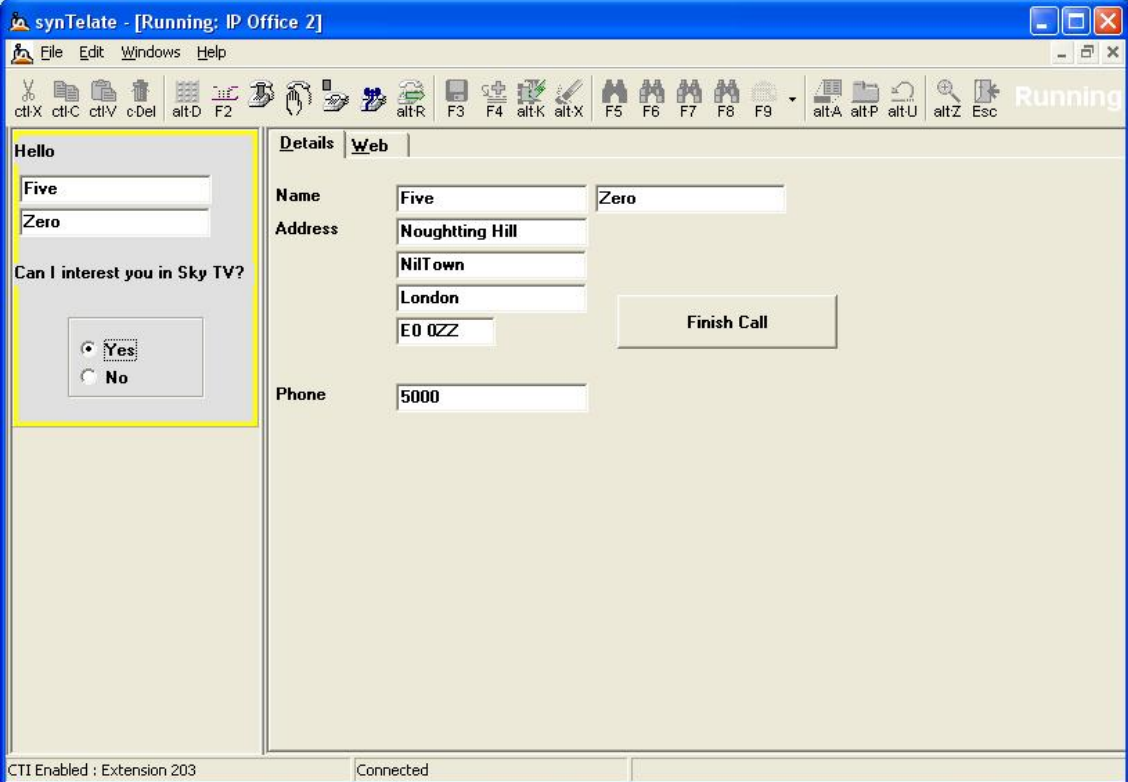
4.3. Installing and Configuring Avaya IP Office TAPI2 Service Provider

Step	Description
1.	Using the Avaya IP Office User Applications CD, install the Avaya IP Office TAPI Service Provider driver on the synTelate client machine.
2.	After the system reboots, log in to the system again as administrator and go to Start → Settings → Control Panel . In the Control Panel window that appears, double-click Phone and Modem Options.
3.	In the Advanced tab of the Phone and Modem Options window, double-click Avaya IP Office TAPI2 Service Provider.

Step	Description
4.	<p>In the Avaya TAPI2 configuration window, set Switch IP Address to the IP Address of Avaya IP Office, select Single User, set User Name and User Password to the user name and password set on the switch in Section 3, Step 8.</p> 
5.	Reboot the synTelate client machine

4.4. synTelate Agent Application

Step	Description
1.	<p>On the synTelate agent PC1, Click on Start Menu → Programs → synTelate → synTelate Agent. Enter the agent extension.</p> 

Step	Description
2.	<p>For an Inbound campaign it is possible to configure a campaign to pop on answer or pop on ring. The following screen displays an example of a customer record for an inbound campaign. Refer to section 9 for synTelate documentation on configuring campaigns.</p> 
3.	<p>For an Outbound campaign you would need to click on the outbound campaign configured on the left hand side panel under the campaigns tab.</p>

5. Interoperability Compliance Testing

The Interoperability Compliance Testing included basic TAPI interoperating and functionality testing only. Performance load testing was not performed. The testing examined the synTelate application interoperability with Avaya IP Office 3.1. The majority of the testing focused on the ability of the synTelate Agent application to perform the following operations: Place/Receive calls Hold and Transfer. Both Inbound and Outbound call scripts were tested. synTelate Designer was used to create scripts for both the Inbound and Outbound campaigns.

5.1. General Test Approach

The general test approach was to create both Inbound and Outbound campaigns using the synTelate Designer script tool. Both Inbound and Outbound calls, exercised Hold/Retrieve and Call Transfer operations on the synTelate Dialer Utility. Customer detail records were created in the synTelate database tables and the records were verified in the synTelate Agent application by running the relevant outbound campaign.

5.2. Test Results

All tests passed. The synTelate application successfully ran inbound and outbound campaigns and the synTelate agent application placed/received, held/retrieved, and transferred calls successfully during the campaign. Agent automatic login is recommended into the Agent CTI. Losing connection to the synTelate Database can cause errors. In such situations, where database connection has been lost by the synTelate Agent application, the user will have to restart the synTelate application. If the database connection is lost to the synTelate Server, then restart the synTelate Server service.

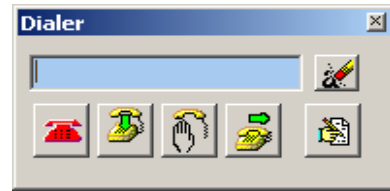
6. Verification Steps

To verify if the synTelate application is installed and operating correctly, perform the following steps on the synTelate Agent PC:

1. Verify Connectivity with Avaya IP Office, log in to the system and go to Start → Programs → Accessories → Communications → Phone Dialer.
In the Phone Dialer window, select Edit → Options.
In the Lines tab of the Options window, select the Phone Calls: drop-down list. If one or more “IP Office Phone: XXX” (where XXX is an extension number) entries appear, then the IP Office TAPI Driver is installed and working properly.
2. Run LogViewer.exe. This is synTelate’s logging tool. It can be found at C:\Program Files\synTelate\Shared. If an error occurs during startup then LogViewer will contain additional information that is useful when tracking the problem.
3. The CTI connection can be checked once synTelate is running. The toolbar will contain a Dialer pad button. This will make the dialer pad visible.



4. The dialer pad can be used to dial a number type into the edit box, hang up, answer an incoming call, put a current call on hold or retrieve a held call.



7. Support

Customers requiring technical support for the synTelate

- Telephone Help Desk Tel: +44 (0)141 552 8800 or 0800 052 1015- this service is provided free to customers who have a current support contract for that product. Our help desk is normally open from 09:00 to 17:00 UK time. We also provide extended and 24x7 support capabilities if required – details are available on request.
- Support on the Web - This service allows customers with a current support contract to log support requests, and view existing requests via the web. This service is available 24hours at <http://support.inisoft.co.uk/start.asp>. If you require a login please contact support@inisoft.co.uk

8. Conclusion

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

9. 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>.

- Avaya IP Office CTI Link Installation Manual, 40DHB0002UKAB – Issue 11a (June 2005)
- Avaya IP Office 3.1 Installation Manual, Issue 13j (Dec 2005)
- Avaya IP Office 3.1 Manager Manual, Issue 17d (Sept 2005)

Company and product information available from Initiative Software.

- Company website:- www.inisoft.co.uk
- Product website:- www.syntelate.com
- synTelate - Pre-install checklist 2005 Vn 2.doc
- Installation Guide For synTelate 2.4vn1.doc
- synTelate v2.4.1 Training Manual 2005 issue 1.0.doc
- synTelate v2.4.1 Additional Features Supplement.doc

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