

Avaya Proactive Contact 5.0 Overview

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Chapter 1: What's new in Avaya Proactive Contact 5.0

Real-Time Record Selection Support

In the prior releases of Proactive Contact, the only Record Selection "criteria" that could be changed during a running Proactive Contact Job was the ability to turn Time Zones on or off. The Time Zone feature was designed to help customers implement a "follow-the-sun" strategy. Proactive Contact 5.0 provides the ability to change the Selection Criteria while a Job is running without the requirement to stop and restart the Job. For example, a Job could be running that is targeting 30 day and 60 day delinquent accounts. Midway through the Job the criteria could be modified on the fly to focus on 60 day accounts only.

Automatic Record Selection for Job Linking

This feature enhancement allows users to set up a long "chain" of linked Jobs. In prior versions of Proactive Contact, the user had to monitor the current campaign and run the Record Selection for the linked Job just prior to the completion of the current Job. In this release of Proactive Contact, the users are provided with controls that allow them to have the Record Selections on Linked Jobs run automatically right at the end of the current Job. This eliminates the time spent on monitoring the end time of the first Job as well as each subsequent job. Additionally, by running the Record Selection just before the linked Job starts, ensures that there is no overlap between records selected in the first job and the records to be called in the linked Job(s).

Unit Work List Job Compatibility with Infinite Lists

Proactive Contact 5.0 adds the ability to Unit Work List Jobs to run using an Infinite List. This allows users to feed records into Unit Work List Jobs in near real-time. The Unit Work List Job processing then places new calls based on priority and routes them to agents who have joined the Unit ID associated with those records. This enables new high priority records to be called

before other records and to have them handled by agents based on the specific skills of the agents.

Multi-Unit Selection for Unit Work List Jobs

Currently, users of Proactive Contact 4.x or earlier are limited to two choices when using Unit Work List Jobs. Upon joining a Unit Work List Job, agents can either log into one Unit ID or all Unit IDs. For example:

- A customer has agents that speak up to 3 languages but some of their agents only speak one and a few speak only two. When joining a Unit Work List Job the agents that speak one language select the unit for their one language and the agents that speak all three simply choose the All Unit IDs option. However, the agents that speak two of the three languages can not pick their two specific languages.
- Proactive Contact 5.0 provides the option for any agent to "multi-select" from the master list of all Unit IDs. In the example above there would be three unit IDs, one for each language. The agents that speak two languages can now pick their two specific languages from the pick list.

This enhancement to Unit Work List Jobs reduces the need for agents to join multiple Jobs. Users can now set up Jobs that span many skills (indicated by various units) and then have agents only receive live voice connects that match their specific skill set/unit(s).

Virtual Job "Opt-Out" Option

In the prior version of Proactive Contact, the Virtual Job feature was limited to the playing of a message. After playing the message the system would hang-up with no other options allowed for the customer.

In this release of Proactive Contact customers have the ability to "opt-out" of the virtual message by pressing a digit on their phone. Options include opting out to an Intelligent Call Blend Job (or pure Inbound Job) on Proactive Contact or to a VDN within the Inbound Call Center, thus providing the customers options that will allow them to talk to a live agent.

The Proactive Contact CTI system also supports this function but only uses the opt-out to VDN option.

Blend Enhancements

Agent Blend Support for Avaya Aura[®] Contact Center (AACC)

This release of Proactive Contact provides Agent Blend capabilities with the legacy CS 1000 switch and the Avaya Communication Manager Medium Size Business Template (MBT) configuration.

Proactive Contact uses the Contact Management Framework (CMF) web services interface available in AACC as the integration point to the CS 1000 and MBT systems. CMF is a SOAPbased web services API that provides Proactive Contact access to Controlled Directory Number (CDN) and agent events to achieve Agent Blending. Once this integration is in place, the Agent Blend feature in Proactive Contact works exactly as it would with any other switch, for example Communication Manager.

😵 Note:

When CS 1000 switch is integrated with AACC over Application Module Link (AML), Proactive Contact Agent will use ACD ID as a phone extension. ACD ID is configured in CS 1000 which is associated with phone extension.

Supported Configuration:

- Proactive Contact with PG230 and CS 1000 connected to Proactive Contact through AACC's Contact Management Framework using AML.
- Proactive Contact with PG230 and CS 1000 connected to Proactive Contact through AACC's Contact Management Framework using SIP.
- Proactive Contact with PG230 and MBT connected to Proactive Contact using AACC's Contact Management Framework and SIP.

Software Requirements:

- AACC 6.1 SP2 or higher and Proactive Contact 5.0
- AACC 6.1 and Proactive Contact 5.0
- Earlier versions of Nortel environments such as CC7 are not supported and therefore must be upgraded to AACC 6.1 SP2 or higher.

Simultaneous Agent and Call Blending

Proactive Contact 5.0 includes support to run Intelligent Call Blending and Agent Blend on the same system at the same time. This can be especially useful for customers using a single

system for multiple departments, for example, a company with one department doing Collections and another one doing Teleservicing on a single system.

With Proactive Contact 5.0 the Collections department can use Intelligent Call Blending while the Teleservicing department uses Agent Blend for their Jobs.

Internet Monitor Enhancements

Extensive enhancements have been made to Internet Monitor. Proactive Contact 5.0 Internet Monitor can now retrieve data from the system's Oracle database. This enhancement also allows additional data to be displayed within the application. Hyperlinks from one view to another have been added along with support for tabular and graphical views of each screen. The application has been modernized using a look and feel similar to Avaya IQ and using the icons that the users are familiar with from Proactive Contact Monitor application.

Internet Monitor now includes an option to install and support the required Web Server on the Proactive Contact server. This option allows users to deploy the application entirely on Proactive Contact and simply provide users with appropriate web link for reporting. Note that this option does not preclude users from deploying the application using their own Web Server.

Running Real-time Scheduling

In the prior versions of Proactive Contact, all scheduled tasks created, deleted, or changed using the Editor interface were not executed until after a system restart. In some cases, this caused unnecessary inconvenience for users. For example, a Job was scheduled to start at 9:00 AM and at 8:30 AM a supervisor deletes the scheduled item using Editor. In order for the Job to not start at 9:00 AM a system restart was required.

Proactive Contact 5.0 provides the option for users to create, modify, or delete scheduled items and have them executed without a system restart.

Extend Agent Joblist Functionality to Agent API and Proactive Contact Agent

Prior versions of Proactive Contact support restricting the Jobs that agents can join using a feature called Agent Joblist. However, the Joblist feature is only available when using the character-based agent application. This feature enhancement in Proactive Contact 5.0

extends the Joblist functionality into the GUI based PC Agent application and into the Proactive Contact Agent API.

Enhanced Cell Phone Detection

Cell phone Call Progress Analysis (CPA) offers a unique set of challenges relative to land lines. Differentiating between voice mail and a live voice is more challenging since cell phone companies' voice mail systems tend to have many pauses in the greeting. For example: "You have reached the voice mailbox for" (pause) "John Doe" (pause) "Please leave your message after the tone". Or, "You have reached" (pause) "4-2-4-5-6-7-8-9-9-9" (pause) "Please leave a message after the tone".

The pause in the first 3 seconds is often detected incorrectly as a live voice because it sounds very much like "hello" (pause). This results in automated voice calls being passed as live voice calls to agents.

In this release, the Enhanced Cell Phone Detection enables users to adjust the sensitivity of the CPA to address this issue. The past design of the dialer allows someone who answers the phone with "Hello, this is John" (for example) to be detected as a live voice. This allows business calls that are answered by a receptionist to be correctly classified as a live voice. However, for campaigns that are dialing cell phones, most people still simply answer "hello". A timer has been added to the Job which allows the supervisor to tell the system how long to "listen" (1, 2 or 3 seconds) before determining if the call is a live voice or an answer machine. For cell phone jobs, it is better to set this value to 1 or 2 seconds for more accurate detection.

Impact:

This enhancement allows customers to tune the CPA algorithm at the Job level. For cell phone oriented Jobs, a lower setting helps catch simple "hello" as a live voice while anything longer is categorized as an automated voice. For business Jobs a traditional higher setting allows longer greetings to be detected correctly as a live voice.

Automatic Agent Set Recall for Completed Jobs

This enhancement allows agents to automatically receive recalls scheduled in one Job while they are participating in another Job. This improves agent productivity by allowing all agents to move from one Job to another as the net-new calls on the original Job are depleted. In turn, this improves campaign effectiveness by ensuring that valuable agent set recalls are placed at the customer requested time.

Enhanced SNMP Support

Proactive Contact 5.0 continues to build on the system's Management Information Base (MIB) which was introduced in Proactive Contact 4.x. In addition to the full suite of PG230 switch traps/alarms added in Proactive Contact 4.1.2 (including port, card, memory, communication and other items necessary to monitor the health of the switch), Proactive Contact 5.0 has several new traps/alarms aimed at alerting management to agent issues, licensing problems, and required maintenance routines.

Proactive Contact 5.0 alarms are exposed to third–party tools through the SNMP GET/WALK standard. Network Management Systems are integrated to Proactive Contact 5.0 using the system's NET-SNMP daemon. All unique alarm identifications have a corresponding Object Identifiers Registry (OID) in the revised version of the Proactive Contact 5.0 MIB.

Strengthened Password Support

In this release, the password security has been enhanced based on the following criteria:

- Password encryption algorithm: SSHA (LDAP only)
- Password Composition
 - a. Minimum password length: 8 characters
 - b. Passwords should include any three of the following:
 - One upper case letter
 - One lower case letter
 - One number
 - One special character
- Password history: 7 passwords
- Account lockout threshold setting: Lockout after 3 attempts

This option can be configured as On/Off. When it is configured as on, anytime a new user is created or a user resets his/her password, the newly created password must match the enhanced password security criteria described above.

Automated Agent Monitoring Transition

Within the Monitor application of Proactive Contact 4.x and earlier versions, Supervisors can actively monitor an agent's conversation. However, when the Supervisor wants to switch to

Monitoring another agent the system "tears down" their first connection and reestablishes another connection with the new agent. This costs the Supervisor valuable time waiting for the process to take place. Proactive Contact 5.0 eliminates this time consuming process by allowing Supervisors to immediately switch between agents.

Simultaneous Campaign Alert

This alert warns users that they are about to exceed the maximum number of simultaneous running Jobs allowed on the system. This prevents them from overwriting other Jobs that were started earlier.

Hardware and Software Updates

The following are the hardware and software updates in this release of Proactive Contact:

- Avaya Proactive Contact Server
 - Operating System updated to Redhat Linux 5.5
 - Updated with Java 1.6 components
 - New HP ProLiant DL360 G7 Common Server
- Avaya Proactive Contact Supervisor Suite
 - Supported on Windows 2008 server and Windows 7 Enterprise
 - Supported on 64-bit version of Windows 7 Enterprise and Windows XP
- Avaya Proactive Contact APIs
 - Now supported on Windows 2008 server and Windows 7 client

Administrative Improvements

Send system reports using the Simple Mail

This enhancement adds the Linux "sendmail" RPM and associated third-party package dependencies to the standard Transfer Protocol (SMTP) Proactive Contact software installation. This allows Avaya Customer Support to quickly E-mail troubleshooting logs and/or reports to key subject matter experts which in turn leads to faster resolution of system issues.

Isolate code into components for faster troubleshooting	This enhancement is designed to lower the amount of time it takes for the customer support to troubleshoot and fix system issues.
Upgrade agents and supervisors in release blocks	This enhancement allows the Proactive Contact server software to be upgraded without the time consuming process of updating the system's Supervisor Suite or the Proactive Contact Agent application. For example, the Proactive Contact 5.0 agent and supervisor applications will work with the 5.0.2 or 5.0.3 Proactive Contact server versions. This enhancement only applies to Proactive Contact 5.0 and is not backwards compatible to any previous version.
Configuration simplification tools for PODs, Agent Blend, and Time Zones	The implementation team uses these tools to insure configuration accuracy and consistent implementation of each of these features. In turn, implementation and testing cycles are shortened, human error is minimized, and the total time to live production is reduced.
Exclude Public/Public directory from configuration backup	This enhancement eliminates the time and effort to remove these files to a temporary location when performing a backup and therefore reduces the total time it takes to complete the backup process.

Proactive Contact PG230 IP Card

The new IP card supports h.323 connections from the public network and all forms of connections between Proactive Contact and other switches such as Communication Manager. This includes connections for Agents, Inbound Lines for Intelligent Call Blending, and Transfers.

😵 Note:

Although atypical, IP lines from the public network could terminate in another switch such as CM and then be "passed through" to Proactive Contact.

New PG230RM systems support 96 IP ports per card up to a total of 14 cards for a total port capacity of 1,344. Older PG230RM systems require a power supply upgrade to support a full load of 14 IP cards. PG230RM systems that have not had the power supply upgrade support a maximum of 6 IP cards for a total IP port capacity of 576.

Non-PG230RM systems (for example, Large Cabinet systems) cannot have their power supplies upgraded. These systems support a maximum of 6 IP cards for a total IP port capacity of 576.

Chapter 2: Proactive Contact Overview

About Avaya Proactive Contact

The Proactive Contact solution is a suite of hardware and software that enables proactive and opportunistic management of customer relationships within a contact center.

Proactive Contact provides superior outbound and blended solutions for next generation of contact centers. Proactive Contact is available in two versions, the hard dialer, rack-mounted solution and the soft dialer or Computer Telephony Integration (CTI) version.

This solution helps you reach your customers at the lowest possible cost per call, whether a calling mission requires inbound, outbound, or blended solution. Proactive Contact provides a robust, proven, and secure technology to meet the demands of a business. With one of the most accurate call detection capabilities and a superior calling capacity in the industry, Proactive Contact provides the maximum number of live customer connects. In addition, a superior call pacing algorithm ensures the automatic control of service levels, which increases agent productivity and results in a significantly higher Return on Investment (ROI) than solutions offered by competitors.

Contact centers face multiple business challenges as identified by Frost and Sullivan. Proactive Contact solution helps businesses meet multiple challenges including:

- Provide better support and services to customers and increase the revenue stream.
- Free the business to focus on its core competencies, become more competitive, and spend less time on contact center IT issues and upgrades.
- Leverage the latest contact center technologies to increase capabilities with minimal capital expense without worrying about obsolete features and functionality.
- Minimize operational cost while increasing agent efficiency.

The Proactive Contact solution helps you to deliver on all of these challenges and additionally, helps you reach your consumers with information they need.

The set of features and technology used in Proactive Contact Systems can help a business gain competitive advantage when successfully integrated with the business processes. Calling lists with advanced customer segmentation, combined with industry leading call classification features and high capacity dialing from the Proactive Contact solution, help a contact center increase revenue and provide better support to the customers. Using these features and technologies, you can also ensure that calls are delivered at the lowest possible cost per call at the highest possible agent efficiency. End-to-end professional service support from Avaya

frees businesses to focus on their core tasks. Well-defined upgrade paths for Proactive Contact solution ensures that contact centers get the latest technologies.

Features

The following table describes the standard features provided with Proactive Contact.

Feature name	Description
Detect the beep	Leaves a message after detecting the last beep on an answering machine. Not available in Proactive Contact with CTI.
Expert calling ratio	Allows supervisors to control the dialing pace of a job.
Cruise Control	Cruise control automatically maintains the service level of outbound dialing during a job and connects the calls to agents within a specified period of time. During the job, you do not have to monitor or modify the call pacing settings.
Agent Blending	Agent Blending integrates outbound calling activities on Proactive Contact with inbound callin activities on your ACD. In an Agent Blending system, ACD agents log in to both Proactive Contact and the ACD. Agent Blending monitors the activity on the ACD. Agent Blending uses this information to determine when to acquire agents for outbound calling and when to release ACD agents to handle inbound calls.
Intelligent Call Blending	Proactive Contact uses Intelligent Call Blending (ICB) as a call blending method for call centers whose main priority is outbound dialing. ICB distributes a blend of inbound and outbound calls to Proactive Contact agents. Usually, the Automatic Call Distributor (ACD) transfers inbound calls to available inbound or blend agents on Proactive Contact. When an agent is unavailable, Proactive Contact places calls in the inbound wait queue. If your system does not use an ACD, Proactive Contact transfers inbound calls to available inbound or blend agents.
Job linking	Identifies jobs that start automatically when the current job is complete. When you link a job, the system transfers agents to the next job as the agents complete their last calls and release the records. The system displays a message telling the agents that they are changing jobs.
Letter generation	Allows supervisors to create a list of customer data, such as names, addresses, and other record information, to develop customized form letters from their calling lists.

Feature name	Description
	Letter Generation extracts the information, which is then exported locally. Once this information is gathered, supervisors can create a mail merge letter using this information.
Line pool	Allows multiple jobs to share common line pools. This line pooling enables Proactive Contact to distribute lines to active jobs.
List distribution	Analyses the records in an outbound calling list and creates reports that count the records in the specified categories (or distributions). List Distribution helps in job planning and analysis.
Managed dialing	Allows agents to preview a customer record before calling that customer.
PC analysis	Creates job, agent, and calling list information used in generating reports.
Record edit	Allows a supervisor to view, edit, or delete customer records on a calling list. The supervisor can specify data to locate the customer record and display it on the Supervisor workstation where the supervisor can view, edit, or delete the record. This feature has two options: Standard Record Edit and Quick Search. By default, both the options are configured on the system unless otherwise requested.
Standard record edit	Searches through a calling list from top to bottom based on the values entered in one or more fields. Standard Record Edit is slower than Quick Search, but it accepts field values that contain special characters, such as hyphens (-) and wildcard characters (*). It also allows searches on multiple fields.
Quick search	Uses the value entered in a single field to locate a record. The system also uses this field to index your calling lists. The value for this field should be unique to each record. Quick Search is a fast retrieval method that is used for large calling lists. It does not accept field values that contain special characters.
Screenbuilder	Allows supervisors to design and modify agent screens.
Ziptones	Indicates the sounds that Proactive Contact transmits to the headset of an agent immediately before connecting that agent with a customer. Use the two ziptones defined during the specification process: one for inbound calls and the other for outbound calls. With a different ziptone for inbound and outbound calls, agents can quickly determine whether they are handling an inbound or an outbound call, by the sound.

Configured features list

The following table describes the features configured and provided with Proactive Contact.

Feature name	Description	
Agent owned recall (AOR)	Allows an agent to set a recall for a customer. The agent who initially set the recall handles the call when the call is placed again.	
ANI/DNIS	Displays Automatic Number Identification (ANI) to indicate the number of the calling party. Also displays Dialed Number Identification Service (DNIS) or the number dialed.	
Autoplay	During a campaign, this option enables Proactive Contact to automatically deliver a message when it detects that an answering machine has picked up the line on the other end.	
Completion codes	Used by the system or an agent to use a code to specify the results. When a customer answers a phone call, Proactive Contact transfers the call to an agent. At the end associated with a completion code. The completion code can be an agent-generated code that is pre-specified or a standard system completion code. If the system does not pass the call to an agent, Proactive Contact generates the completion code. Proactive Contact stores the completion codes and uses these codes to select records for calling and to generate reports. The system identifies completion codes by a code number, call result, and description.	
	• The call result is a short name that makes the code easier for agents to identify.	
	• The description provides call center supervisors with a more concise description.	
	Each system has one set of completion codes. You specify the agent generated codes to use in the specification process.	
Campaign update	Stops outbound calls to customers who have already been in contact with an agent. If the customer calls an inbound agent, the system removes the record from the calling activities of the day. You can configure this feature as Real Time, Batch, or Both.	
Do not call list	Maintains a list of records that Proactive Contact does not call during a job. Agents can mark numbers as Do Not Call (DNC) on request. You can also upload DNC requests to host database for future exclusion. This marking, however, is valid only for a day, if the list is downloaded every day.	

Feature name	Description
File transfer and schedules	Identifies the information that Proactive Contact uses to receive and transfer data to the host. The specification process is where we gather the following information:
	 Time to start the data transfer, even to retry transfers when an attempt fails
	 Time between each transfer attempt
	Time to stop transfer attempts
	Days to conduct the data transfer
	Type of transfer: download from the host to Proactive Contact and upload from Proactive Contact to the host
	Calling lists to process
Infinite job	System appends the records to a calling list during calling activities. These records are automatically added into the active Infinite job campaign.
List processing	Occurs whenever a list is updated. Whenever a download occurs, your system is configured to check the calling lists to update or extract information from the calling lists. During list processing, supervisors can manipulate and update data on the current calling list from a previous list.
Native voice and data transfer	Allows outbound or blend agents to transfer a call and its associated data to an available inbound or blend agent. Not available on Proactive Contact with CTI.
Record specific messaging	Links outbound wait queue messages to selected criteria in the calling list fields. During calling activities, Proactive Contact plays messages specific to zip code, city, account type, or any other specified field in the calling list. During the specification process, you specify the messages that a customer hears while waiting in the outbound wait queue.
Sales verification	Uses a second calling campaign to confirm sales or commitments obtained in a prior campaign. This feature also allows you to choose the keys needed to support a sales job in a sales verification scenario. When Sales Verification is used, agents use a specific code to release records that resulted in a successful sale. These records are automatically sent to a second verification job. In this job, Agent calls up each record and a supervisor verifies that the person at the other end of the line agrees to the sale.
System wait queue messages	Provides the messages that customers hear while waiting for an agent or when they call after business hours.

Feature name	Description	
	You can also create messages and assign them to agent keys. When an agent presses the agent key, Proactive Contact plays the assigned messages. System wait queue messages are commonly strung together to create a script. When creating system wait queue messages, create individual messages, and then assign one or more of the messages to a message script. Also indicates the time (in seconds) Proactive Contact pauses between messages. The following example is a sample message script:	
	1. "Hold the line. I have a call for this number."	
	2. Pause for 5 seconds	
	3. "Sorry to keep you waiting. I'm still trying to connect."	
	4. Pause for 5 seconds.	
	5. "Still trying to connect, continue to hold."	
	6. Pause for 5 seconds.	
	 "Thank you for waiting. Sorry I could not connect you. Try again later." 	
	8. Proactive Contact disconnects the line.	
Virtual agent	Part of an agentless job. Its sole function is to deliver outbound messages to customers.	
Wait queues	A holding area for calls the system cannot pass immediately to agents. Customers often hear system messages while waiting in a wait queue.	
Wait queue indicators	A message that appears on the screen of an agent when Proactive Contact passes a call from the wait queue to the agent. Wait queue indicators can show the amount of time that the customer waited for the agent. Wait queue indicators can also show a brief message that the agent reads to the customer. Base each indicator on how long customers waited for an agent. An agent screen can display up to four wait queue indicators in one set.	

Hardware components

The following table lists the hardware components required for each implementation option and mentions the party responsible for providing the component:

Component	Avaya Proactive Contact with PG230RM	Avaya Proactive Contact with CTI
Server Rack Cabinet	Avaya	Avaya
Digital switch	Avaya	Not applicable
System Controller (CPU)	Avaya or Avaya customer	Avaya or Avaya customer
Maintenance Modem	Avaya ¹	Avaya ¹
Administrator console	Avaya customer	Avaya customer
Console/Remote Access Server	Avaya or Avaya customer	Avaya or Avaya customer
Agent workstation	Avaya customer	Avaya customer
Supervisor workstation	Avaya customer	Avaya customer
Printers	Avaya customer	Avaya customer
Uninterruptible power supply (UPS)	Avaya customer	Avaya customer
Digital data storage (DDS) Tape device	Avaya or Avaya customer	Avaya or Avaya customer
Ethernet Network Interface	Avaya or Avaya customer	Not applicable

- 1. Maintenance modems are included in the United States and Canada. Elsewhere, the maintenance modem must be provided by the Avaya customer or an Avaya Partner.
- 2. Optional

Supported platforms

The supported platforms require the following browsers, databases, and operating systems. For the latest list of supported platforms, see the Avaya Support Web site at http://www.avaya.com/support. All the listed platforms support Proactive Contact and its full set of features.

Component	Supported platform
Proactive Contact Server	Hewlett-Packard ProLiant DL360 G7 server
	 Hewlett-Packard Proliant DL385 server (G2 and G5 server)
	 IBM Nextgen 3650 M2 server (also known as S8800 server)
Proactive Contact Operating System	Redhat Enterprise Server (RHEL ES 5.5)
Database	Oracle 10g 32-bit (10.2.0.5.0)
Runtime Software	Crystal Reports 8.5 Service Pack 3
Supervisor Operating System	Microsoft Windows XP Service Pack 2 (32-bit or 64- bit Operating System) Microsoft Windows Vista Enterprise Edition (32-bit or 64-bit Operating System) Microsoft Windows 7 Enterprise Edition (32-bit or 64- bit Operating System) Microsoft Windows Server 2008 SP2 Enterprise version (32-bit or 64-bit Operating System)
Agent Desktop Operating System	Microsoft Windows XP Service Pack 2 (32-bit or 64- bit Operating System) Microsoft Windows Vista Enterprise Edition (32-bit or 64-bit Operating System) Microsoft Windows 7 Enterprise Edition (32-bit or 64- bit Operating System) Microsoft Windows Server 2008 SP2 Enterprise version (32-bit or 64-bit Operating System)
Internet Monitor	Microsoft Internet Explorer 6.0 Service Pack 1, 7.0, 8.0 Mozilla Firefox 2.x and 3.x
СТІ	Avaya Application Enablement Services (AE Services) 4.2 and above.
	Note: For AES 4.2.1 and above, the CTI link for communicating with Avaya Proactive Contact should be selected as secured. Avaya Aura [®] Contact Center 6.0 SP3 or 6.1
Digital Switches	Avaya: PG230RM CS 1000 (connected to Proactive Contact using AACC's Contact Management Framework)
Switch	Communication Manager 5.2.1 and 6.0

Agent screens

Using Proactive Contact, Agents can view and save customer information and record call results on the Agent screen. The system saves the information entered on the Agent screen for future retrieval.

During the specification process for creating new Agent screens, design one or more characterbased screens for outbound calls and for inbound calls, if necessary. Each character-based screen can contain up to 78 characters on a line and 23 lines of text that consist of data fields. Use **Screenbuilder** to add and modify character-based screens.

If your agent workstations run on Windows, and you want to create customized Agent screens, you must purchase the optional Agent API (Application Programming Interface) software. You also need application development software for Visual Basic or C++ application development.

Inbound agent screens can also display the ANI and DNIS fields.

Configure agent applications

During the specification process, an Avaya representative works with your company to configure some of the Proactive Contact features for your call center.

This section describes Proactive Contact features that can be configured specifically for a call center.

Agent Keys

Agents use function keys to record call results and release phone lines. Agents can also use function keys to start actions such as:

- Playing a recorded message for a customer
- Logging off the job
- Switching between the screens

You can specify Agent keys as function keys, key combinations, or other programmable keys. You can design one key set for all applications or multiple key sets. During the specification process, define agent keys for the following functions and call completion codes:

- Standard functions (such as Get Record and Set Recall)
- Standard call completion codes (such as NOANSWER)
- Optional company-defined call completion codes (such as Left Message and Promise to Pay)

The following table describes the standard agent key functions:

Function	Description
Release record	Releases the current record and request for a new record.
Set Recall	Schedules a callback at a specific time.
Manual Hangup	Hangs up the call without releasing the line so the agent can place a manual call. Not available in Proactive Contact with CTI.
Manual Call	Places a manual call. This feature prompts the agent for a phone number. Not available inProactive Contact with CTI.
Field Call	Calls the number that appears in a record field. Not available in Proactive Contact with CTI.
Transfer Call	Transfers a call to another phone number. Not available in Proactive Contact with CTI.
Dial Ahead	Calls the customer shown on the screen. Enabled through the Managed Dialing user feature.
Logout	Requests to stop working in the current job.
Ear volume	Controls the volume in the ear piece of the headset. Because this function is available on the extension headset of the agent, therefore, it is not applicable to Proactive Contact with CTI.
Mouth volume	Controls the volume in the mouthpiece of the headset. Because this function is available on the extension headset of the agent, therefore, it is not applicable to Proactive Contact with CTI.
Go To	Moves between multiple screens.

Inbound screens

Proactive Contact with PG230 option come with inbound screens. Proactive Contact with CTI does not include Inbound screens.

Systems that use the Intelligent Call Blending solution include inbound screens. Systems that use Agent Blending do not include these screens.

On an inbound job, an agent can view an inbound screen. The agent then toggles to the host screen to update the customer information. Once the call is completed, the agent can use Campaign Update to update the outbound calling list. The agent uses the Cut Account Number function key to copy and paste the account number to the Proactive Contact agent screen and then releases the inbound record. The system searches for the account number in the outbound calling list and marks the customer record as Do Not Call (uncallable).

Outbound screens

The Proactive Contact Agent desktop application provides a user friendly interface to the Proactive Contact system. It displays the data as defined using Screenbuilder and the agent keys selected for use during the campaign. Using the Agent desktop, agents can access common functions on the system, including logging on and logging off Proactive Contact, transferring calls, and setting recalls.

The standard Agent desktop does not provide an automated lookup to the host system or source account. If required, Avaya Professional Services can develop custom screen options for a fee to provide a host lookup or a common desktop to multiple applications including other Avaya products.

Internet Monitor

You can use Proactive Contact Internet Monitor to monitor job and agent activities on the system. It is a read-only interface. You can view the information from a network computer using a Web browser, such as Mozilla Firefox 2.x / 3.x or Microsoft Internet Explore 6.0 SP2 or later.

Middle-tier applications

Middle-tier applications are components that provide different types of data services to the Supervisor applications. These data services relate to the following:

- Historical reporting
- Exception/Alerts monitoring
- Command and control services integration for Supervisor

- Session management
- Middle-tier configuration tools
- Real-Time monitoring hierarchy editor
- Health and Services Monitor, Oracle client application

Supervisor suite

The Supervisor suite provides you with the tools to configure jobs, select records, define calling strategies, and report on real-time and historical operations. The Supervisor suite includes Monitor, Editor, Analyst, Health Manager, and Role Editor applications.

Related topics:

Analyst on page 24 Editor on page 25 Monitor on page 26

Analyst

Using Proactive Contact, you can store historical information about agents, jobs, and other important statistics after the end of the job. Analyst is a business and reporting tool that helps in measuring call center performance as per various specified parameters. The Analyst application generates various reports to track information by agent, job, time of the day, and other parameters.

Related topics:

PC Analysis on page 24

PC Analysis

The PC Analysis tool is a part of the Supervisor suite. Using this tool, you can gather data from Avaya Proactive Contact for preparing reports and charts. You can also mail merge letters (Letter Generator) and spreadsheets using your preferred computer software.

The PC Analysis tool extracts data from the following sources:

- Job history
- Agent history
- Calling information statistics

- Calling transactions statistics
- Calling list

PC Analysis extract data example

The following table shows the type of data that can be obtained from the extract sources.

Extract source	Sample data extracted
Job history	Job name Job number Job type Job date Job start time Job end time Job talk time Job idle time
Agent history	Job name Job number Operator Operator date Operator log-in time Operator log-out time Operator talk time Operator idle time
Calling information statistics	Job number Call date Call release time Operator Operator type
Calling transaction statistics	Job number Call date Call release time Time in wait queue Operator Phone line Completion code Phone number Recall count
Calling list	Data from any field on your calling list

Editor

The Editor application is a part of the Supervisor suite. Using the Editor application, you can implement sample phone strategies and perform record selections and jobs. You can verify that the strategies and jobs meet your campaign objectives. If a job does not meet your

objectives, you can modify its settings such as creating or editing a phone strategy or record selection. You can also create a new job to handle other campaign goals.

Using Editor, you can perform the following tasks in a single-dialer or a multi-dialer pod environment:

- Creating and starting jobs
- Changing record selection settings
- Editing phone strategies
- Setting agent blending settings
- Creating and managing wait queue messages and scripts
- Creating and managing Calling Lists
- Creating and managing DNC Groups
- Creating and managing Agent Keys
- Creating and managing Schedules
- Creating and managing Completion Codes
- Creating and managing Campaign Templates

Monitor

The Monitor application is part of the Supervisor suite. You can use this application to identify system resource allocations, set alarms, observe job goals, and display aspects of job productivity. You can also use it to monitor system calling activities, such as job completion percentages and current agent statistics.

Using Monitor, you can create a set of customizable views that display selective data elements as required. You can sort the information to further define the order in which the data elements are displayed. Most important, you can set the scope of data by dialer, by supervisor, or by job. You can save and reuse custom views at any time.

Using Monitor, you can perform the following activities:

- Opening a view set
- Setting a job goal
- Selecting agents to view
- Choosing dialers to include in views
- Finding an agent
- Shutting down a job
- Changing job settings

- Linking a job
- Reassigning phone lines
- Sending a messages to agents

Supervisor tools

Supervisor tools are accessed from the Tools menu in the Supervisor applications. The following table describes each Supervisor tool, along with the application from which each tool originates:

Tool name	Description	Started from
Agent Blending Administrator	Configures domains and domain groups and displays Automatic Call Distributor (ACD) statistics.	Monitor, Editor
Hierarchy Manager	Creates, displays, and modifies agent, job, and dialer hierarchies. Analyst and Monitor use the hierarchy definitions to group data as required by your business.	Monitor, Analyst
PC Analysis Telnet	Retrieves report data files from the dialer for external reporting.	Analyst
System Telnet	Provides access to the dialer through a Unix interface.	Monitor, Editor, Analyst

System Reports

During the specification process, you can identify the columns and fields to be used in the Proactive Contact system while generating call list reports. The following table describes the various reports:

Report name	Description
Release Code Report	Displays customer information based on system and agent call completion codes. It can contain up to 200 codes. System supervisors can generate a Release Code Report for printing or viewing on a supervisor workstation.

Report name	Description
Days On Report	Lists the account information for records that exceed the maximum number of days specified for appearing in a call list. While processing a file, the system keeps track of the number of times a record appears on the same call list. The system flags any record downloaded for more than a specified number of consecutive days. However, these records still remain eligible for the calling.
Reject Report	Lists records that Proactive Contact rejected for calling. While processing a download file, the system rejects duplicate records and records with invalid phone numbers. A phone number can be invalid for several reasons, including incorrect length or missing or invalid area code.

Analyst

The Analyst section of the Using Avaya Proactive Contact Supervisor guide includes the following updates:

Combined call completion statistics: Includes codes 86-88 and 100-199.

Combined call statistics: Includes information about Manual Calls Placed, Records Selected, and Serviced Calls fields.

Combined queue statistics: Includes information about Nuisance calls and Average Time in Queue (Minutes) fields.

Inbound call handling times: Includes information about the Inbound Online Time (Seconds) field.

Managed dialing statistics: Includes information about Average Preview Time (Seconds) field.

Outbound call handling time: Includes information about Outbound Online Time (Seconds) field.

Outbound call statistics: Includes information about Outbound Connects per Hour field.

Person to Person call handling times: Includes information about PTP Online Time (Seconds) and Average PTP TalkTime (Minutes)

Combined RPC and closure statistics: Includes information about Closure Rate of Connects, Closure Rate of RPCs, Closures Per Hour, Non-Right Party Contact Count, Right Party Contact Count, Closure Rate, and Right Party Contact Closure Rate.

Data dictionary: Includes information about Admin rollup, Agent activity, Agent codes, Agent hierarchy, Dialer hierarchy, Job hierarchy, and RAC.

Role Editor

Using Role Editor, you can associate permissions with roles and assign users to appropriate roles.

Predefined Roles: The default roles in Avaya Proactive Contact are Administrator, Supervisor, and Role Administrator.

Permission Types: There are two types of permissions: Operations and Access.

Operations permissions are a fixed set of operations permissions that define the supervisor applications that can be run. Examples of these are permission to run Editor, Monitor, or Health Manager.

Access permissions define the degree of control that an allowed operation has over its managed resources. By default, there are a fixed set of access permission provided with the system:

- Read: For read-only access to a feature
- *Job Control*: To use job control functions, where applicable. This can be added to Read access and is implicit in Write access.
- *Write*: For Read, Write, and Job control access to a feature. Write includes the ability to create, update, and delete data or information.

The Read and Write access permissions are hierarchical. There is a basic Read permission, and a Write permission that includes Read permission. In a few cases, you can add Job Control permission to the Read access permission.

The Using Avaya Proactive Contact Supervisor guide explains roles, permissions, permission types, Role Editor usage, and Role Editor scenarios.

Editor

The Editor application includes the following:

Campaign Template: Explains the overview, campaign template environment, accessing campaign template, campaign template toolbar, campaign template usage, and scenarios.

Campaign Template provides the following advantages:

- Features that enhance efficiency and effectiveness for any contact center.
- Plan and set up any campaigns that can be run in future.
- Respond rapidly to a new campaign request. This feature helps you in creating and deploying a wide range of campaigns quickly and smoothly.

Secondary Staging: Explains the concept and overview of secondary staging, stages of configuration files, types of configuration files, basic rules for working with configuration files, and scenarios.

AES Named Licenses

Licenses named by Application Enablement Services (AES) combine the basic and advanced licenses of TSAPI. You can get both TSAPI basic and advanced licenses, eliminating the need to purchase and manage a complex set of licenses. Named Licensing is available with AES 4.2 and later versions.

Note:

For AES 4.2.1 and above, the CTI link for communicating with Proactive Contact should be selected as secured.

Appendix A: Capacity information for Avaya Proactive Contact

Capacity parameters for Avaya Proactive Contact

The following table provides information about various capacity parameters and their values for Avaya Proactive Contact.

Category	Parameter	Value	Notes	Performan ce parameter
Agent	Name recall name length	30	-	No
Agent	Name length (characters)	8	Alphanumeric	No
Agent	Headset ID length	13	-	
Agent	Max number of agents on Hard dialer (T1/E1)	432/450	PG230 Enabled	Yes
Agent	Max number of agents per pod (T1/E1)	1728/1800	PG230 Enabled	Yes
Agent	Max number of preview agents on Soft dialer	240	CTI Enabled	Yes
Agent	Max number of predictive agents on Soft dialer	100	CTI Enabled	Yes
Agent	Unique IDs on the system	32K	-	No
Agent Blending	Number of Vector Directory Numbers (VDNs) Hard dialer / Soft dialer	600/300	-	No
Agent Blending	Number of logins	900	Blended system number, but only 432 agents can log into the dialer at a time.	No
Agent Blending	Managed dialing with agent blend	-	No special configuration needed.	Yes

Category	Parameter	Value	Notes	Performan ce parameter
Campaign s	Number of active supported (single Dialer)	150 (75 if AOR is turned On)	-	Yes
Campaign s	Number of active supported (Pod)	 300 if AOR is turned On 600 if AOR is turned Off 	-	Yes
Campaign s	Number of active supported (CTI)	 1. 150 if AOR is turned Off 2. 75 if AOR is turned On 	Preview and predictive	Yes
Calling List	Record length (bytes)	8192	-	Yes
Calling List	Maximum list size (gigabytes)	2	Linux limit is 2 GB	Yes
Calling List	Number of unique calling lists	999	-	No
Calling List	Record size (bytes)	4096	Configurable	Yes
Calling List	Maximum records	900000	-	Yes
Calling List	Number of fields	Limited only by record length	Limited only by record length	Yes
Calling List	Number of phone fields	10	-	No
Calling List	Sortable fields	10	-	No
Calling List	Phone field digits	20	-	No
Calling List	Post-update - max attempts stored in calling list	5	-	No
Character Length	Dialer host name (English/ other language)	12	-	No
Character Length	DO NOT CALL group name (English/other language)	32/10	-	No

Category	Parameter	Value	Notes	Performan ce parameter
Character Length	Maximum name length of selection (English/other language)	20/15	-	No
Character Length	Recommended name length of selection (English/other language)	20/15	-	No
Character Length	Maximum job name length (English/other language)	20/15	-	No
Character Length	Recommended job name length (English/other language)	15/8	-	No
Character Length	Job unit ID length	32	Single byte	No
Character Length	Job ID length	8	Job Id is generated automatically.	No
			• JOBID in Calling list has fixed length of 8 characters and it is non- editable	
Character Length	Job name length	20	Limited to 20 to accommodate double-byte characters.	No
Character Length	Strategy name length	20	Limited to 20 to accommodate double-byte characters.	No
Character Length	Single message size	72	-	No
Character Length	ANI/DNIS field length	15	-	No
Character Length	Calling list field length	8192	-	No
Database	Access	Read only	Chargeable ODBC access.	No
General	Line pools	50	-	Yes

Category	Parameter	Value	Notes	Performan ce parameter
General	Time zones	60	Configuration limit	No
General	Number of predictive blend gateways	10	-	Yes
General	Identification field length	256	-	No
General	No. of Identification field	4	-	No
General	Completion codes	200	-	No
General	Telephony script lines	6000	-	No
General	Screen size	23x79	Supports multiple screens.	No
General	Event service clients	20	The default value is 20. This parameter is configurable.	Yes
General	Event service refresh (seconds)	6	-	Yes
General	Internet Monitor refresh (seconds)	15	The minimum value is 15 seconds.	Yes
General	Average backup size	15 GB	Includes 3 GB for lists and is based on 10% usage of the 148 GB drive.	Yes
General	Telnet sessions	Unlimited	-	Yes
General	Busy Hour Call Attempts (BHCA)	172000	-	Yes
General	Maximum Call Selection	80	The value should be in sync with maximum strategy	Unknown
General	Dialed digit support	15	-	No
General	Number of Switches	10		
Hardware	Agent, outbound, inbound and transfer	-	All can be on the same card. Minimum of 24.	No

Category	Parameter	Value	Notes	Performan ce parameter
Hardware	Total LPVC ports	384	128 per card. Maximum of 3 cards	No
Hardware	Backup media	Tape/DVD/ TPH	TDK DVD-R 16x 4.7GB Not dual layer	No
Hardware	Number of NICs	2	One NIC is used for your network and the other NIC is connected to the PG230 switch.	No
Hardware	ENBC	-	Switch generic 18.0.3 or above	No
Hardware	RAM (Gigabytes) for G2/G5/M2/G7 server	 8 GB RAM for HP ProLiant DL385 G2/G5 servers 16 GB RAM for IBM Nextgen 3650 M2 server (also known as S8800) 24 GB RAM for HP ProLiant DL360 G7 8/8/16/24 	HP ProLiant DL385 G2/G5 servers were shipped with 8 GB, but podded or high volume systems require 16 GB RAM. The IBM Nextgen 3650 M2 servers were shipped with 16 GB RAM. HP ProLiant DL360 G7 servers are shipped with 24 GB RAM.	Yes
	IR and VP integration protocol	-	TCP/IP through the agent socket using SSL	No
Integration	Crystal reports professional version	8.5	-	No

Category	Parameter	Value	Notes	Performan ce parameter
Integration	G450	Yes	5.2.1	No
Integration	IVR agents	100	-	No
Integration	Nice			
Integration	Verint		Ultra 10 CTI server is backward compatible to Verint 9.3	
Integration	Witness			
Jobs	Line pools per job	10	-	No
Jobs	Number of configured jobs (Tested/Recommended)	500/200	These are not necessarily the active jobs.	No
Jobs	ID fields	4	-	No
Jobs	Job Description length	40 bytes	-	No
Messages	Messages per LPVC	34	Number of messages is determined by the sum of all message lengths that can fit into the maximum 34 minutes limit of the LPVC. The number of messages that can be played is not affected by the number of LPVCs.	No
Messages	Message storage capacity per LPVC (minutes)	-	Message storage capacity is not increased with more LPVCs. Only the number of LPVC ports are increased.	No
Monitor	Number of Monitor views	Unlimited	Alerts and filtering recommended.	Yes

Category	Parameter	Value	Notes	Performan ce parameter
Physical	Maximum Dialers per pod	4	-	Yes
Physical	Number of phone lines	912	-	Yes
Supervisor	Number of Supervisor applications on standalone dialer	25	-	Yes
Supervisor	Number of Supervisor applications per pod	70	-	Yes
Supervisor	Number of Supervisor applications, CTI	10	-	Yes
System	Protocols	-	JDBC, TCP over SSL, and SSLIOP	No
System	CTI Dialer	-	Uses VDNs to place calls. The class of restriction feature guides calls to trunk groups. Connects to an Ethernet port on the AES server, not to a C-LAN card.	No
System	Java	1.6	-	No
Network	Network bandwidth minimum/ recommended (megabytes)	100/1000	Avaya recommends 100 MB.	Yes
Network	D-channel band rate	64kb	-	Yes
Network	Real-Time database connections/clients	25/70	-	Yes
Unit IDs	Number	50K	-	No
Work List	Infinite and Unit Work List	-		No
Work List	Line Assign	10		
Work List	Max Strategy	300		
Work List	Maximum allowed units that agent can login to in multiunit job	15		

Interoperatibility of Avaya Proactive Contact with other Avaya products

Avaya Proactive Contact can work with various other Avaya products.

The following table provides information on the supported versions of various Avaya products.

Product name	Supported version
Secure Access Link	1.5
Application Enablement Services	4.2, 4.2.1, 5.2, and 6.1
	😒 Note:
	For Application Enablement Services 4.2.1 and later versions, the CTI link to communicate with Avaya Proactive Contact should be set as the secured connection.
Communication Manager	5.2.1, 6.0, and 6.1
Avaya WebLM	4.7
Interactive Response	4.0.6
Avaya IQ	4.2, 5.0, and 5.1
Voice Portal	4.1, 5.0, and 5.1
Avaya Aura [®] Contact Center	6.0 SP3 or 6.1
Avaya Aura [®] Contact Center Elite	6.0.1 or 6.2
Call Management System	15.0, 16.0, 16.1, and 16.2
CS 1000	R6.0 and R7.0