



Avaya Solution & Interoperability Test Lab

Application Notes for configuring Aperio from Fiserv and Avaya Proactive Contact with PG230 - Issue 1.0

Abstract

These Application Notes describe the configuration steps for Aperio from Fiserv to interoperate with Avaya Proactive Contact using PG230. Aperio is an Agent desktop that can connect and use the Proactive Contact functionality.

Readers should pay attention to **Section 2**, in particular the scope of testing as outlined in **Section 2.1** as well as the observations noted in **Section 2.2**, to ensure that their own use cases are adequately covered by this scope and results.

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

1. Introduction

These Application Notes describe the configuration steps to integrate Avaya Proactive Contact with Aperio.

Aperio consists of a backend Application Server and an agent client. It is a solution for agent desktops in an Avaya call center environment focused on voice.

Aperio database contains customer and third party agency information which is available to Aperio clients. The Aperio client allows connectivity to Avaya Proactive Contact. The client can access stored information from the Aperio database using recognised phone numbers.

2. General Test Approach and Test Results

The general test approach was to configure the Aperio client to communicate with the Proactive Contact. Two Aperio clients were configured. See **Figure 1** for a network diagram. The interoperability compliance test included both feature functionality and serviceability tests focusing on validating successful handling of outbound calls generated by Proactive Contact using the Aperio Client.

Aperio has a Client/Server relationship and Aperio server was installed on a Windows 7 laptop running an MS SQL 2008 R2 database. Connect client software is installed on each client PC utilised by an agent. The Aperio database contains the IP address of the Proactive Contact and the Aperio software references this when connecting to Proactive Contact ensuring that each agent PC will get its connection information to Proactive Contact from a single source i.e., the database on the Aperio server.

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 interoperability compliance test included both feature functionality and serviceability testing. The feature functionality testing focused on Aperio receiving calls in different outbound call scenarios. The tests included:

- Aperio client login to the dialer.
- Aperio client joining an outbound job.
- Aperio client is attached to a headset.
- Calls are delivered to the Aperio client.
- Hold initiated by Aperio client
- Call Wrap up and next call presentation.
- Failover/Service – Tests the behaviour of Aperio Client during certain failed conditions.

2.2. Test Results

All functionality and serviceability test cases were completed successfully. The following observations were noted.

1. Aperio outbound does not support Transfer and conference features.
2. When a job is stopped immediately the current call is lost and Aperio needs to log in after the job has started.
3. Aperio outbound does not support going on a break whilst attached to an outbound job. The agent must logoff the current job.
4. Aperio outbound does not notify the agent of a job being stopped gracefully and the headset remains connected until Aperio is closed and the agent logs in again.
5. Aperio outbound agents can only login after the job has been started.
6. Aperio outbound does not currently control inbound and outbound agents allowing them to function for Blend jobs. Fiserv have an inbound and outbound client but development is required to allow them to work together.

2.3. Support

Graham Hefford
Operations Manager
Agiliti
Fiserv

Office: +44 (0)208 8333193

Mobile: +44 (0)7793 249303

Graham.Hefford@Fiserv.com
www.fiserv.com

3. Reference Configuration

The configuration shown in **Figure 1** was used during the compliance test of Aperio with Proactive Contact.

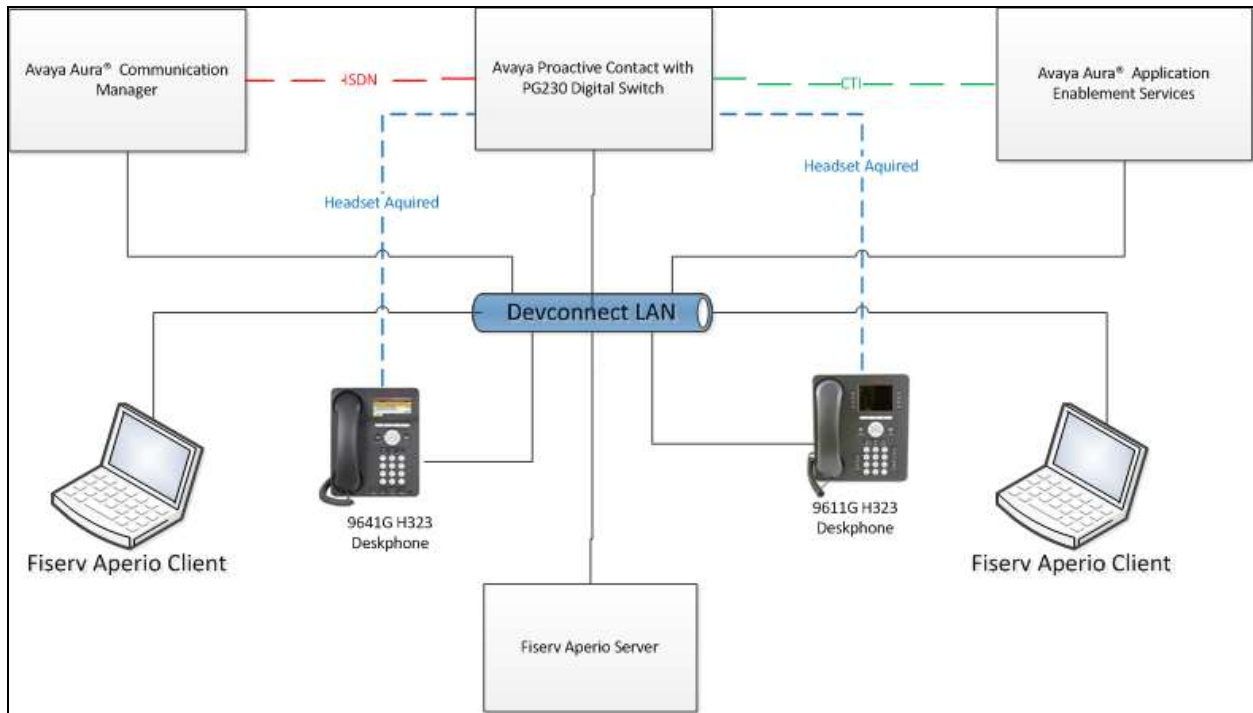


Figure 1: Connection of Fiserv Aperio with Avaya Proactive Contact

4. Equipment and Software Validated

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

Equipment/Software	Release/Version
VMware virtual machine	Avaya Aura® Communication Manager 7.0.1 R17x.00.0.441.0-22477
G430 Media Gateway	FW 37.20.0
Avaya S8730 Server	Avaya Proactive Contact 5.1.1 with Patch 392
VMware virtual machine	Avaya Aura® Application Enablement Services 7.0.0.0.0.13-0
<ul style="list-style-type: none">• Avaya IP Deskphones• 9641G (H.323)• 9611G (H.323)	6.6029
Aperio for Agiliti	9.2

5. Configure Avaya Aura® Communication Manager

The information provided in this section describes the configuration of Communication Manager relevant to this solution. For all other provisioning information such as initial installation and configuration, please refer to the product documentation in **Section 10**.

5.1. Configure AEServices

Use **change node-names ip** to enter the node-name and IP address for the Application Enablement Server. Take a note of the **CLAN** node **Name** and **IP Address**.

change node-names ip		Page	1	of	2
		IP NODE NAMES			
Name	IP Address				
CLAN	10.10.40.31				
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				
devconaes61	10.10.16.30				

In order for Communication Manager to establish a connection to Application Enablement 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 defined in previous step is used.

add cti-link 1		Page	1	of	3
		CTI LINK			
CTI Link: 1					
Extension: 1111					
Type: ADJ-IP					
		COR: 1			
Name: devconaes61					

Using the command **change ip-services**, configure IP-Services for the AESVCS services follows:

change ip-services					Page	1 of 4
IP SERVICES						
Service Type	Enabled	Local Node	Local Port	Remote Node	Remote Port	
CDR1		CLAN	0	IPbuffer	9000	
CDR2		CLAN	0	RDTT	9001	
AESVCS	y	CLAN	8765			

On **Page 4**, set the **AE Services Server** node name and **Password** the AES Server 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:	devconaes61	Avayapassword1	y	in use				

5.2. Configure Avaya Proactive Contact Acquire feature

In order for Proactive Agent Blending to function, Communication Manager must be configured with a VDN monitored by Proactive Contact. When the agents who belong to the skill to which the Acquire VDN routes 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.

add vdn 8274000	Page 1 of 3
VECTOR DIRECTORY NUMBER	
Extension: 8274000	
Name*: Dialer Acquire-Out	
Destination: Vector Number 1	
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 8274000 has a destination of **Vector Number 1**.

change vector 1	Page 1 of 6
CALL VECTOR	
Number: 1 Name: DialerAcquireOut	
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 queue-to	skill 1 pri m
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 using the command **add hunt-group 1** and specify and identifying **Group Name**, **Group Extension**, and setting **ACD**, **Queue** and **Vector** to **y**.

add hunt-group 1		Page 1 of 4
HUNT GROUP		
Group Number: 1		ACD? y
Group Name: Dialer Acquire-Out		Queue? y
Group Extension: 3091		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:	

On Page 2, set **Skill** to **y**

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

5.3. 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 Blending feature, it must be in both the inbound skill (2) and the Acquire skill (1). Using the command **add agent-loginID x** where **x** is a valid extension in the dialplan. Administer the **Name**, **Security Code**, and **Password** fields as shown below.

add agent-loginID 8231001		Page 1 of 3
AGENT LOGINID		
Login ID: 8231001	AAS? n	
Name: Agent1	AUDIX? n	
TN: 1	LWC Reception: spe	
COR: 1	LWC Log External Calls? n	
Coverage Path:	AUDIX Name for Messaging:	
Security Code: 6002	LoginID for ISDN/SIP Display? n	
	Password: 6002	
	Password (enter again): 6002	
	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		

On **Page 2** configure the agent in both the inbound skill and the acquire skill.

add agent-loginID 8231001		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	16:	31:
2: 2	17:	32:
		46:
		47:

5.4. Configure feature access codes for Call Centre features

These will be referenced later in the Proactive Contact Configuration and used by AES to change the state of the agent on Communication Manager during blend operation. Enter the command **change feature-access-codes**, and on **Page 5** configure **Auto-In Access Code**, **Login Access Code** and **Logout Access Code** as per the dialplan.

change feature-access-codes	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: *38	
Aux Work Access Code: *39	
Login Access Code: *40	
Logout Access Code: *41	
Manual-in Access Code: *42	

5.5. Configure Trunks to Avaya PG230 Digital Switch

A number of trunks are required for the purpose of communication between PG230 and Communication Manager. One trunk for calls in each of the following categories.

- Agent Headsets (Dialback)
- Outbound
- Inbound
- Transfer

The physical connection is made between PG230 and the MM710 contained within the G430 Media Gateway. Enter the **add ds1 xxxx** command, where **xxxx** is the location of the DS1 circuit pack and configure as follows:

- | | |
|-------------------------------|---|
| • Name | Set to any descriptive string value, in this case, it was CM-PG230 |
| • Bit Rate | Set to 2.048 |
| • Line Coding | Set to hdb3 |
| • Signaling Mode | Set to isdn-pri |
| • Connect | Set to pbx |
| • Interface | Set to peer-master |
| • Peer Protocol | Set to Q-SIG |
| • Interface Companding | Set to alaw |
| • Idle Code | Set to 01010100 |

```
add ds1 001v2                                     Page 1 of 1
                                         DS1 CIRCUIT PACK

      Location: 001v2                               Name: CM-PG230
      Bit Rate: 2.048                               Line Coding: hdb3

      Signaling Mode: isdn-pri
      Connect: pbx                                   Interface: peer-master
      TN-C7 Long Timers? n                           Peer Protocol: Q-SIG
      Interworking Message: PROgress                  Side: a
      Interface Companding: alaw                      CRC? y
      Idle Code: 01010100                            Channel Numbering: timeslot
                                         DCP/Analog Bearer Capability: 3.1kHz

                                         T303 Timer(sec): 4
                                         Disable Restarts? n

      Slip Detection? y                               Near-end CSU Type: other

      Echo Cancellation? n
```

Configure a Signaling Group for the previously configured DS1 board 001v2. Enter the **add signaling-group n** command, where **n** is an unused signaling group number. Configure as follows:

- **Group Type** Set to **isdn-pri**
- **Primary D-Channel** Enter the DS1 board number followed by 16
- **Trunk Group for Channel Selection** Enter the 1st trunk group number that was configured for DS1 board 001v2 in this case that was trunk group **21**
- **TSC Supplementary Service Protocol** Set to **b**

add signaling-group 10		Page 1 of 1
SIGNALING GROUP		
Group Number: 10	Group Type: isdn-pri	
Associated Signaling? y	Max number of NCA TSC: 0	
Primary D-Channel: 001v216	Max number of CA TSC: 0	
	Trunk Group for NCA TSC:21	
Trunk Group for Channel Selection: 21	X-Mobility/Wireless Type: NONE	
TSC Supplementary Service Protocol: b	Network Call Transfer? n	

Configure a trunk group used for inbound calls. Enter the **add trunk-group n** command, where **n** is an available trunk group number. Configure as follows:

- **Group Type** Set to **isdn**
- **Group Name** Set to any descriptive string value, in this case, it was **QSIG to PG230 - Inbound**
- **TAC** Enter a Trunk Access Code that is valid in the provisioned dial plan
- **Dial Access** Set to **y**
- **Service Type** Set to **tie**

```

add trunk-group 23                                     Page 1 of 21
                                     TRUNK GROUP

Group Number: 23                      Group Type: isdn                      CDR Reports: y
  Group Name: QSIG to PG230 - Inbound  COR: 1                      TN: 1          TAC: 723
    Direction: two-way                Outgoing Display? n          Carrier Medium:
PRI/BRI
  Dial Access? y                      Busy Threshold: 255  Night Service:
Queue Length: 0
Service Type: tie                      Auth Code? n                      TestCall ITC:
rest
                                     Far End Test Line No:
TestCall BCC: 4

```

On **Page 2** of the trunk group configuration, configure as follows:

- **Supplementary Service Protocol** - Set to **b**
- **Disconnect Supervision**
 - **In** - set to **y**
 - **Out** - set to **y**

```

add trunk-group 23                                     Page 2 of 21
  Group Type: isdn

TRUNK PARAMETERS
  Codeset to Send Display: 6          Codeset to Send National IEs: 6
  Max Message Size to Send: 260      Charge Advice: none
  Supplementary Service Protocol: b   Digit Handling (in/out): enbloc/enbloc

  Trunk Hunt: cyclical

                                     Digital Loss Group: 13
Incoming Calling Number - Delete:    Insert:                      Format:
  Bit Rate: 1200                    Synchronization: async    Duplex: full
Disconnect Supervision - In? y  Out? y
Answer Supervision Timeout: 0
  Administer Timers? n              CONNECT Reliable When Call Leaves ISDN? n
                                     Delay Call Setup When Accessed Via IGAR? N

```

On **Page 5**, configure **GROUP MEMBER ASSIGNMENTS** as follows.

- **Port** Enter the DS1 board number followed by the trunk member number. The ports configured on Communication Manager must be mapped to the ports configured on the PG230 Digital Switch
- **Sig Grp** Enter the number of the signaling group configured for the DS1 board 001v2 in this case it is Signaling Group **10**

add trunk-group 21					Page 5 of 21	
					TRUNK GROUP	
					Administered Members (min/max): 1/5	
GROUP MEMBER ASSIGNMENTS					Total Administered Members: 5	
	Port	Code	Sfx	Name	Night	Sig Grp
1:	001v217	MM710	C			10
2:	001v218	MM710	C			10
3:	001v219	MM710	C			10
4:	001v220	MM710	C			10
5:	001v221	MM710	C			10

Note: There is different port numbering between PG230 Digital Switch and Communication Manager; therefore ports 18-22 on PG230 Digital Switch correspond to ports 17-21 on Communication Manager.

Repeat the above configuration steps in order to configure remaining trunk groups for Agent Headsets (Dial Back), Outbound and Transfer calls. For each trunk group make sure that the number of ports in GROUP MEMBER ASSIGNMENTS is correctly mapped to the number of ports configured on the PG230. Also, for every trunk group, configure each port with signaling group 10.

Enter **list trunk-group** command, to list all trunk groups that were configured on Communication Manager. Below is the list of all trunk groups that were configured for the E1 QSIG trunk between Communication Manager and PG230 Digital Switch.

list trunk-group											Page 1
TRUNK GROUPS											
Grp No.	TAC	Group Type	Group Name	No. Mem	TN	COR	CDR	Meas	Dsp	Que Len	
21	721	isdn	QSIG to PG230 - Headsets	5	1	1	y	none	y	0	
22	722	isdn	QSIG to PG230 - Outbound	10	1	1	y	none	n	0	
23	723	isdn	QSIG to PG230 - Inbound	5	1	1	y	none	n	0	
24	724	isdn	QSIG to PG230 - Transfer	5	1	1	y	none	n	0	

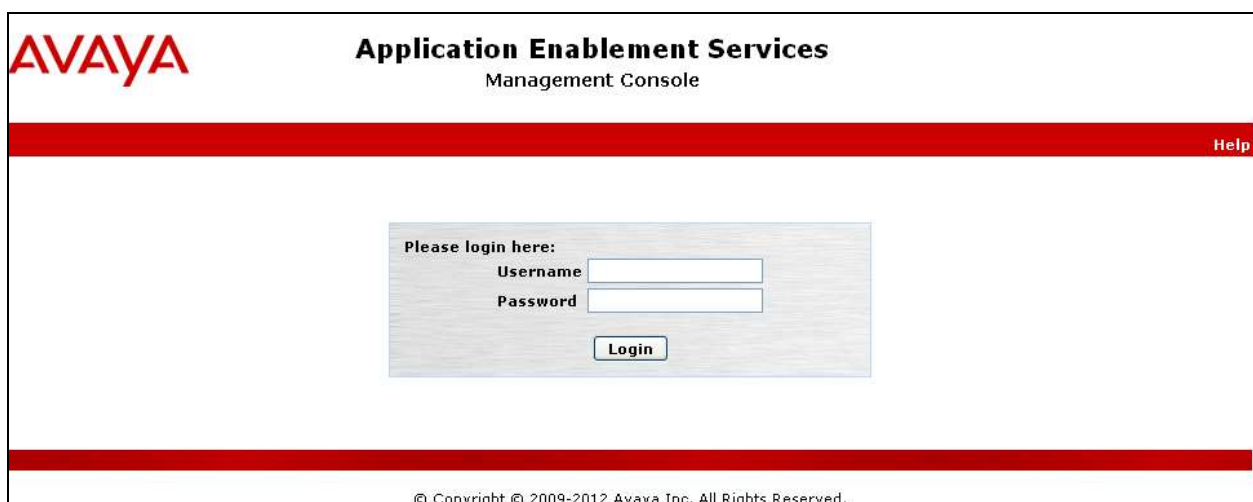
6. Configure Avaya Aura® Application Enablement Services

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

- Verify Licensing.
- Create Switch Connection.
- Administer TSAPI link.
- Enable DMCC Ports.
- Create CTI User.
- Associate Devices with CTI User.

6.1. Verify Licensing

To access the AES Management Console, enter **https://<ip-addr>** as the URL in an Internet browser, where <ip-addr> is the IP address of AES. At the login screen displayed, log in with the appropriate credentials and then select the **Login** button.



AVAYA **Application Enablement Services**
Management Console

[Help](#)

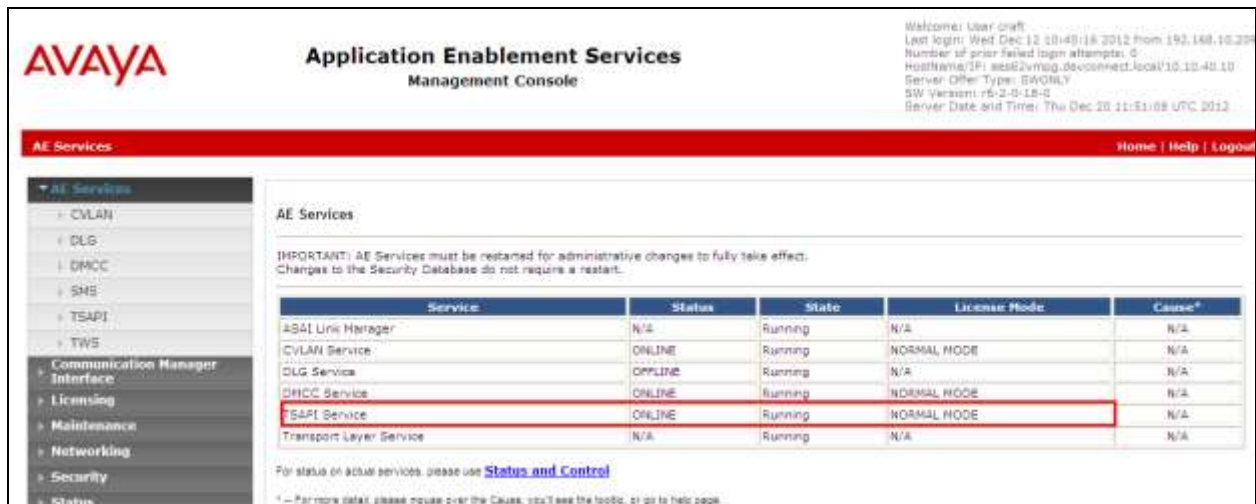
Please login here:

Username

Password

© Copyright © 2009-2012 Avaya Inc. All Rights Reserved.

The Application Enablement Services Management Console appears displaying the **Welcome to OAM** screen (not shown). Select **AE Services** and verify that the TSAPI Service is licensed by ensuring that **TSAPI Service** is in the list of **Services** and that the **License Mode** is showing **NORMAL MODE**. If not, contact an Avaya support representative to acquire the proper license for your solution.



AVAYA Application Enablement Services Management Console

Welcome! User: craft
Last login: Wed Dec 12 10:48:16 2012 from 193.168.10.208
Number of prior failed login attempts: 0
HostName/IP: aes62vmag.devconnect.local/10.10.40.10
Server Offer Type: SWONLY
SW Version: r6-2.0-18-0
Server Date and Time: Thu Dec 20 11:51:09 UTC 2012

AE Services Home | Help | Logout

AE Services

IMPORTANT! AE Services must be restarted for administrative changes to fully take effect. Changes to the Security Database do not require a restart.

Service	Status	State	License Mode	Cause ¹
ASAI Link Manager	N/A	Running	N/A	N/A
CVLAN Service	ONLINE	Running	NORMAL MODE	N/A
DLG Service	ONLINE	Running	N/A	N/A
DMCC Service	ONLINE	Running	NORMAL MODE	N/A
TSAPI Service	ONLINE	Running	NORMAL MODE	N/A
Transport Layer Service	N/A	Running	N/A	N/A

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

¹ - For more detail, please mouse over the Cause; you'll see the tooltip, or go to help page.

6.2. Create Switch Connection

From the AES Management Console navigate to **Communication Manager Interface** → **Switch Connections** to set up a switch connection. Enter a name for the Switch Connection to be added and click the **Add Connection** button.



AVAYA Application Enablement Services Management Console

Welcome! User: craft
Last login: Thu Nov 14 20:22:12 2012 from 10.10.40.140
Number of prior failed login attempts: 16
HostName/IP: AES63VHFG
Server Offer Type: VIRTUAL_APPLIANCE_ON_VMWARE
SW Version: 6.3.0.8.212-0
Server Date and Time: Tue Dec 3 15:33:26 UTC 2013

Communication Manager Interface | Switch Connections Home | Help | Logout

Switch Connections

CM62VHFG Add Connection

Connection Name	Processor Ethernet	Mag Period	Number of Active Connections

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

In the resulting screen enter the **Switch Password**; the Switch Password must be the same as that entered into Communication Manager AE Services Administration screen via the **change ip-services** command, described in **Section 5.1** Default values may be accepted for the remaining fields. Click **Apply** to save changes.

AVAYA Application Enablement Services Management Console

Welcome: User: cm6j
Last login: Thu Nov 14 10:22:12 2013 from 10.10.40.140
Number of prior failed login attempts: 16
HostName/IP: AES63Jmmpg
Server Offer Type: VIRTUAL_APPLIANCE_ON_VMWARE
SW Version: 6.3.0.0.113-0
Server Date and Time: Tue Dec 3 15:35:47 UTC 2013

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 - CM6Jmmpg

Switch Password: [REDACTED]
Confirm Switch Password: [REDACTED]
Tag Period: 30 Minutes (1 - 72)
SSL: [X]
Processor Ethernet: [X]
[Apply] [Cancel]

From the **Switch Connections** screen, select the radio button for the recently added switch connection and select the **Edit PE/CLAN IPs** button (not shown). In the resulting screen, enter the IP address of the procr as shown in **Section 5.1** that will be used for the AES connection and select the **Add/Edit Name or IP** button.

AVAYA Application Enablement Services Management Console

Welcome: User: cm6j
Last login: Thu Nov 14 10:22:12 2013 from 10.10.40.140
Number of prior failed login attempts: 16
HostName/IP: AES63Jmmpg
Server Offer Type: VIRTUAL_APPLIANCE_ON_VMWARE
SW Version: 6.3.0.0.113-0
Server Date and Time: Tue Dec 03 15:36:31 UTC 2013

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 - CM6Jmmpg

10.10.40.31 [Add/Edit Name or IP]

Name or IP Address	Status
10.10.40.31	In Use

[Back]

6.3. Administer TSAPI link

From the Application Enablement Services Management Console, select **AE Services** → **TSAPI** → **TSAPI Links**. Select **Add Link** button as shown in the screen below.



On the **Add TSAPI Links** screen (or the **Edit TSAPI Links** screen to edit a previously configured TSAPI Link as shown below), enter the following values:

- **Link:** Use the drop-down list to select an unused link number.
- **Switch Connection:** Choose the switch connection **CM63VMPG**, which has already been configured in **Section 7.2** from the drop-down list.
- **Switch CTI Link Number:** Corresponding CTI link number configured in **Section 5.1** which is **1**.
- **ASAI Link Version:** This can be left at the default value of **5**.
- **Security:** This can be left at the default value of **both**.

Once completed, select **Apply Changes**.



Another screen appears for confirmation of the changes made. Choose **Apply**.



When the TSAPI Link is completed, it should resemble the screen below.



The TSAPI Service must be restarted to effect the changes made in this section. From the Management Console menu, navigate to **Maintenance → Service Controller**. On the Service Controller screen, tick the **TSAPI Service** and select **Restart Service**.



6.4. Enable DMCC Ports

To ensure that DMCC ports are enabled, navigate to **Networking → Ports**. In the section **DMCC Server Ports**, ensure that the **Unencrypted Port** is set to **Enabled** as shown below.

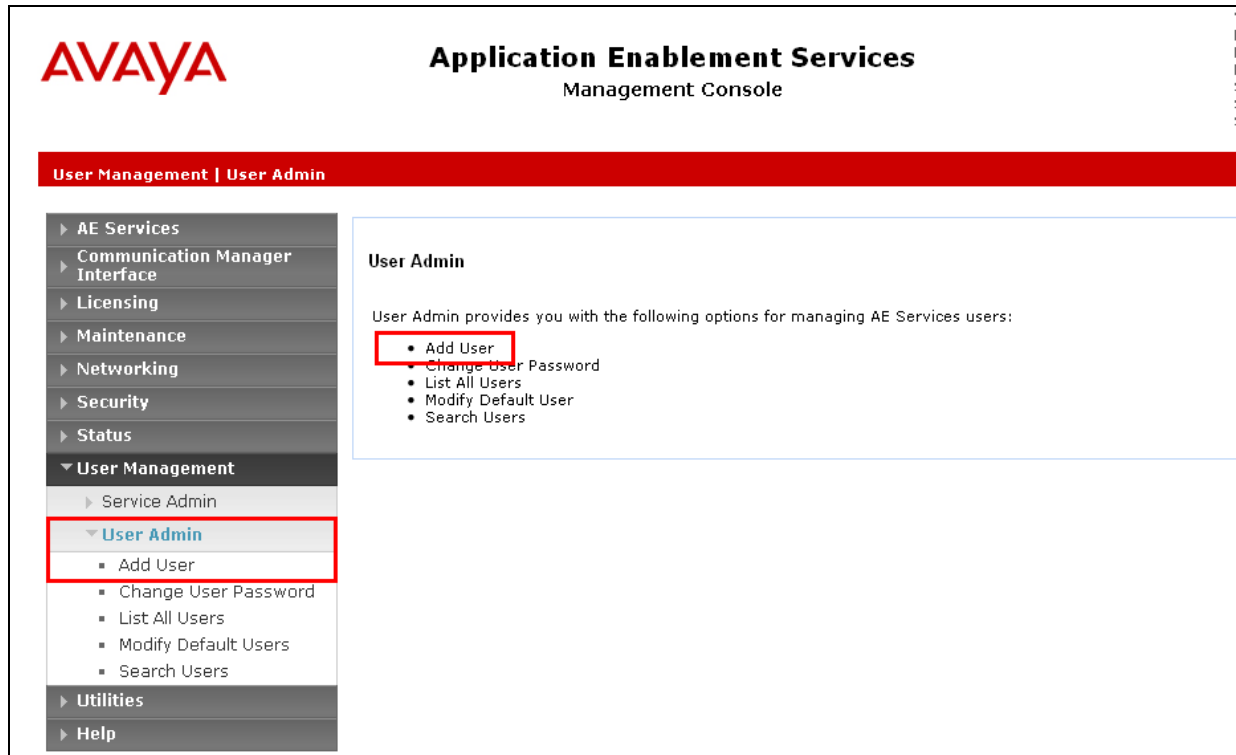
The screenshot displays the Avaya configuration interface. On the left is a navigation menu with the following items: Interface, High Availability, Licensing, Maintenance, Networking (expanded), AE Service IP (Local IP), Network Configure, Ports (highlighted with a red box), TCP Settings, Security, Status, User Management, Utilities, and Help. The main content area shows various port configuration sections. The 'DMCC Server Ports' section is highlighted with a red box and contains the following settings:

DMCC Server Ports		Enabled	Disabled
Unencrypted Port	4721	<input checked="" type="radio"/>	<input type="radio"/>
Encrypted Port	4722	<input checked="" type="radio"/>	<input type="radio"/>
TR/87 Port	4723	<input checked="" type="radio"/>	<input type="radio"/>

Below this section, the 'H.323 Ports' section is visible, showing settings for TCP Port Min (20000), TCP Port Max (24999), Local UDP Port Min (30000), Local UDP Port Max (34999), and Server Media (Enabled). At the bottom, there is a note: '* Note: The number of RTP ports needs to be double the number of extensions using server media.'

6.5. Create CTI User

A User ID and password needs to be configured for the Aperio server to communicate as a TSAPI client with the Application Enablement Services server. Navigate to the **User Management** → **User Admin** screen then choose the **Add User** option.



In the **Add User** screen shown below, enter the following values:

- **User Id** - This will be used by the Aperio Server to connect to AES.
- **Common Name** and **Surname** - Descriptive names need to be entered.
- **User Password** and **Confirm Password** - This will again be used by the Aperio Server.
- **CT User** - Select **Yes** from the drop-down menu.

AVAYA Application Enablement Services Management Console

Welcome! User: cust
Last login: Tue Sep 13 09:17:54 2013 from 10.10.
Number of prior failed login attempts: 0
HostName/IP: DevConAS1624/10.10.18.14
Server Offer Type: SWONLY
SW Version: 6.3.4.10-0
Server Date and Time: Wed Sep 16 08:14:12 UTC

User Management | User Admin | List All Users

Edit User

* User Id:
* Common Name:
* Surname:
User Password:
Confirm Password:
Admin Note:
Avaya Role:
Business Category:
Car License:
CM Home:
Ccs Home:
CT User:

Complete the process by choosing **Apply** at the bottom of the screen.

User Management

Service Admin
User Admin
Add User
Change User Password
List All Users
Modify Default Users
Search Users
Utilities
Help

Avaya Role:
Business Category:
Car License:
CM Home:
Ccs Home:
CT User:
Department Number:
Display Name:
Employee Number:
Employee Type:
Enterprise Handle:
Given Name:
Home Phone:
Home Postal Address:
Initials:
Labeled URI:
Mail:
MM Home:
Mobile:
Organization:
Pager:
Preferred Language:
Room Number:
Telephone Number:
Apply Changes Cancel Changes

The next screen will show a message indicating that the user was created successfully (not shown).

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
- Configure Avaya Proactive Contact with CTI for Agent Blending
- Configure master.cfg
- Configure number format
- Configure the calling list
- Configure Avaya Proactive Contact Administration Software

7.1. Verify Avaya Proactive Contact Licensing

Access the Web License Manager of the Avaya Proactive Contact, in this instance using the URL <https://10.10.16.91:52233/WebLM/>. 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) [Logout](#)

Install License **Avaya_Proactive_Contact - Release: 5 - SID: 11018150 (Standard License File)**

Licensed Products
Avaya_Proactive_Contact
 Uninstall License
 Change Password
 Server Properties
 Manage Users
 Logout

You are here: Licensed products > Avaya_Proactive_Contact

License installed on: 20-May-2011 13:25:58 o'clock EDT

[View Peak Usage](#)

Feature (Keyword)	Expiration Date	Licensed	Acquired
Number of PBX Agents using Avaya CT with predictive (VALUE_APC_PREDICTIVECTAGENTS)	permanent	100	0
Number of telephone lines (VALUE_APC_PHONELINES)	permanent	100	0
Number of Agents with Predictive Dialing (VALUE_APC_PREDICTIVE_AGENTS)	permanent	100	0
Number of PBX Agents using Avaya CT (VALUE_APC_TOTALCTTAGENTS)	permanent	100	0
Number of Supervisor Workstations (VALUE_APC_SUPERVISORS)	permanent	10	0
Number of Agents (VALUE_APC_TOTAL_AGENTS)	permanent	100	0

Acquired Licenses

7.2. Configure CTI

In order to establish the TSAPI link between Proactive Contact and Application Enablement Services Server, the relevant files were edited. From the Proactive Contact Telnet Session create a `cti_passwd.cfg` file by doing 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 in **Section 6.5**, and hit return, re-enter as requested.

Navigate to the `/opt/avaya/pds/config/swif_ct.cfg` file and change the parameters as shown follows.

```
SERVER:AVAYA#CM#CSTA-S#DEVCONAES61
LOGIN:syntelate
REASONCODE:1
PHANTOMNUMBERS:1850-1854
WORKMODE:AUTO_IN
AGENTANSWER:NO
PRIORITYCALL:NO
```

Notes: The Tlink and the Proactive Contact CTI username as configured in **Section 6.5**.

Navigate to the `/opt/avaya/pds/config/` directory. Copy and rename the `tslibrc` file, by typing `cp tslibrc .tslibrc`. Edit `.tslibrc` with the IP Address of the Application Enablement Services Server, 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
10.10.16.30
;

; 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 Agent Blending, copy the .tslibrc file to the /opt/avaya/pab/config/ directory by entering the command **cp /opt/avaya/pab/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
```

Edit **dgswitch.cfg** as shown below. The format used is based on the location of the ports in the PG230 Digital Switch; therefore Proactive Contact is configured with the same number of Inbound Ports as the number of inbound lines on the PG230 Digital Switch. The inbound ports configured on Proactive Contact correspond to the ports of the inbound trunk group configured on Communication Manager in **Section 5.5**; the same is true for Headset, Outbound and Transfer trunk ports.

```
# Headset Ports
H:1:361:1::#H:15:1:1-1-21-4-2
H:2:362:1::#H:15:1:1-1-21-4-3
H:3:363:1::#H:15:1:1-1-21-4-4
H:4:364:1::#H:15:1:1-1-21-4-5
H:5:365:1::#H:15:1:1-1-21-4-6

# Normal Outbound Trunks
N:1:366:1::#O:10:1:1-1-21-4-7
N:2:367:1::#O:10:1:1-1-21-4-8
N:3:368:1::#O:10:1:1-1-21-4-9
N:4:369:1::#O:10:1:1-1-21-4-10
N:5:370:1::#O:10:1:1-1-21-4-11
N:6:371:1::#O:10:1:1-1-21-4-12
N:7:372:1::#O:10:1:1-1-21-4-13
N:8:373:1::#O:10:1:1-1-21-4-14
N:9:374:1::#O:10:1:1-1-21-4-15
N:10:375:1::#O:10:1:1-1-21-4-16

# Normal Inbound Trunks

N:11:377:1::#I:11:1:1-1-21-4-18
N:12:378:1::#I:11:1:1-1-21-4-19
N:13:379:1::#I:11:1:1-1-21-4-20
N:14:380:1::#I:11:1:1-1-21-4-21
N:15:381:1::#I:11:1:1-1-21-4-22

# Transfer-thru Trunks
T:1:12:1::#T:12:1:1-1-21-4-1
```

Edit only the last 4 lines of **voicemsg.cfg**, this file refers to the announcements recorded on the PG230.

```
250:greeting:1027:Female:Folder4:Voice:Message27
251:inbound:1028:Female:Folder4:Voice:Message28
252:outbound:1029:Female:Folder4:Voice:Message29
253:notLoggedIn:1030: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 command **cp telephny_hd.spt telephny.spt**. This file defines Hard Dialer specific parameters.

Navigate to the **/opt/avaya/pds/shell/** directory and edit the **pdscontrol** file. This script starts the agent binary during pds_stop/start. Normally it is set to **agent -d** which starts the agent binary as a daemon. Make the following change to this line in the script for the purposes of Proactive Agent Blending.

agent -m -d

7.3. Configure Avaya Proactive Contact with CTI for Agent Blending

From the Proactive Contact Telnet Session 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 in **Section 6.5**.

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#CM#CSTA-S#DEVCONAES61:pc5hd:PDS:TS2
chgsvr
cep_pway
```

Copy and rename the CBA_procs.example file, type **cp CBA_procs.example CBA_procs** and edit **CBA_procs** 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|devconhd|/opt/avaya/pab/bin/|cbauser|1
CTI|devconhd|/opt/avaya/pab/bin/|cti|1
ACD|devconhd|/opt/avaya/pab/bin/|acdmon|1 nocancel min_asa 2sec gen_rel
MSC|devconhd|/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 NORTH_USA, an IB (inbound) Domain called 8274002, with specific reference to VDN 8274002, and a TEAM (acquire) Domain called 8274000 with specific reference to VDN 8274000. Both of these Domain have a Domain Group ID of NORTH_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 | NORTH_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 | 8274000 | 8274000 | NORTH_USA | 1 | 1 | 1 |
#      1 | TEAM |
#
# *DM | 8274002 | 8274002 | NORTH_USA | 1 | 1 | 1 |
#      1 | IB |

```


Edit **ACD.cfg** – This file contains the Communication Manager feature access codes for ACD login and logouts noted in **Section 5.5** and also specifies the **TESTMODE**, configured as shown below:

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

Edit **acd_ext.cfg** – This file contains the Communication Manager extension number which Proactive Contact Agents and ACD Agents will be logging in, as show below, extension **8231001** is the extension onto which agents are logged into in this case:

```
1:8231001
```

Agent Blending is a feature add-on for Proactive Contact. Ensure that PDS is stopped and as root, enter the command **menu install** which will run a script. When prompted Select option **2**. For **Value added products**, and then **2** again for **Install Predictive Agent Blend** and follow the instructions prompted on screen as shown below:

```
Have you stopped PDS processes: y
Following AES servers are configured:
10.10.16.30 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#CM#CSTA-S#DEVCONAES61
Do you want to change it now?: n
AES_USER set to pc5hd
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, located in **/opt/avaya/pds/etc** were made as follows.

```
CALL_BLENDING: YES
DBKGROUP: 15,1,1
DBSERVERIP: 10.10.16.91
IICB_HOST: devconhd
INBNDSYS: YES
LINEASSIGN: REG,O=1-10;INB,I=11-15
NAMESERVICEHOST: devconhd
OPERATORS: 5
OPLIMIT: I=5,O=5,B=5,P=5,M=5
PORTS: 15
PRIMARY: YES
SWITCHNAME: switch1
SWITCHTESTMODE: NO
SWITCHTYPE: DIGITAL
VISUAL_CPA: YES
WEBLMURL: http://10.10.16.91,8080/WebLM/LicenseServer:
```

Note: INBNDSYS was set to **YES** for the purposes of Fiserv testing.

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 calls. The last line in the file is configured as follows:

```
STD TO DIALFMT: *:ALLTYPES:10:8230003::
```

In this instance, of the digits dialed, **10** are deleted and the digits **8230003** are inserted.

7.6. Configure Calling List

Proactive Contact is delivered with default calling lists. The author assumes an inbound and outbound calling list is created using Proactive Contact Editor. The administration of calling lists is outside of the scope of this document.

7.7. Configure Avaya Proactive Contact Administration Software

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

7.7.1. Configure Windows Host File

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

10.10.16.91 devconhd

7.7.2. Check Avaya Proactive Contact Services

Ensure all necessary services are running on the Proactive Contact Server. The following commands start, check and stop the three 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
```

7.7.3. Configure Avaya Proactive Contact Administration Software

Double click on the Health Manager icon on the desktop. The screen below will be presented; complete it as shown with the Proactive Contact IP address and hostname.

The screenshot shows a Windows-style dialog box titled "Configurator". Inside, there is a text box with the instruction: "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 for configuration:

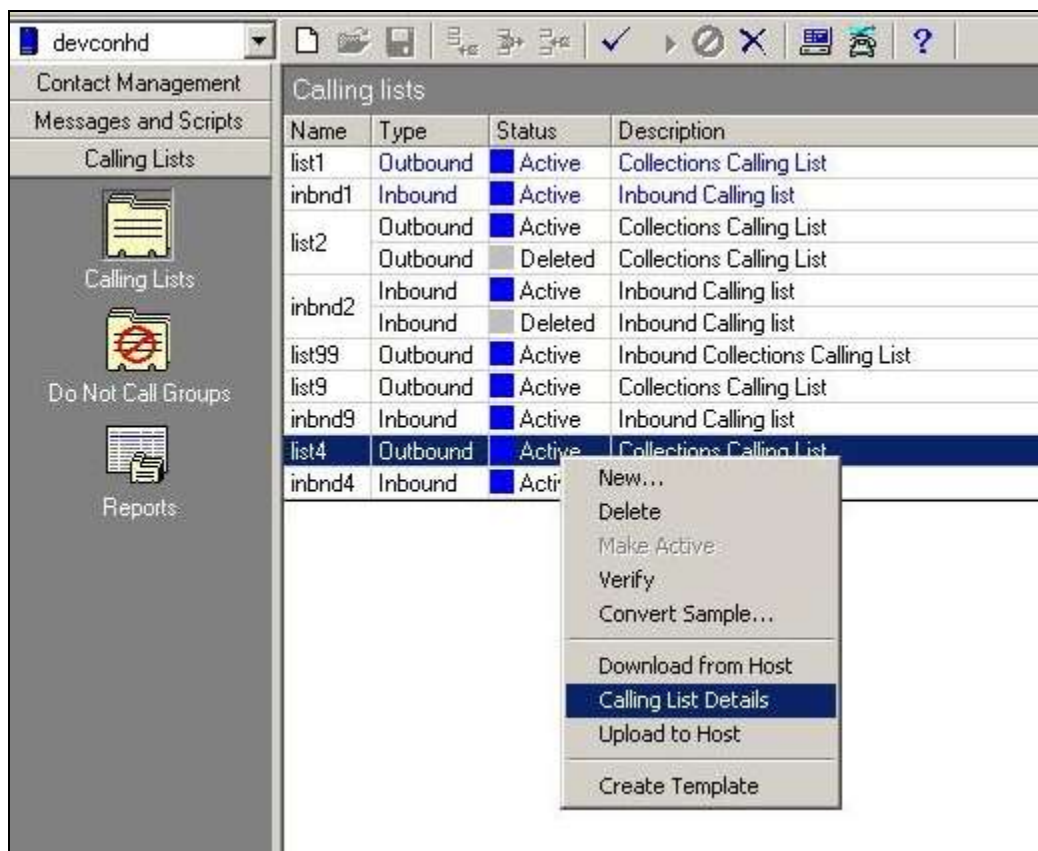
- Primary Proactive Contact Details:** Contains a "Name:" field with the value "devconhd" and an "IP Address:" field with the value "10 . 10 . 16 . 91".
- Use primary server for email and database:** A checkbox that is checked.
- Email Server Details:** Contains a "Name:" field with the value "devconhd" and an "IP Address:" field with the value "10 . 10 . 16 . 91".
- Database Server Details:** Contains a "Name:" field with the value "devconhd" and an "IP Address:" field with the value "10 . 10 . 16 . 91".

At the bottom of the dialog are "OK" and "Cancel" buttons.

It is now possible to 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.

7.7.4. Configure Native Voice and Data Transfer Parameters (NVDT)

NVDT is the feature used when transferring caller details from the outbound job to the inbound job. In this instance, an agent logged into the inbound job will receive the account number as well as the voice path. These parameters are configured in the calling list, as shown below. In the left hand pane click **Calling Lists** → **Calling Lists** right click on **list4** and select **Calling List Details**.



Click to place a tick in the field to enable NVDT (Native Voice and Data Transfer).

The screenshot shows the 'devconhd' application interface. On the left is a sidebar with icons for 'Calling Lists', 'Do Not Call Groups', and 'Reports'. The main window is titled 'Calling lists: Active list4'. It contains a table with columns: Name, Type, Status, and Description. The table lists several calling lists, including 'list1', 'inbnd1', 'list2', 'inbnd2', 'list99', 'list9', 'inbnd9', 'list4', and 'inbnd4'. The 'list4' row is selected. To the right of the table is a 'Features' tab, which is active. It contains a 'Calling List Dictionary' section with a table of features. The 'Native Voice and Data Transfer' checkbox is checked.

Name	Type	Status	Description
list1	Outbound	Active	Collections Calling List
inbnd1	Inbound	Active	Inbound Calling list
list2	Outbound	Active	Collections Calling List
list2	Outbound	Deleted	Collections Calling List
inbnd2	Inbound	Active	Inbound Calling list
inbnd2	Inbound	Deleted	Inbound Calling list
list99	Outbound	Active	Inbound Collections Calling List
list9	Outbound	Active	Collections Calling List
inbnd9	Inbound	Active	Inbound Calling list
list4	Outbound	Active	Collections Calling List
inbnd4	Inbound	Active	Inbound Calling list

Name	Details
General	
Number of phone fields	2
List is part of Do Not Call group	<input type="checkbox"/>
Post Update	<input checked="" type="checkbox"/>
Number of phones to update	2
Number of call attempts to keep	5
Maintain history of attempts	Keep initial
Update record codes	2,3,11,13
Infinite Job	<input type="checkbox"/>
Key for removing duplicate records	
Key for indexing records	
Key for indexing Do Not Call processing	
LATELIST	<input type="checkbox"/>
Match compcodes	
Sort newly downloaded records	<input type="checkbox"/>
Key for sorting	
Campaign Update	<input type="checkbox"/>
Update Mode	
Native Voice and Data Transfer	<input checked="" type="checkbox"/>
Sales Verification	<input checked="" type="checkbox"/>

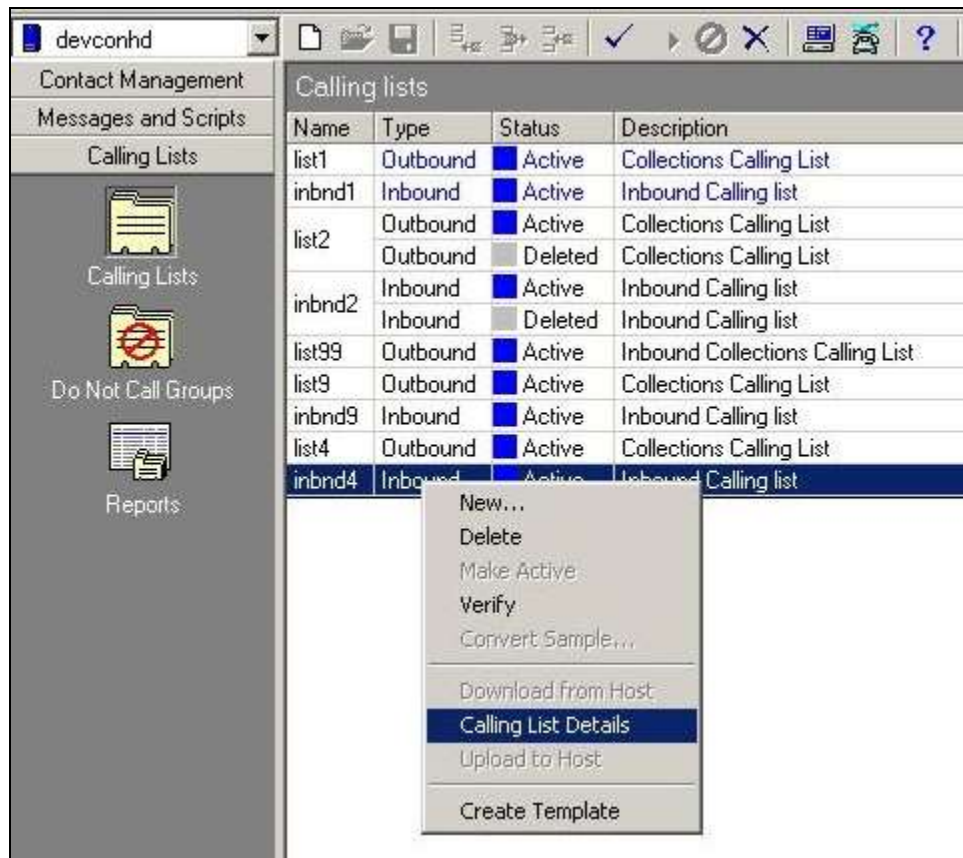
Click on the **Calling List Dictionary** tab, and click to place a tick in the **NVDT** column next to **ACCTNUM**, ensure the **LENGTH** field is set to **25** and save (not shown) when completed.

The screenshot shows the 'devconhd' application interface. On the left is a sidebar with icons for 'Calling Lists', 'Do Not Call Groups', and 'Reports'. The main window is titled 'Calling lists: Active list4'. It contains a table with columns: Name, Type, Status, and Description. The table lists several calling lists, including 'list1', 'inbnd1', 'list2', 'inbnd2', 'list99', 'list9', 'inbnd9', 'list4', and 'inbnd4'. The 'list4' row is selected. To the right of the table is a 'Calling List Dictionary' tab, which is active. It contains a table of fields. The 'ACCTNUM' field is highlighted, and the 'NVDT' checkbox is checked.

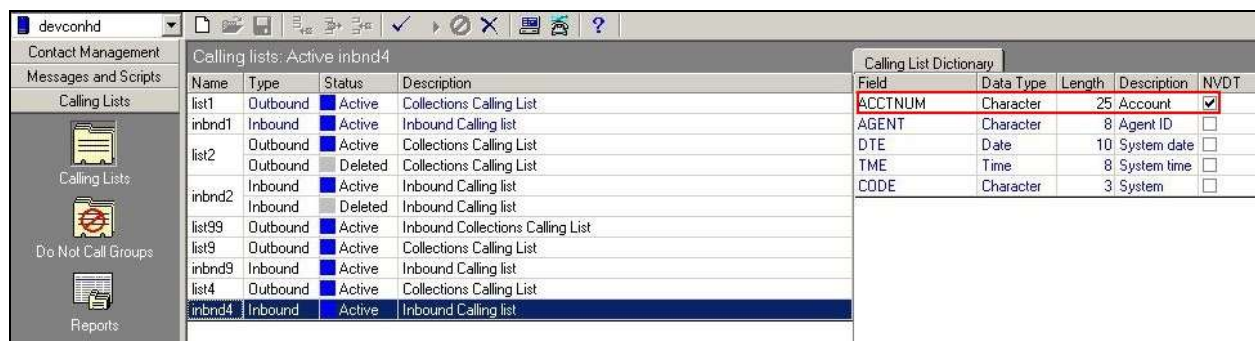
Name	Type	Status	Description
list1	Outbound	Active	Collections Calling List
inbnd1	Inbound	Active	Inbound Calling list
list2	Outbound	Active	Collections Calling List
list2	Outbound	Deleted	Collections Calling List
inbnd2	Inbound	Active	Inbound Calling list
inbnd2	Inbound	Deleted	Inbound Calling list
list99	Outbound	Active	Inbound Collections Calling List
list9	Outbound	Active	Collections Calling List
inbnd9	Inbound	Active	Inbound Calling list
list4	Outbound	Active	Collections Calling List
inbnd4	Inbound	Active	Inbound Calling list

Field	Data Type	Length	Description	NVDT	RSM	Label
ACCTNUM	Character	25	ACC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
BALANCE	Currency	20	BALANCE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TOTALDUE	Currency	10	TOTAL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NAME1	Character	25	NAME	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NAME2	Character	25	NAME	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CITY	Character	25	City	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
STATE	Character	2	State	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ZIPCODE	Numeric	5	ZIPCODE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PHONE1	Character	12	HOME	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PHONE2	Character	12	BUSINESS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COMMENT1	Character	60	COMMENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AGENT	Character	8	AGENT ID	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

The same needs to be performed for the **inbnd4** list. Right click on **inbnd4** and select **Calling List Details**.

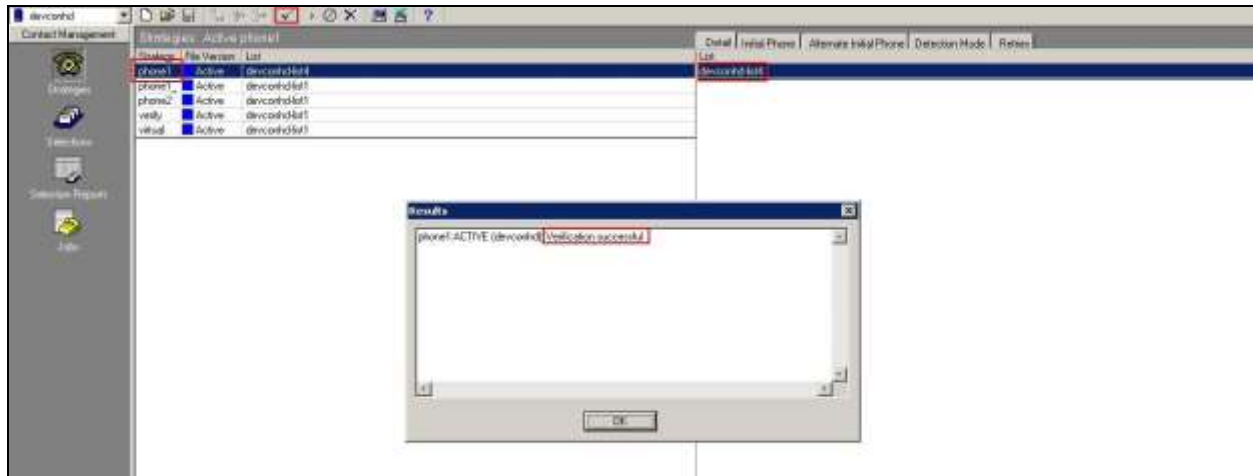


Click to place a tick in the column next to **ACCTNUM**, and ensure the **LENGTH** field is set to **25**. Save when completed (not shown).




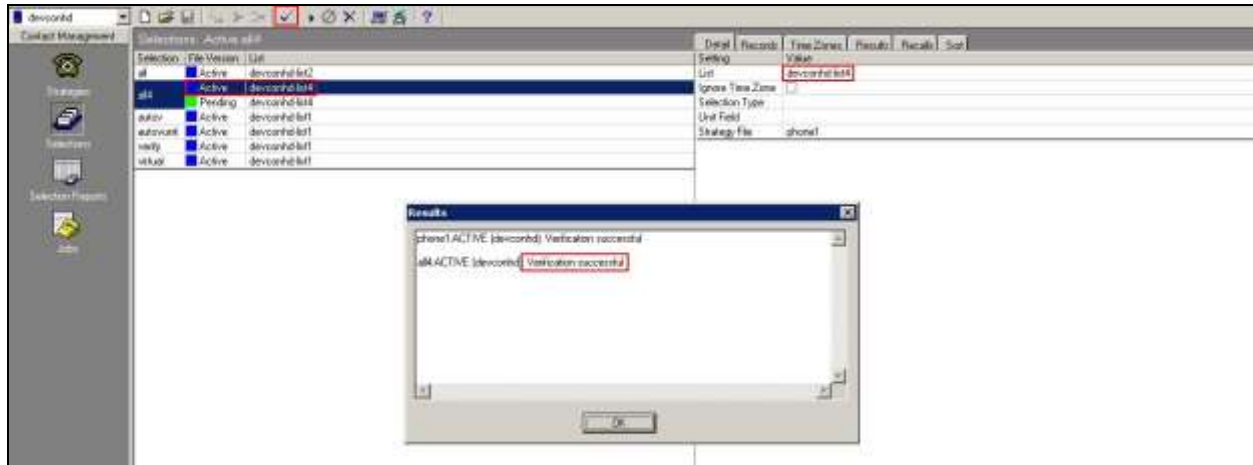
7.7.5. Configure Strategy


Assuming that strategy **phone1** and calling list **list4** (as specified in the previous section), are being used, configure editor as shown below and click verify. Ensure verification is successful.

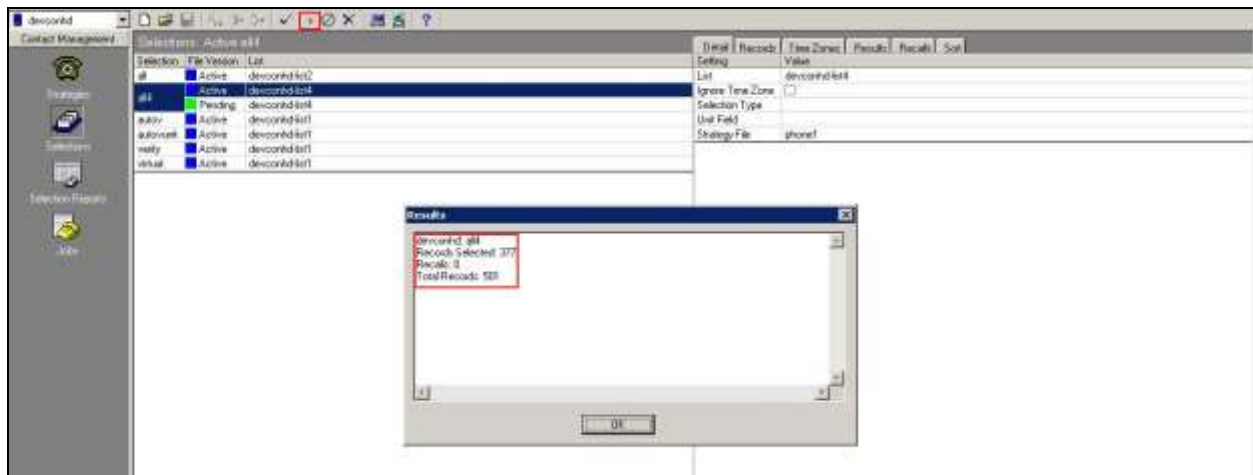


7.7.6. Configure Selections

Click **Selections**, select **all4**, and clicking **list4**, click verify  and ensure verification is successful.



Click **Run** , and ensure that the **Results** pop-up screen shows some records in the **Records Selected** field.



7.7.7. Configure Outbound Job

Click **Jobs**, select **outbnd2** and configure as shown below:

Note: Name of inbound job to transfer calls to field is set to **inbnd1**.

The screenshot displays the Avaya Contact Management application window. The left sidebar contains navigation options: Strategies, Selections, Selection Reports, and Jobs. The 'Jobs' section is active, showing a list of jobs. The job 'outbnd2' is selected and highlighted in blue. The main pane on the right shows the configuration details for 'outbnd2'.

Job	Job type	File Version	Outbound list	Inbound list	Status
blend	Blend	Active	devconhd-list1	devconhd-inbnd1	Stopped
inbnd1	Inbound	Active		devconhd-inbnd4	Stopped
inbnd2	Inbound	Active		devconhd-inbnd2	Stopped
managed	Managed	Active	devconhd-list1		Stopped
outbnd	Outbound	Active	devconhd-list4		Stopped
outbnd2	Outbound	Active	devconhd-list4		Stopped
rtbnd	Outbound	Active	devconhd-list1		Stopped
virtual	Virtual	Active	devconhd-list1		Stopped

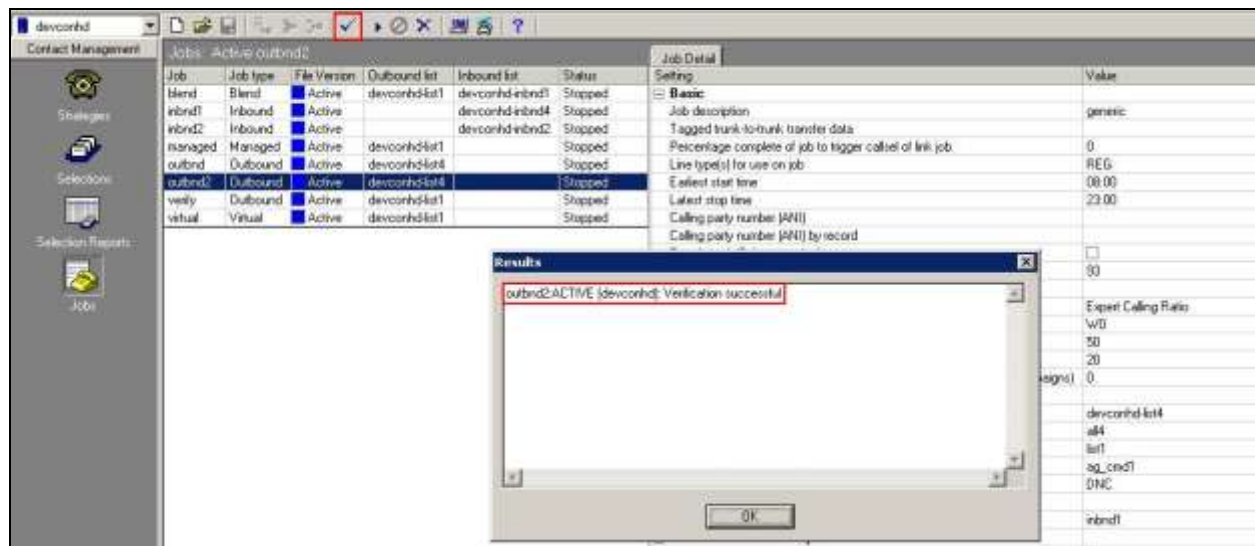
The configuration details for 'outbnd2' are as follows:

- Basic**
 - Job description: generic
 - Tagged trunk-to-trunk transfer date
 - Percentage complete of job to trigger call 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)
 - 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: 30
 - Call Phone Campaign Call Progress (valid values 1-4, 0 for regular campaigns): 0
- Files**
 - Outbound calling list: devconhd-list4
 - Record selection file name: all
 - Outbound screen(s): list
 - Agent keys definition file name: ag_cmsd1
 - Do Not Call group name: DNC
 - Name of new 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 DFCOM: ☐
 - Start Observe how when: Customer begins to speak
- Labels**
 - Script label to use for making call: wait1_f
 - Main data processing label: generic

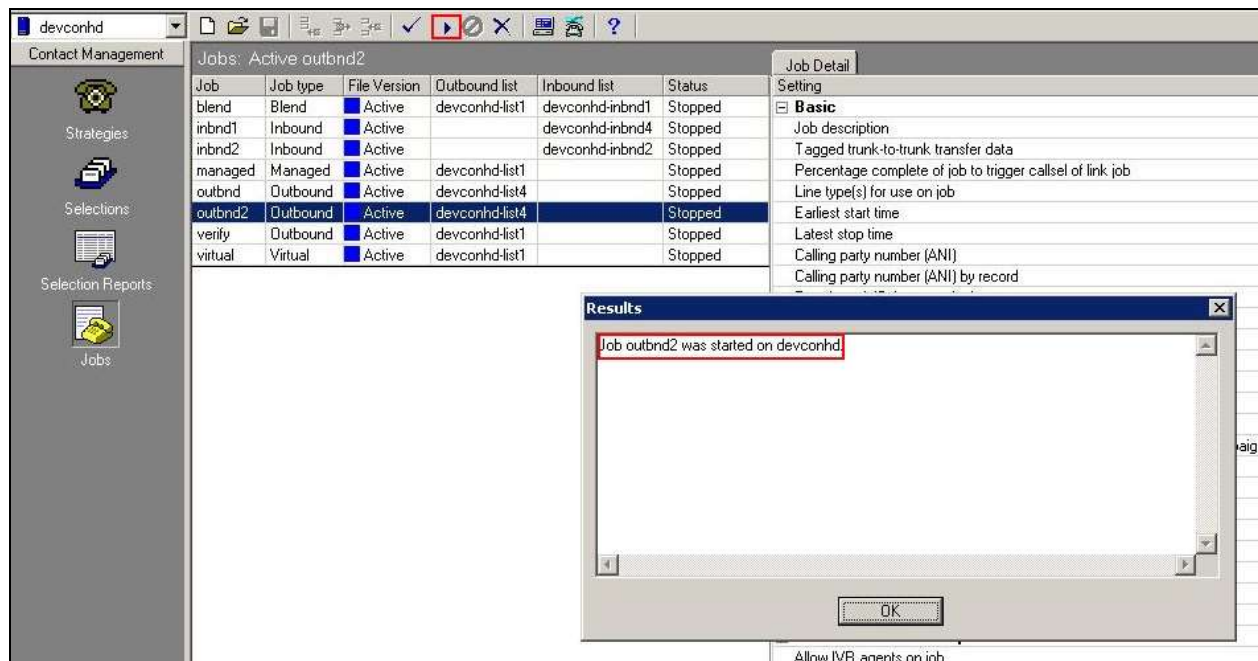
Continued from previous screenshot.

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	<input type="checkbox"/>
Allow agents to cancel call in preview mode	<input type="checkbox"/>
Time limit (seconds) for preview	10
Display empty record at preview	<input type="checkbox"/>
Allow dialing from deleted record	<input type="checkbox"/>
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	<input type="checkbox"/>
Make alternate phone lowest priority in selecting next record	<input type="checkbox"/>
Order calling of records by time zone	<input type="checkbox"/>
VDN needed by the CTI Dialer only	
Post Processing	
Automatically start Update mode on customer hang-up	<input type="checkbox"/>
Quota Settings	
Quota setting (completion code,quota)	
Quota settings file name	
Save quota setting when the job ends	<input type="checkbox"/>
Recall	
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	
Service Level	
Desired service level (percentage)	
Time to connect tolerance (seconds)	
Ofcom Timer	2
Wait Queues	
Total wait delay (seconds)	90
Number of message to play while on hold awaiting transfer	

Click verify  and ensure verification completes successfully.



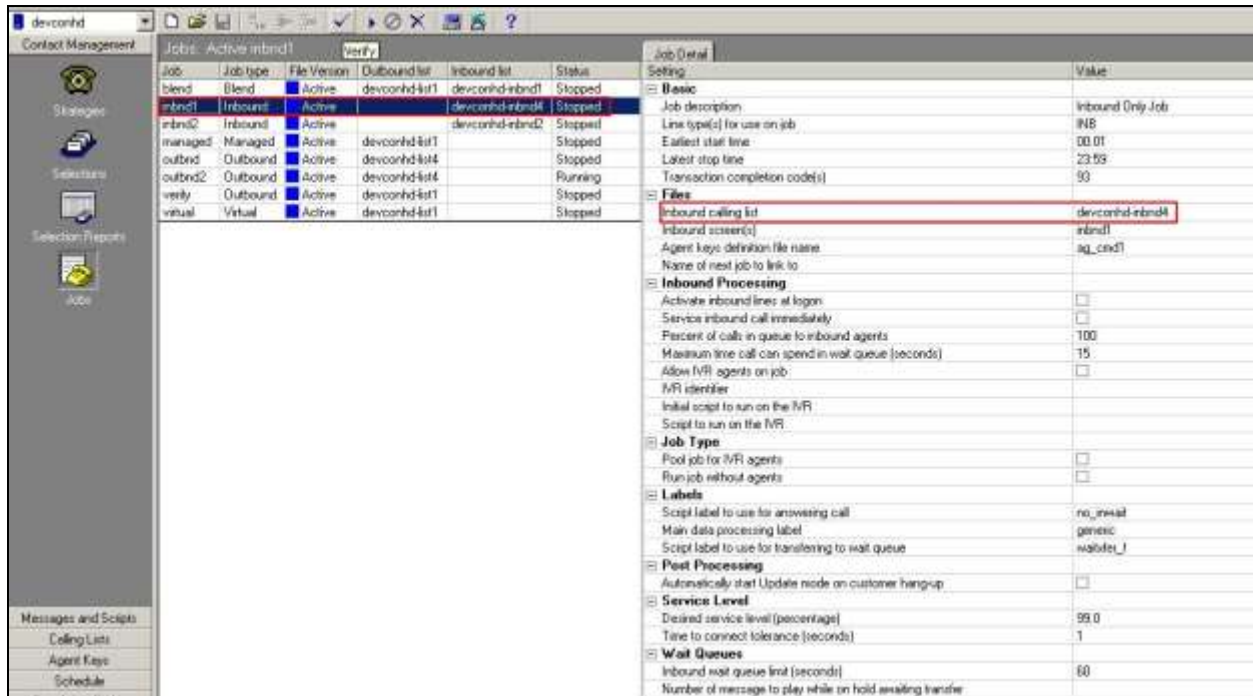
Click run  to start the job.



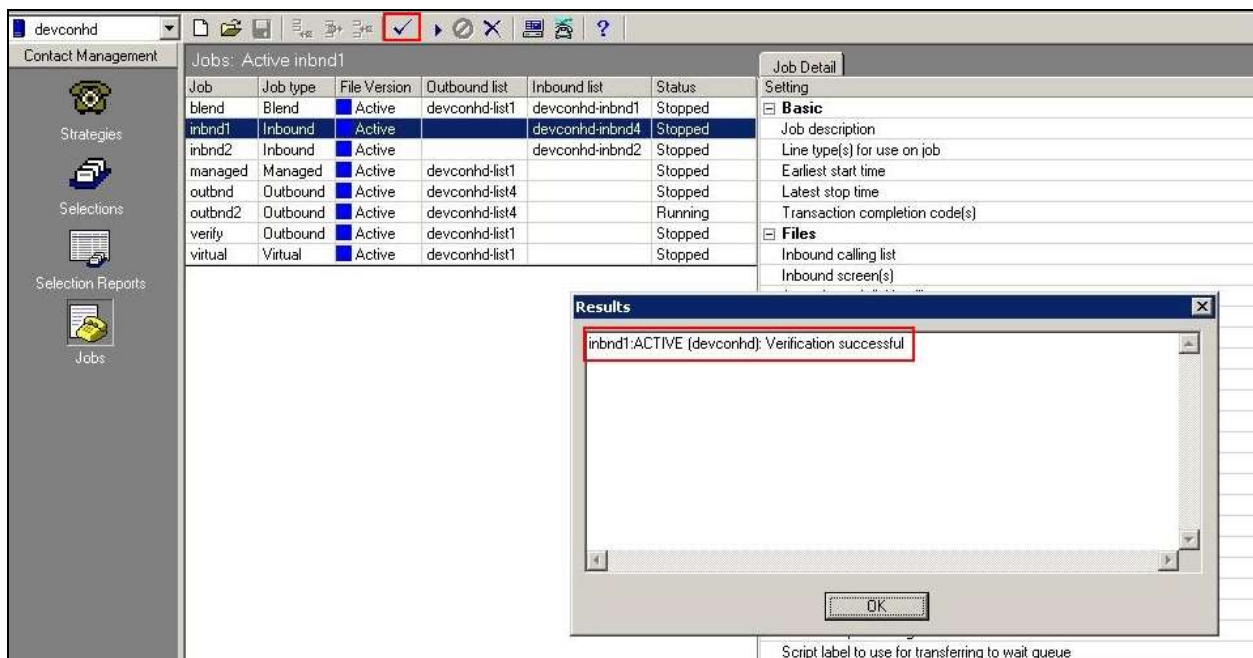
The outbound job is now running, and Proactive Contact will be initiating outbound calls to Proactive Contact Agents, once logged in. In this instance, synTelate Agent is used to log in both the Proactive Contact Agent, and the Communication Manager as an ACD Agent.


7.7.8. Configure Inbound Job

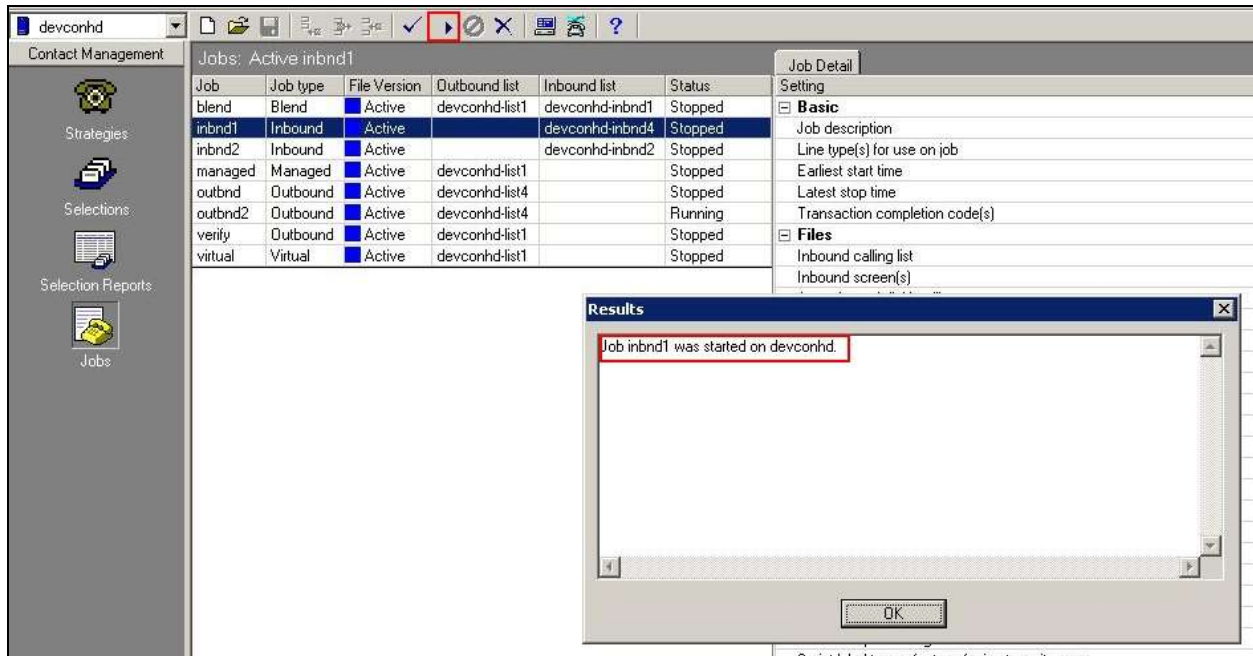
Click **Jobs** in the left pane, select **inbnd4** and set the **inbound calling list** field as configured in **Section 7.7.4**.



Click verify  and ensure verification completes successfully.



Click  to start the job.



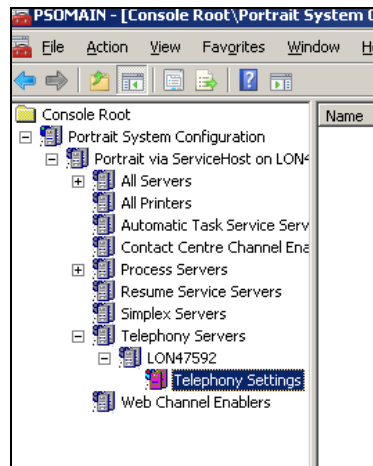
If the job fails to run as expected, ensure the job file within the **/opt/avaya/pds/job/** directory has the following parameters set.

TESTMODE::
TESTOPER::

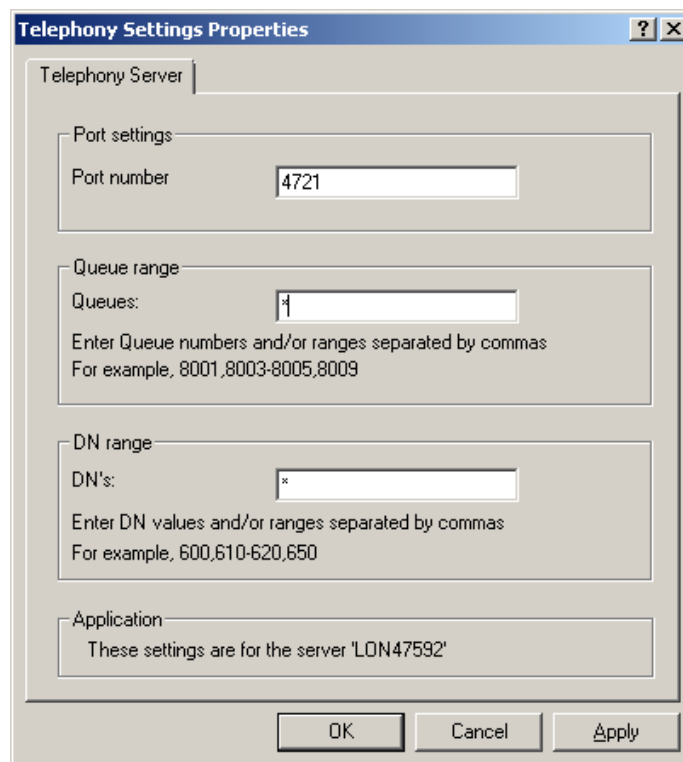
8. Configure Aperio

8.1. Configure telephony server

From the windows start menu run Portrait management console and create a new telephony server whose name is the server name of the AES.



The Properties of Telephony Settings should be set as below



Note: If the Portrait MMC does not resolve the server name (or IP address) being added as the telephony server it will refuse to allow the server to be added.

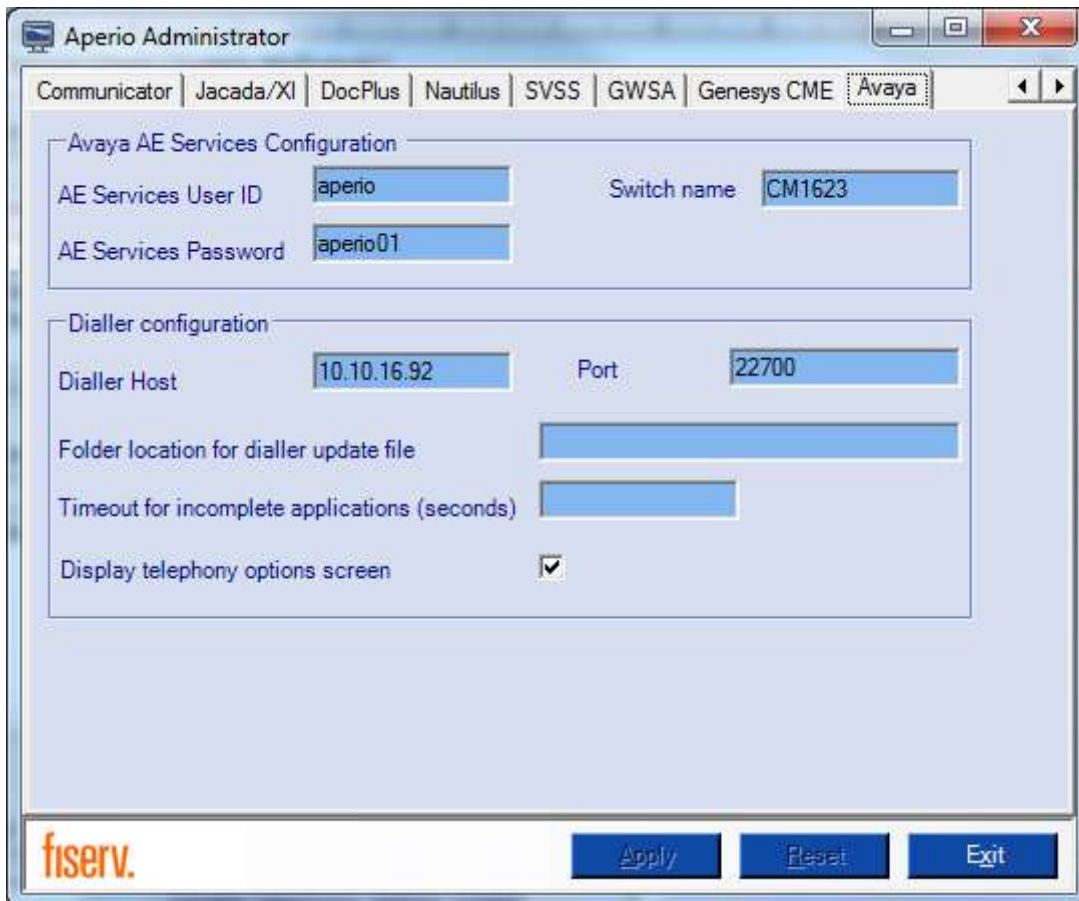
8.1.1. Manually Add Telephony Server

Create a telephony server whose name is the name of the local server and set up all other settings as above. Go to the Aperio database and update the relevant tables directly in order to add the AES server as a new telephony server. The following script will create and update the necessary tables, and can be modified beforehand so that the names of the new and configured telephony server are correctly set as indicated by the comments in the script.



8.2. Configure Aperio Administrator

Configure the **AE Services User ID**, **AE Services Password** and **Switch name** administered in **Section 6** and **Dialler Host**, **Port**, and **Display telephony options screen** into Aperio Administrator.



8.3. Configure Agent in Agent Manager

Each agent will need to be configured in Agent Manager with **Extension number**, **Telephony ID** and **Telephony queue**. Entries are set as follows

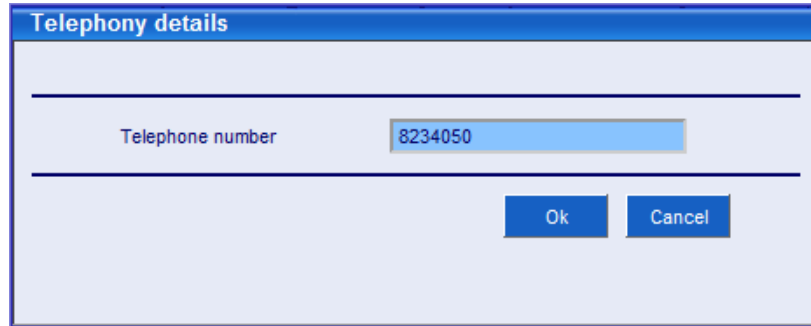
- **Extension number:** The extension of the phone used by the agent.
- **Telephony ID:** The agent ID as configured in CM for the agent.
- **Telephony password:** The password for the agent ID as configured in CM.
- **Telephony queue:** The hunt group number that the agent will log on to as configured in CM.
- **Auto dialer user ID:** The agent ID as configured in Proactive Contact for the agent.
- **Auto dialer password:** The password as configured in Proactive Contact for the agent.

Telephony user details	
Telephone number	02088333003
Extension number	8230001
Auto Answer	<input type="checkbox"/>
Telephony ID	8231001
Telephony log-on status	Logged out Reset
Telephony password	
Telephony queue	1
Auto dialer user ID	agent1
Auto dialer password	agent01

OK Cancel

8.4. Configure Teams in Agent Manager

In Agent Manager configure the telephony details for individual teams. The telephone number for the team is set to the VDN associated with the hunt group as defined in **Section 5.2**.



The image shows a dialog box titled "Telephony details". It has a light blue header bar with the title in white. Below the header, there is a horizontal line. Underneath the line, the text "Telephone number" is displayed on the left, and a text input field containing the number "8234050" is on the right. Another horizontal line is below the input field. At the bottom right of the dialog, there are two buttons: "Ok" and "Cancel".

9. Verification Steps

This section provides the steps that can be taken to verify correct configuration of the Avaya solution and Aperio server.

9.1. Verify Avaya Aura® Communication Manager CTI Service State

The following steps can validate that the communication between Communication Manager and AES is functioning correctly. Check the AESVCS link status by using the command **status aesvcs cti-link**. Verify the **Service State** of the CTI link is **established**.

```
status aesvcs cti-link
```

AE SERVICES CTI LINK STATUS						
CTI Link	Version	Mnt Busy	AE Services Server	Service State	Msgs Sent	Msgs Rcvd
1	4	no	aes63vmpg	established	18	18

9.2. Verify TSAPI Link

On the AES Management Console verify the status of the TSAPI link by selecting **Status** → **Status and Control** → **TSAPI Service Summary** to display the **TSAPI Link Details** screen. Verify the status of the TSAPI link by checking that the **Status** is **Talking** and the **State** is **Online**.

AVAYA Application Enablement Services Management Console

Welcome! User: cmsh
Last login: Thu Feb 20 11:01:32 2014 from 193.168.10.223
Number of prior failed login attempts: 33
HostName/IP: AES63VMPG
Server Offer Type: VIRTUAL_APPLIANCE_ON_VMWARE
SW Version: 6.3.0.0.213-0
Server Date and Time: Thu Feb 20 11:04:02 UTC 2014

Status | Status and Control | TSAPI Service Summary

TSAPI Link Details

☐ Enable page refresh every 60 seconds

Link	Switch Name	Switch CTI Link ID	Status	Since	State	Switch Version	Associations	Msgs to Switch	Msgs from Switch	Msgs Period
1	CH63vmpg	1	Talking	Tue Feb 18 11:21:49 2014	Online	16	5	15	15	30

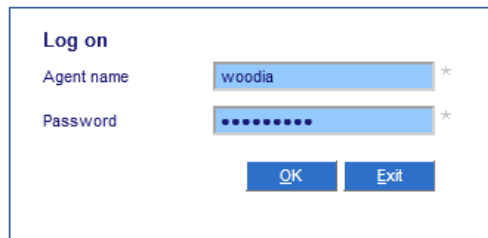
Online Offline

For service-wide information, choose one of the following:
TSAPI Service Status Link Status User Status

9.3. Aperio connection

Start Aperio client and enter **Agent name** and **Password** as configured in Agent Manager. Note, this is the user ID and password for Communicator / Signer. Press **OK** to validate Agent Name and Password.

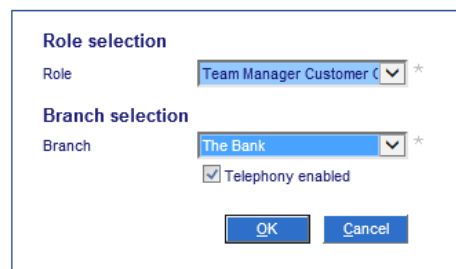
Aperio



The 'Log on' dialog box in the Aperio client. It contains two input fields: 'Agent name' with the value 'woodia' and 'Password' with masked characters. Both fields have an asterisk (*) to the right. At the bottom are 'OK' and 'Exit' buttons.

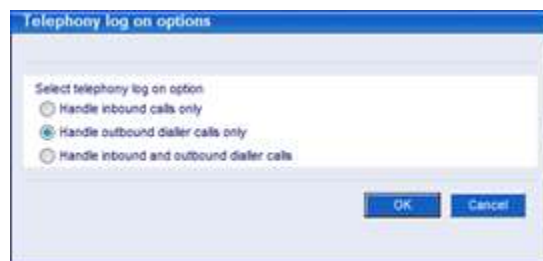
Choose a role and branch for the agent and ensure that the “**Telephony enabled**” checkbox is ticked. Press **OK**.

Aperio



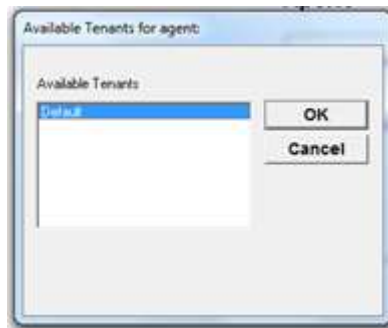
The 'Role selection' dialog box in the Aperio client. It contains two dropdown menus: 'Role' with the value 'Team Manager Customer C' and 'Branch' with the value 'The Bank'. Both dropdowns have an asterisk (*) to the right. Below the dropdowns is a checkbox labeled 'Telephony enabled' which is checked. At the bottom are 'OK' and 'Cancel' buttons.

Select handle outbound dialler calls only. Press **OK**.

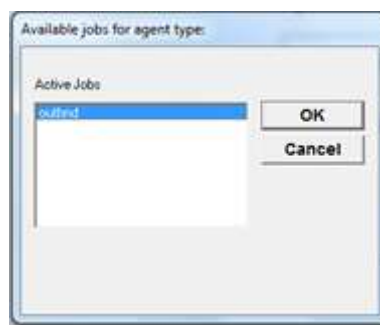


The 'Telephony log on options' dialog box. It contains a section titled 'Select telephony log on option' with three radio button options: 'Handle inbound calls only', 'Handle outbound dialler calls only' (which is selected), and 'Handle inbound and outbound dialler calls'. At the bottom are 'OK' and 'Cancel' buttons.

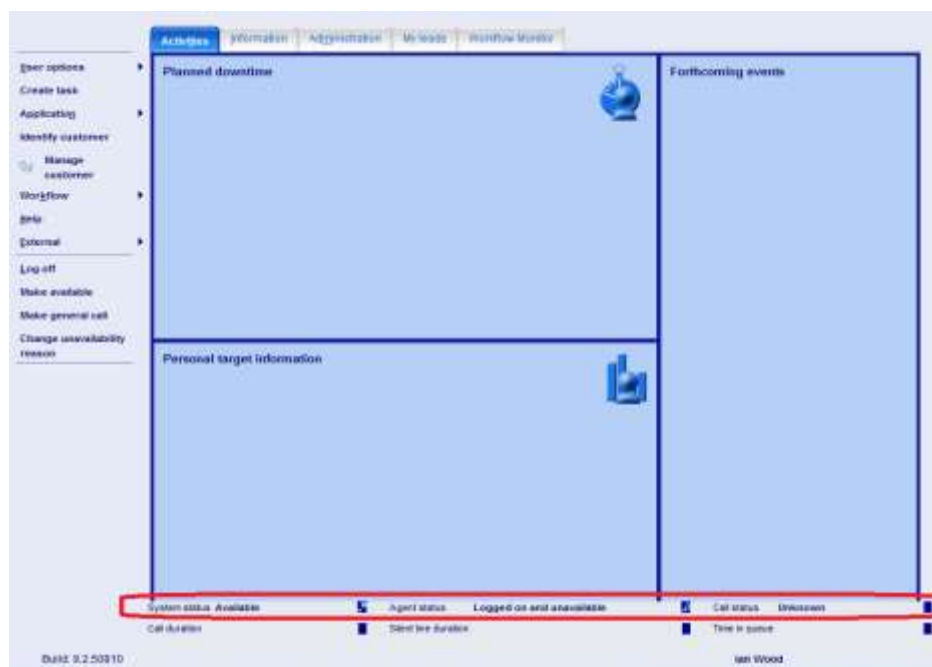
Select tenant for agent. Press **OK**.



Select an available job for the agent. Press **OK**.



The agent desktop will be displayed. The telephony bar at the bottom of the screen will show the initial status of telephony. **System status** will be **Available** and **Agent status** will be **Logged on and unavailable**.



10. Conclusion

These Application Notes describe the configuration steps required for Fiserv Aperio to successfully interoperate with Avaya Aura® Avaya Aura® Communication Manager R7.0 and Avaya Aura® Application Enablement Services R7.0. All feature functionality and serviceability test cases were completed successfully with observations noted in **Section 2.2**.

11. Additional References

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

Product documentation for Avaya products may be found at <http://support.avaya.com>

- [1] *Administering Avaya Aura® Communication Manager*, Document ID 03-300509.
- [2] *Avaya Aura® Communication Manager Feature Description and Implementation*, Document ID 555-245-205.
- [3] *Avaya Aura® Application Enablement Services Administration and Maintenance Guide Release 7.0*.

Technical documentation can be obtained for fiserv Aperio by contacting Fiserv and / or consulting the following Portrait base documents.

- [1] *Integrating telephony*, Edition 7.1.
- [2] *New Feature Overview*, Edition 1.0.
- [3] *Telephony Client Integration Developers Guide*, Edition 1.0.

Appendix

Avaya 9608 H323 Deskphone

This is a printout of the Avaya 9608 H323 Deskphone used during compliance testing.

display station 2016		Page	1 of	5
STATION				
Extension: 2016	Lock Messages? n	BCC: M		
Type: 9608	Security Code: *	TN: 1		
Port: S00102	Coverage Path 1:	COR: 1		
Name: CCT Agent2	Coverage Path 2:	COS: 1		
	Hunt-to Station:	Tests? y		
STATION OPTIONS				
Location:	Time of Day Lock Table:			
Loss Group: 19	Personalized Ringing Pattern: 1			
	Message Lamp Ext: 2016			
Speakerphone: 2-way	Mute Button Enabled? y			
Display Language: english	Button Modules: 0			
Survivable GK Node Name:				
Survivable COR: internal	Media Complex Ext:			
Survivable Trunk Dest? y	IP SoftPhone? y			
	IP Video Softphone? y			
	Short/Prefixed Registration Allowed: default			
	Customizable Labels? y			

Page 2

display station 2016		Page 2 of 5	
		STATION	
FEATURE OPTIONS			
LWC Reception: spe		Auto Select Any Idle Appearance? n	
LWC Activation? y		Coverage Msg Retrieval? y	
LWC Log External Calls? n		Auto Answer: none	
CDR Privacy? n		Data Restriction? n	
Redirect Notification? y		Idle Appearance Preference? n	
Per Button Ring Control? n		Bridged Idle Line Preference? n	
Bridged Call Alerting? n		Restrict Last Appearance? y	
Active Station Ringing: single			
		EMU Login Allowed? n	
H.320 Conversion? n	Per Station CPN - Send Calling Number?		
Service Link Mode: as-needed		EC500 State: disabled	
Multimedia Mode: enhanced		Audible Message Waiting? n	
MWI Served User Type:		Display Client Redirection? n	
AUDIX Name:		Select Last Used Appearance? n	
		Coverage After Forwarding? s	
		Multimedia Early Answer? n	
Remote Softphone Emergency Calls: as-on-local	Direct IP-IP Audio Connections? y		
Emergency Location Ext: 2016	Always Use? n IP Audio Hairpinning? n		

Page 3

display station 2016	STATION	Page 3 of 5
Conf/Trans on Primary Appearance? n		
Bridged Appearance Origination Restriction? n	Offline Call Logging? y	
Require Mutual Authentication if TLS? n		
Call Appearance Display Format: disp-param-default		
IP Phone Group ID:		
Enhanced Callr-Info Display for 1-Line Phones? n		
ENHANCED CALL FORWARDING		
	Forwarded Destination	Active
Unconditional For Internal Calls To:		n
External Calls To:		n
Busy For Internal Calls To:		n
External Calls To:		n
No Reply For Internal Calls To:		n
External Calls To:		n
SAC/CF Override: n		

Page 4

display station 2016	STATION	Page 4 of 5
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: ec500	Timer? n
2: call-appr	6: extnd-call	
3: call-appr	7:	
4: call-park	8:	
voice-mail		

©2016 Avaya Inc. All Rights Reserved.

Avaya and the Avaya Logo are trademarks of Avaya Inc. All trademarks identified by ® and ™ are registered trademarks or trademarks, respectively, of Avaya Inc. All other trademarks are the property of their respective owners. The information provided in these Application Notes is subject to change without notice. The configurations, technical data, and recommendations provided in these Application Notes are believed to be accurate and dependable, but are presented without express or implied warranty. Users are responsible for their application of any products specified in these Application Notes.

Please e-mail any questions or comments pertaining to these Application Notes along with the full title name and filename, located in the lower right corner, directly to the Avaya DevConnect Program at devconnect@avaya.com.