



Avaya Solution & Interoperability Test Lab

Application Notes for Shaw Systems COLLECTIONS with Avaya Proactive Contact with PG230– Issue 1.0

Abstract

These Application Notes describe the configuration steps required for Shaw Systems COLLECTIONS to interoperate with Avaya Proactive Contact with PG230.

In the compliance testing, Shaw Systems COLLECTIONS used the Agent API from Avaya Proactive Contact to provide custom agent desktop for agent handling of outbound calls delivered by Avaya Proactive Contact.

Readers should pay attention to **Section 2**, in particular the scope of testing as outlined in **Section 2.1** as well as any 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 required for Shaw Systems COLLECTIONS to interoperate with Avaya Proactive Contact with PG230.

In the compliance testing, Shaw Systems COLLECTIONS used the Agent API from Avaya Proactive Contact to provide custom agent desktop for agent handling of outbound calls delivered by Avaya Proactive Contact.

The compliance test used the Avaya Proactive Contact with PG230 deployment option, and covered the handling of outbound calls via the custom agent desktop for Outbound and Managed jobs. Shaw Systems COLLECTIONS does not support handling of outbound calls for other job types, nor for handling of inbound ACD calls.

2. General Test Approach and Test Results

The feature test cases were performed both automatically and manually. Outbound calls were automatically placed to the PSTN and delivered to COLLECTIONS agents by Proactive Contact. Inbound calls were manually placed from the PSTN. Different actions were initiated from COLLECTIONS agent, to verify proper Agent API exchanges.

The serviceability test cases were performed manually by disconnection/reconnecting the Ethernet connection to the COLLECTIONS agent and server.

The verification included checking the display of fields, options, and values on COLLECTIONS agent, and checking the exchanged API messages in the agent logs.

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 feature and serviceability testing.

The feature testing focused on verifying the following on COLLECTIONS agents:

- Handling of outbound calls over Outbound and Managed jobs.
- Handling of linked jobs with same job types.
- Log in, join campaign, leave campaign, and log off.
- Hold, reconnect, call transfer, agent drop, customer drop, equivalent actions for release line and finish work, and update of call record with completion code.

The serviceability testing focused on verifying the ability of COLLECTIONS to recover from adverse conditions, such as disconnecting/reconnecting the Ethernet connection to the COLLECTIONS agent and server.

2.2. Test Results

All test cases were executed, and the following were observations on COLLECTIONS:

- Conference could not be established in the testing using the associated icons. Shaw Systems indicated that they have a workaround available, but it was not verified during the testing.
- Care needs to be taken in the creation of calling lists and download of customer records from host. In the event that there is a call record not matching to any entry in the COLLECTIONS database, then the application can stop automatically on the server. The recovery procedure requires manual restart of application on the server and on all clients.
- After the server experienced an Ethernet disruption and recovered, the application on all clients need to be manually restarted.
- The pre-configured activity codes did not match completely to the activity codes presented to the agents in the testing. Some codes did not have the dialer designation even though configured, and some codes had the dialer designation but cannot be selected.
- The application only supports linked jobs with the same job type.

2.3. Support

Technical support on COLLECTIONS can be obtained through the following:

- **Phone:** (800) 316-1947
- **Web :** <http://support.shawsystems.com/>

3. Reference Configuration

COLLECTIONS consist of the SQL, COBOL, and client components. The COBOL component can run on a mainframe or on a Windows server. In the compliance testing, the COBOL and SQL components were installed on the COLLECTIONS server on Windows, which also contained Microsoft SQL Server 2008. The client component interfaced with Proactive Contact, and was installed on every agent PC.

COLLECTIONS also include a COLLCOMM application used for management. In the compliance testing, the COLLCOMM application was running on the COLLECTIONS server.

The detailed administration of basic connectivity between Communication Manager and Proactive Contact, between Communication Manager and Application Enablement Services, and of contact center devices are not the focus of these Application Notes and will not be described.

Furthermore, the integration with COLLECTIONS requires creation of calling lists with each call record mapping to an account in the COLLECTIONS database. The creation of such calling lists along with download of customer records from host is not the focus of these Application Notes and will not be described.

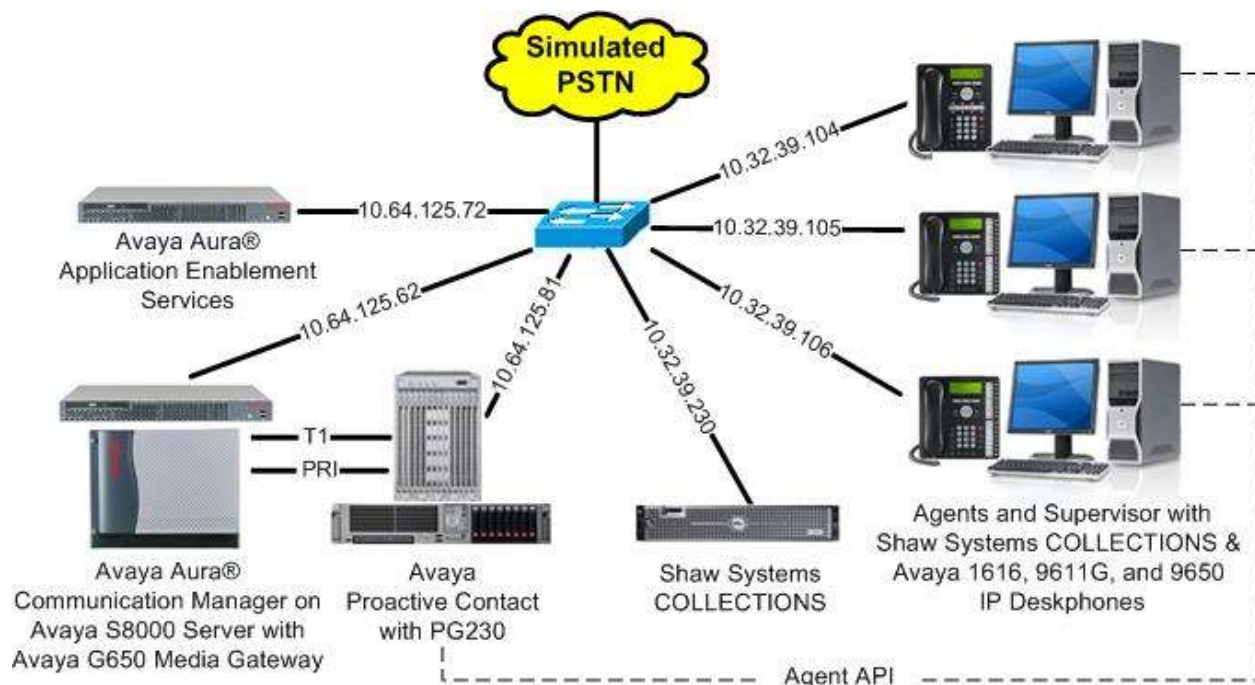


Figure 1: Compliance Testing Configuration

4. Equipment and Software Validated

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

Equipment/Software	Release/Version
Avaya Aura® Communication Manager on Avaya S8800 Server with Avaya G650 Media Gateway	6.3.11 (R016x.03.0.124.0-22361)
Avaya Aura® Application Enablement Services	6.3.3 SP4 (6.3.3.4.10-0)
Avaya Proactive Contact with PG230	5.1.1
Avaya 1616 IP Deskphone (H.323)	1.350B
Avaya 9611G IP Deskphone (H.323)	6.4.0.14
Avaya 9650 IP Deskphone (H.323)	3.230A
Shaw Systems COLLECTIONS on Windows Server 2008 R2 Enterprise <ul style="list-style-type: none">Microsoft SQL Server 2008 R2COLLCOMM	5.2.1 SP118 SP 1 10.50.4000.0 5.2.1
Shaw Systems COLLECTIONS on Windows 7 Professional <ul style="list-style-type: none">Avaya Proactive Contact Agent API SDK	5.2.1.11802 Service Pack 1 5.1.1

Configure Avaya Proactive Contact

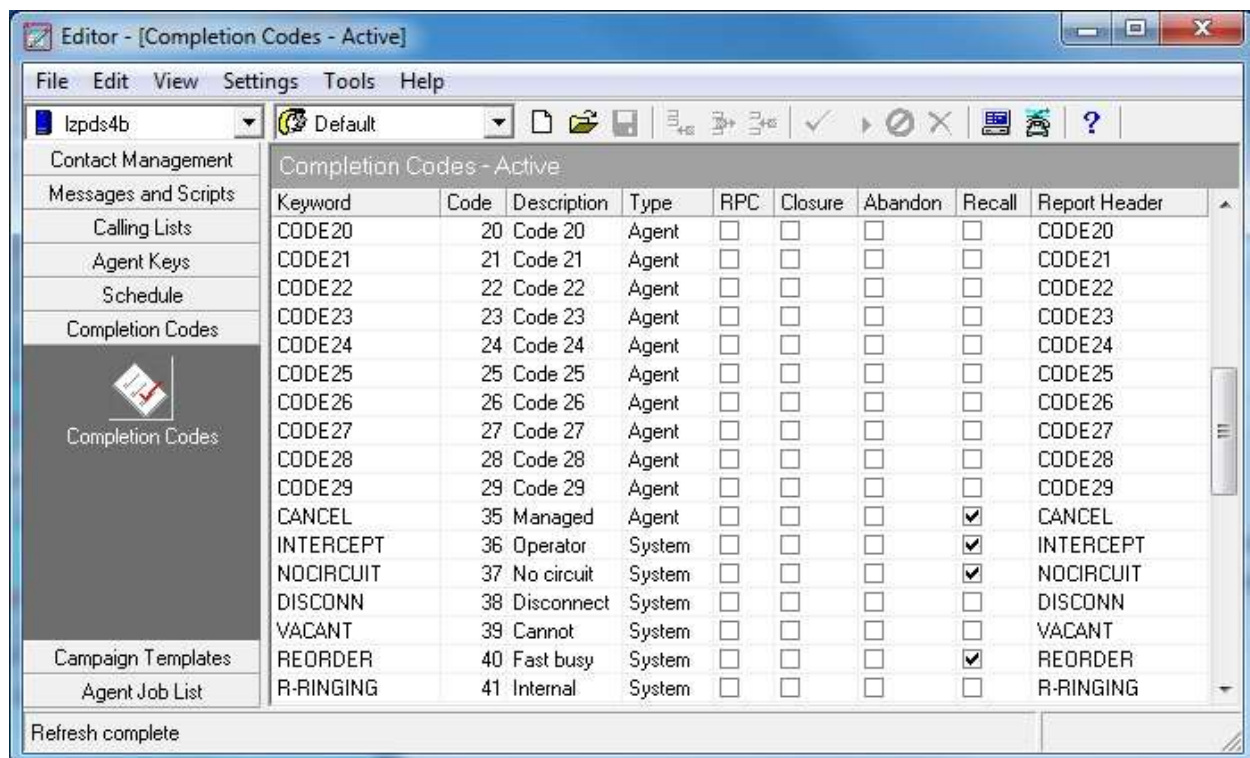
This section provides the procedures for obtaining information from Proactive Contact. The procedures include the following areas:

- Obtain completion codes

4.1. Obtain Completion Codes

From the PC running the Avaya Proactive Contact Supervisor, select **Start → All Programs → Avaya → Proactive Contact 5.1 → Supervisor → Editor**, and log in with the appropriate credentials.

The **Editor** screen is displayed. Select **Completion Codes → Completion Codes** from the left pane, to display the **Completion Codes - Active** screen. Make a note of pre-defined completion codes that will be used for integration with COLLECTIONS. In the compliance testing, completion codes 20-29 were used.



5. Configure Shaw Systems COLLECTIONS

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

- Administer activity codes
- Map activity codes
- Administer COLLECTIONS.INI
- Administer DIALER.RDO

5.1. Administer Activity Codes

From the server or PC running the COLLCOMM application, select **Start → COLLECTIONS 5.1.1 → COLLCOMM** to launch the application.

The **Login to COMMANDER** window is displayed. Enter the relevant bank number and the appropriate administrator credentials. **Bank** is a business entity identification, and bank number **0001** was pre-configured on COLLECTIONS.

A screenshot of a Windows-style dialog box titled "Login to COMMANDER™ - Ally_Prod_Tst .v5.2". The dialog has a light gray background with a teal border. It contains three input fields: "Bank" with the value "0001", "User ID" which is empty, and "Password" which is empty. Below the fields are two buttons: "OK" and "Cancel".

The screen below is displayed. Select **System Maintenance → Activity Maintenance** from the top menu.



The screen below is displayed next. Configure the desired activity codes. In the compliance testing, all activity codes were pre-configured, and below is a screenshot showing a subset of the pre-configured activity codes. Note that not all activity codes below were used for integration with Proactive Contact.

The screenshot shows the 'COMMANDER - Activity Maintenance' window. On the left is a table of activity codes, and on the right are configuration fields for a selected activity.

Bank	Activity	Description	Status	Changed By	Changed
0001	9LAS	Letter Sent	A	0001-DJW	03/04/2015
0001	A012	Chris Test	A	1969-CAMD	05/22/2014
0001	AAAA	test	A	0001-DJW	03/08/2015
0001	AADA	test	A	1969-CAMD	03/17/2015
0001	ABCD	test	A	1969-CAMD	09/04/2014
0001	AJSA	Aarons Called and Contact	A	0001-RMG	03/17/2015
0001	AJSB	Aarons Called No Answer	A	1969-CAMD	03/17/2015
0001	AJSC	Aarons No Call or Contact	A	1969-CAMD	04/29/2014
0001	AJST	Aarons ACT Test	A	1969-CAMD	07/01/2014
0001	AR05	Advance Review Date 5 day...	A	1969-CAMD	05/14/2015
0001	AR10	Advance Review Date 10 da...	A	1969-CAMD	05/14/2015
0001	B1MM	testing Lower	A	1969-CAMD	09/04/2014
0001	BBCJ	testing	A	1969-CAMD	09/04/2014
0001	BDD5	BDD5	A	1969-CAMD	03/19/2015
0001	BDJQ	testing lower again	A	1969-CAMD	09/04/2014
0001	BENJ	Ben's Test Phone Activity	A	1969-CAMD	04/23/2015
0001	BIGP	Buyer Incoming Ground PTP...	A	1969-CAMD	06/02/2014
0001	BLUE	BLUE	A	0001-DJW	01/08/2015
0001	BMM2	Ben 2	A	1969-CAMD	07/07/2014
0001	BMM3	test	A	1969-CAMD	07/07/2014
0001	BMMM	Ben Mayne Actv	A	1969-CAMD	07/07/2014

Configuration fields for Activity Bank: 0001, Activity Code: 9LAS, Activity Desc: Letter Sent.

Promise / Contact

Promise Req: Not Allowed, Max Promises: 00, Contact Flag: No
 Min Promise Amt: 0, Min Promise %: 000, Called Flag: No
 Notes Required: Not Allowed, Grace Days: 00, Max Promise Days: 11, Max Sub Promise Days: 11

Review Date

Auto Advance Days: 00, Auto Advance From Date of: Today
 Max Advance Days: 04
 Time Loop: No, Time Loop Default Minutes: 000

List Interaction

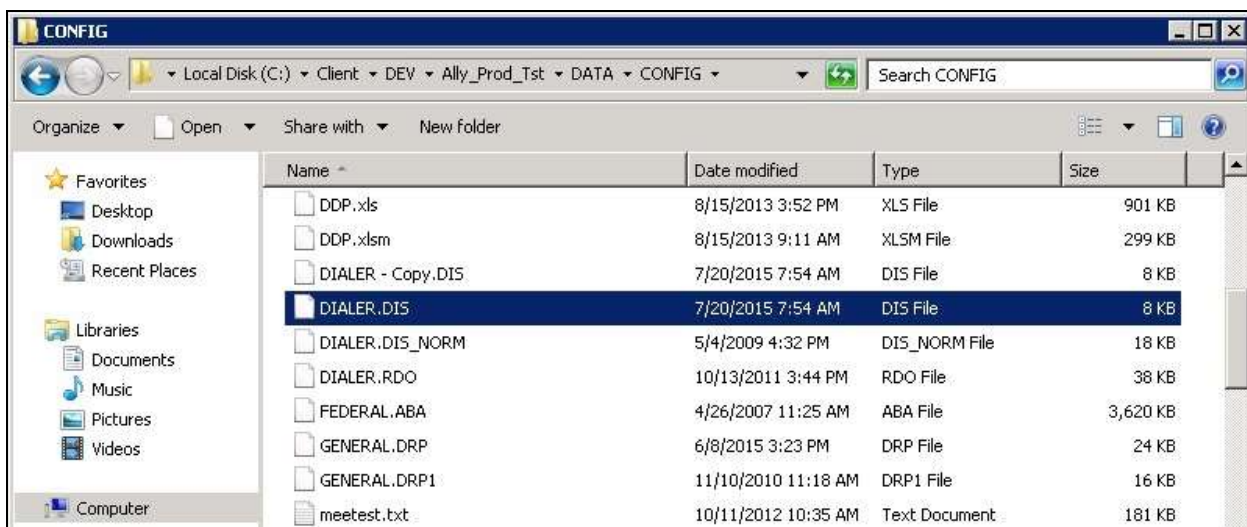
ULS 1: , ULS 2: , ULS 3:
 Refer to: Not Allowed
 Support: 0000-NOT ASSIGNED

Categories

Arch Category: 3, Sec Category: 3, Stat Category: 06-LETTERS

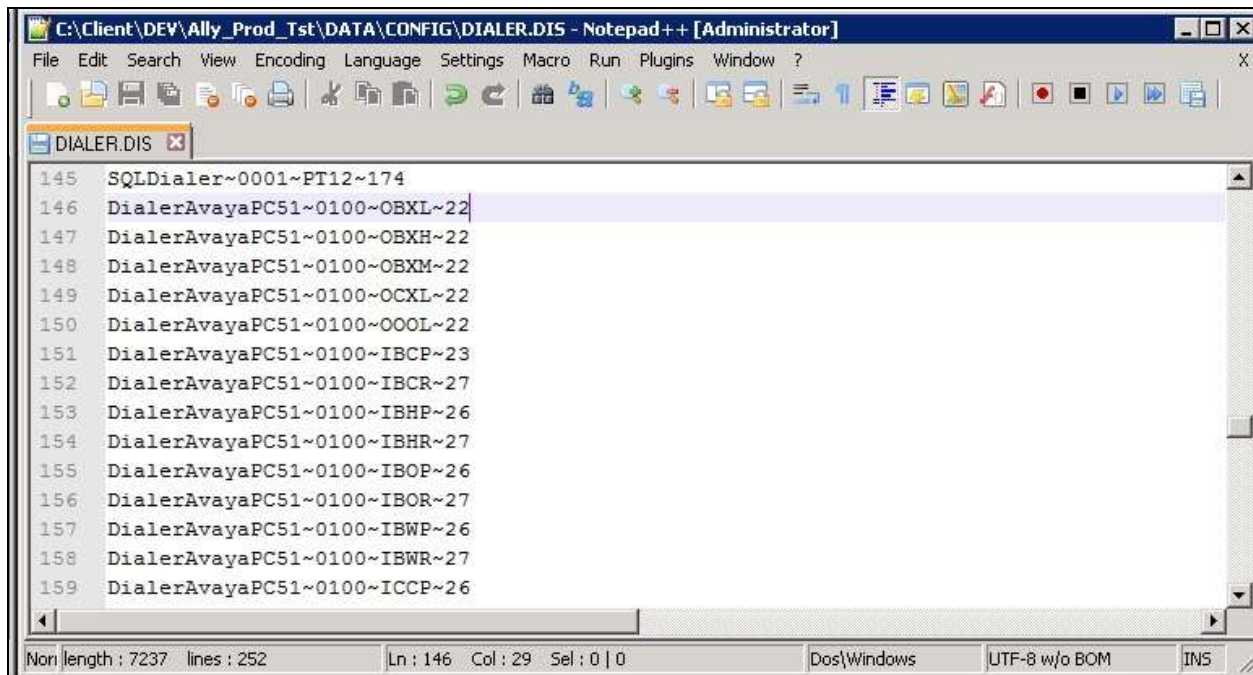
5.2. Map Activity Codes

From the COLLECTIONS server, navigate to the directory containing the **DIALER.DIS** file, in this case **C:\Client\DEV\Ally_Prod_Tst\DATA\CONFIG**. Open the file with a text editor application, such as Notepad++.



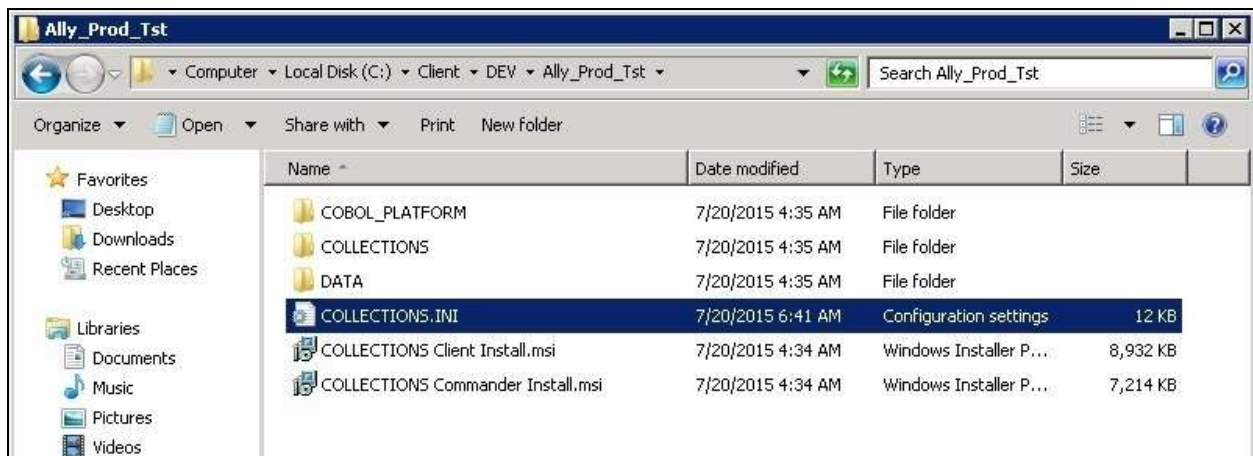
Navigate to the **DialerAvayaPC51** section, and update this section with a line entry for mapping of each applicable activity codes from **Section 5.1** to a relevant completion code on Proactive Contact from **Section 4.1**.

In the compliance testing, completion code values 20-29 on Proactive Contact were used for this integration. Note that the mapping of COLLECTIONS activity code to Proactive Contact completion code can be many-to-one, and the screenshot below shows a subset of the mappings used in the testing.



5.3. Administer COLLECTIONS.INI

From the COLLECTIONS server, navigate to the directory containing the **COLLECTIONS.INI** file, in this case **C:\Client\DEV\Ally_Prod_Tst**. Open the file with a text editor application, such as Notepad++.



Navigate to the **DIALER CONFIGURATION** section, and create entries highlighted in the screenshot with values described below.

- **DIALER-EXCHANGE-INTERFACE:** “DialerAvayaPC51”
- **DIALER-DEFAULT-IP:** IP address of Proactive Contact server.
- **DIALER-DEFAULT-PORT:** “22700”
- **DIALER-PHONE-NUMBER-PREFIX:** Applicable dialing prefix for external calls.

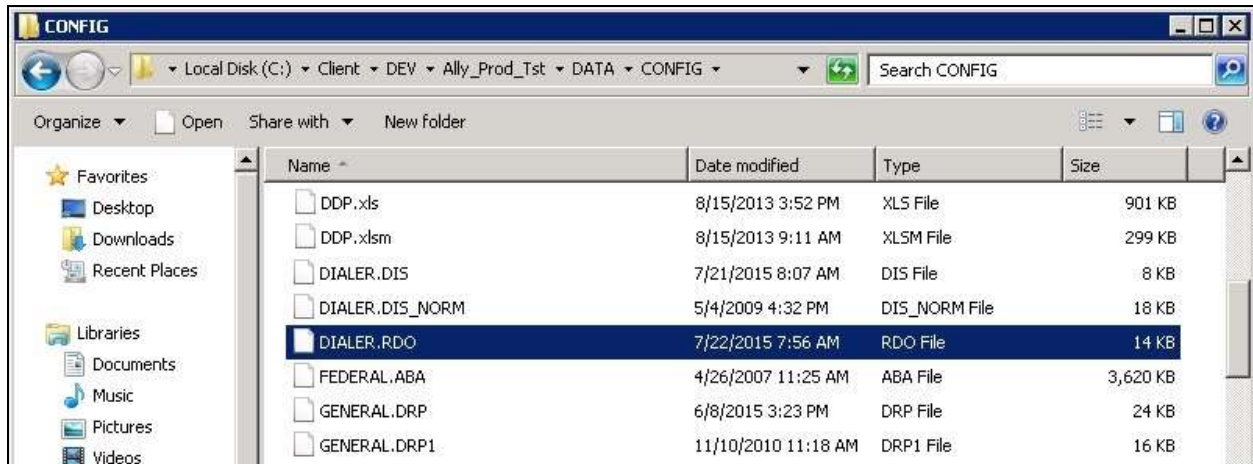
In the compliance testing, the dialing prefix for external calls required by Communication Manager was “9”.

The COLLECTIONS.INI file will be picked up by each COLLECTIONS client upon log in.

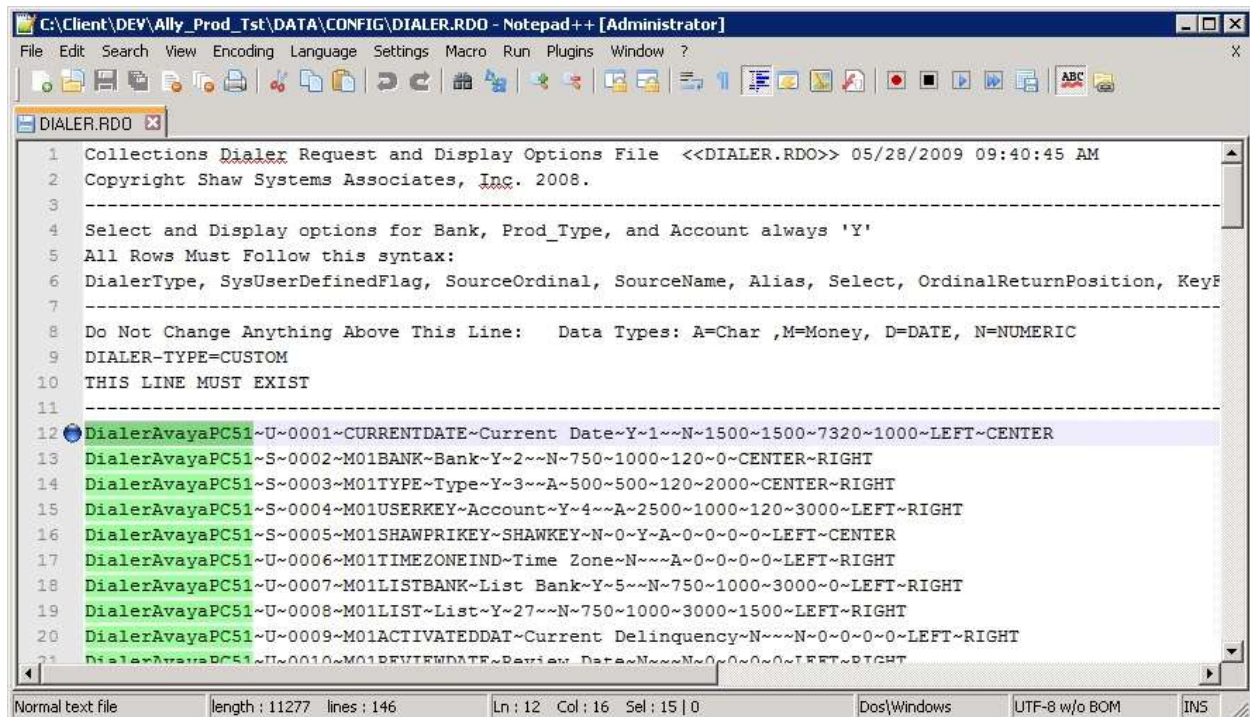
```
269
270 *** DIALER CONFIGURATION ***
271 DIALER-ACTIVE=YES
272 !DIALER-EXCHANGE-INTERFACE="DialerICTUnifiedIP65"
273 !DIALER-EXCHANGE-INTERFACE="SQLDialer"
274 !DIALER-EXCHANGE-INTERFACE="DialerAspectConversations60"
275 !DIALER-EXCHANGE-INTERFACE="DialerAspectConversations61"
276 !DIALER-EXCHANGE-INTERFACE="DialerICTUnifiedIP65"
277 !DIALER-EXCHANGE-INTERFACE="DialerAspectUnifiedIP66"
278 !DIALER-EXCHANGE-INTERFACE="DialerAvayaPDS12"
279 DIALER-EXCHANGE-INTERFACE="DialerAvayaPC51"
280 DIALER-DEFAULT-IP=10.64.125.81
281 DIALER-DEFAULT-PORT=22700
282 DIALER-PHONE-NUMBER-PREFIX=9
283 SMARTDIAL-ACTIVE=NO
284 SMARTDIAL-XPD-FILE-PATH=\\WIN-DVE9109V6RQ\Client\DEV\Ally_Prod_Tst\DATA\SWAP\SMRTDIAL.
285 DISPOSITION-FILE-PATH=\\WIN-DVE9109V6RQ\Client\DEV\Ally_Prod_Tst\DATA\CONFIG\DIALER.DI
```

5.4. Administer DIALER.RDO

From the COLLECTIONS server, navigate to the directory containing the **DIALER.RDO** file, in this case **C:\Client\DEV\Ally_Prod_Tst\DATA\CONFIG**. Open the file with a text editor application, such as Notepad++.



Create a **DialerAvayaPC51** entry line for every parameter in the calling list used by COLLECTIONS, along with pertinent screen positioning information, as shown below.

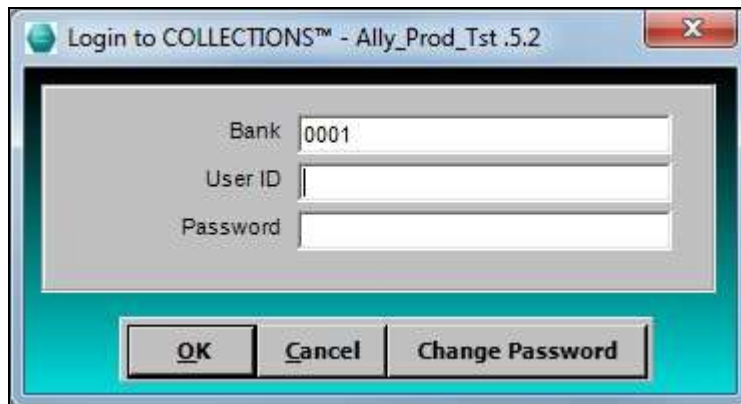


6. Verification Steps

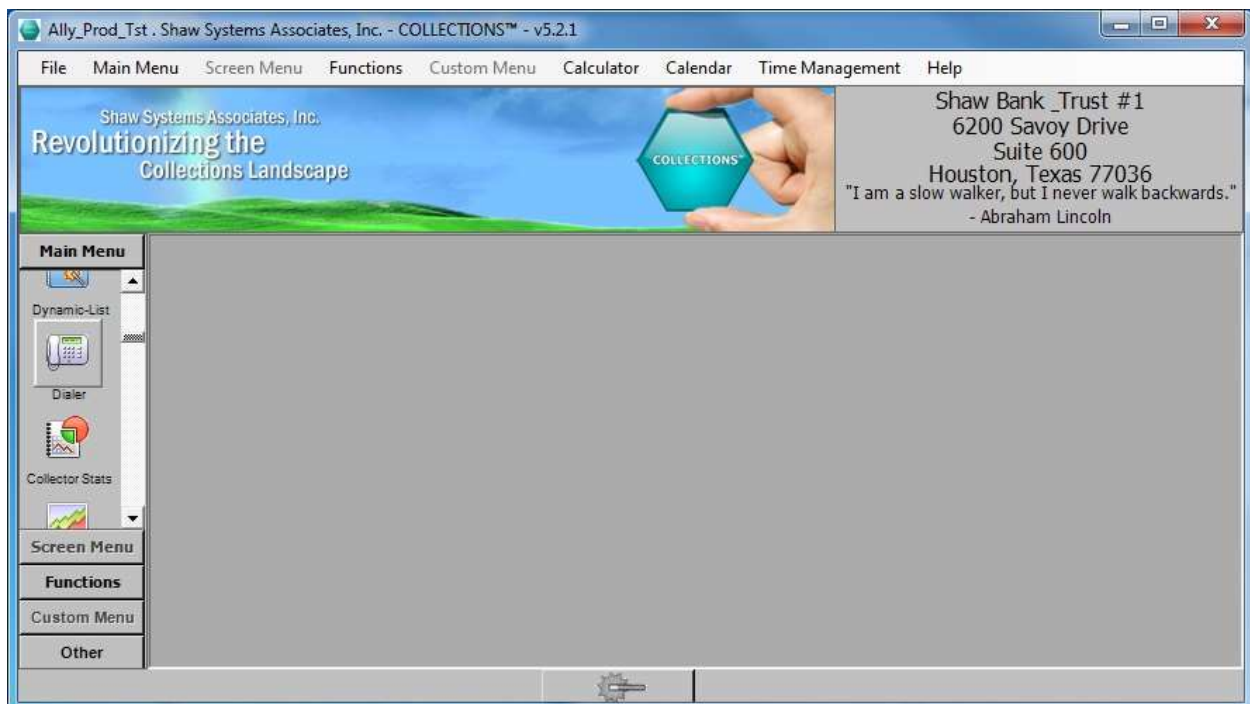
This section provides the tests that can be performed to verify proper configuration of COLLECTIONS and Proactive Contact. Prior to verification, start an Outbound job on Proactive Contact.

6.1. Verify Shaw Systems COLLECTIONS

From the agent PC running COLLECTIONS client, select **Start → All Programs → COLLECTIONS 5.2.1 → COLLECTIONS**. The login screen below is displayed. Enter the appropriate bank number and a valid agent credential from COLLECTIONS.



The screen below is displayed next. Select **Main Menu → Dialer** from the left pane.



The login screen below is displayed. Enter the following values for the specified fields, and retain the default values for the remaining fields.

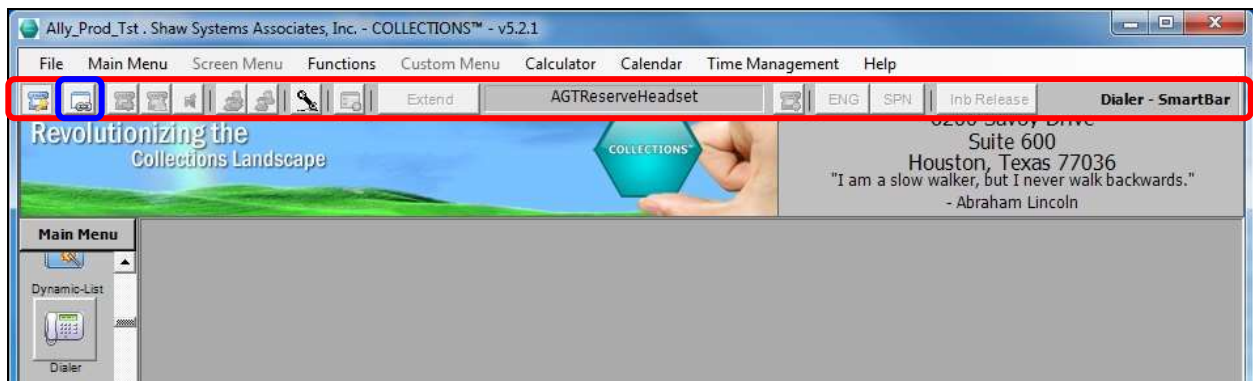
- **Dialer Login ID:** An existing agent user credential from Proactive Contact.
- **Dialer Extension:** The station extension used by the agent.
- **Dialer Password:** An existing agent user credential from Proactive Contact.
- **Agent Type:** Select the applicable type, in this case “Outbound”.
- **Log in to ACD:** Check this field when applicable.



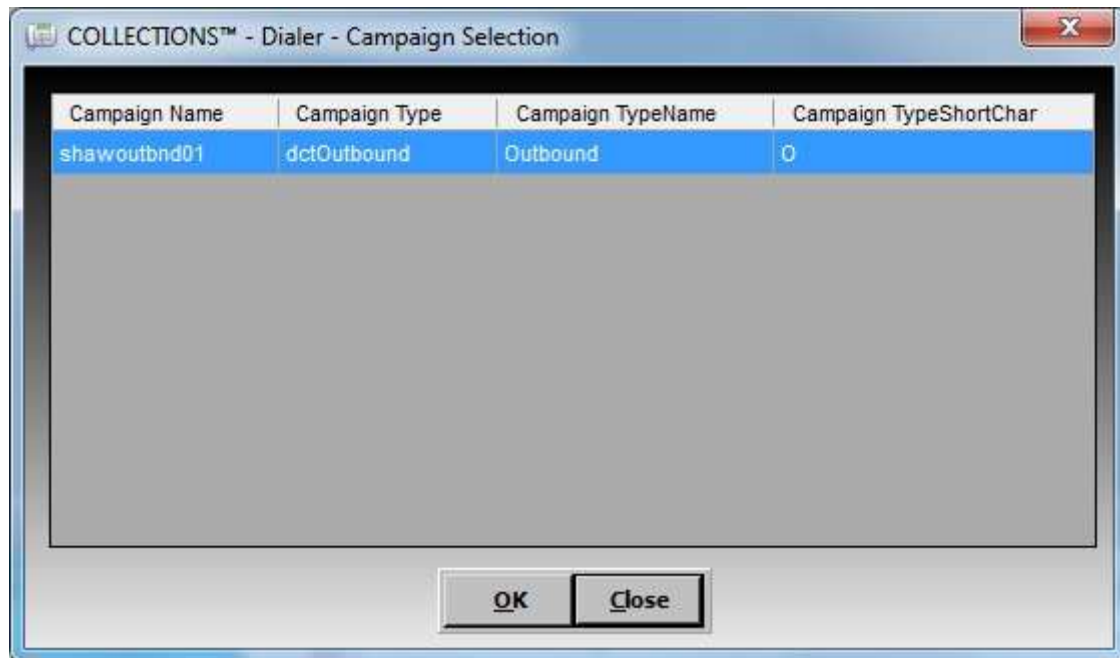
The screenshot shows a dialog box titled "COLLECTIONS™ - Dialer - Login". It contains several input fields and a checkbox. The fields are: "Dialer Login ID" with the value "agent1", "Dialer Extension" with the value "65001", "Dialer Password" with the value "**", "IPAddress" with the value "10.64.125.81", "Port" with the value "22700", "Agent Type" with a dropdown menu showing "Outbound", "Log in to ACD" with a checked checkbox, and "Switch ID" with the value "1". At the bottom of the dialog box are three buttons: "OK", "Cancel", and "Change Password".

Verify that a call is placed from Proactive Contact to the station extension above. Answer the call at the agent to establish the dedicated connection.

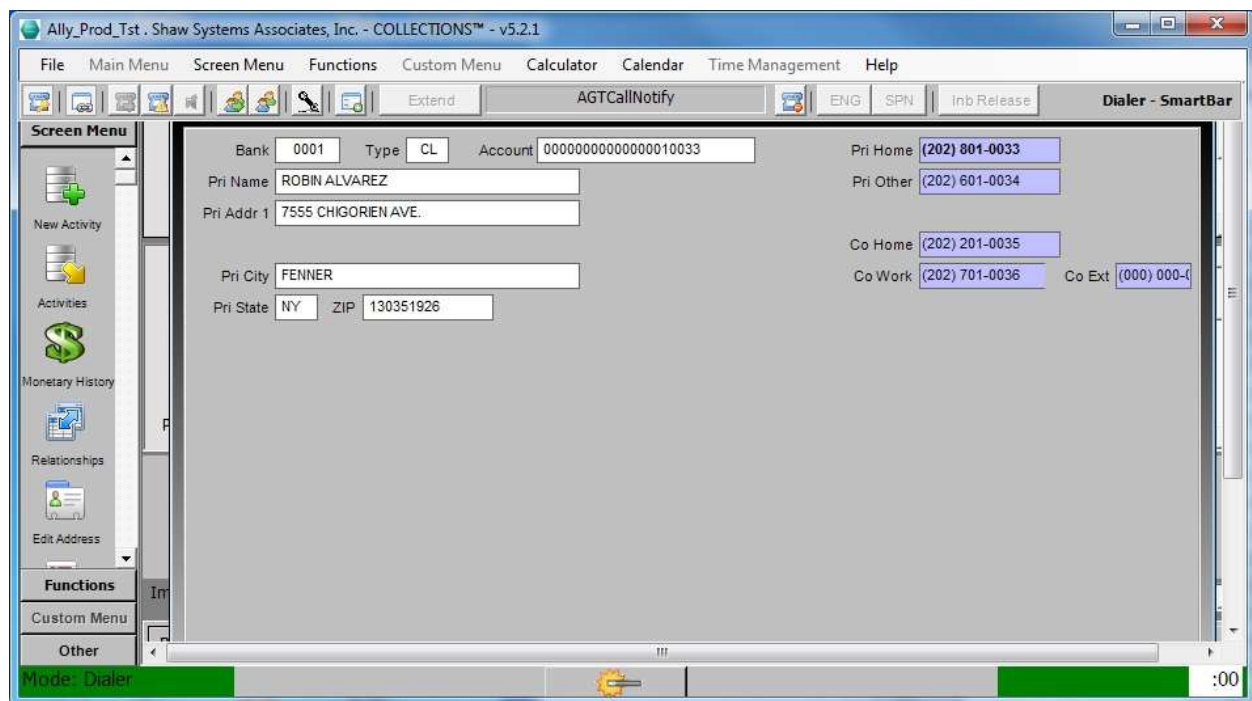
Also verify that the main screen is updated with a floating bar shown below. Click on the **Campaign** icon.



Verify that the screen below is displayed with a list of available campaigns. Select the applicable campaign entry.



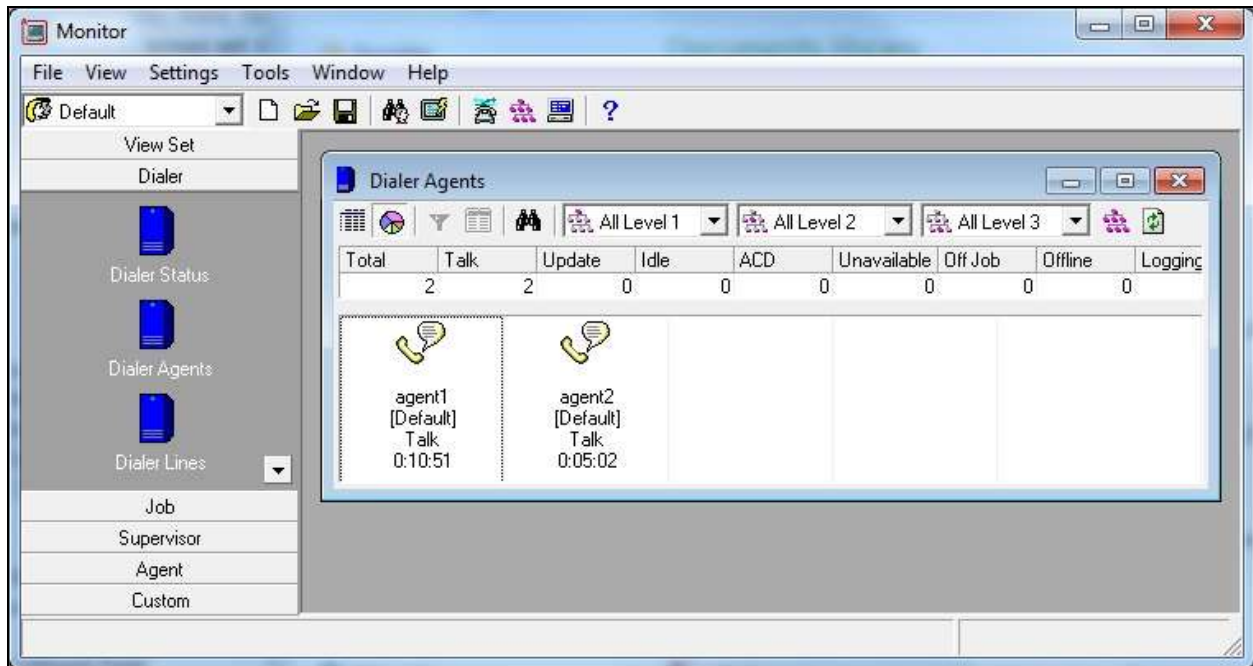
Verify that an answered outbound call with the PSTN is connected to the agent telephone, and that the agent screen is populated with the relevant customer data, as shown below.



6.2. Verify Avaya Proactive Contact

From the PC running the Avaya Proactive Contact Supervisor, select **Start → All Programs → Avaya → Proactive Contact 5.1 → Supervisor → Monitor**, and log in with the appropriate credentials.

The **Monitor** screen is displayed. Select **Dialer → Dialer Agents** from the left pane, to display the **Dialer Agents** screen. Verify that all logged in agents via COLLECTIONS are displayed, as shown below.



Conclusion

These Application Notes describe the configuration steps required for Shaw Systems COLLECTIONS to successfully interoperate with Avaya Proactive Contact with PG230. All feature and serviceability test cases were completed with observations noted in **Section 2.2**.

7. Additional References

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

1. *Administering Avaya Aura® Communication Manager*, Document 03-300509, Issue 10, Release 6.3, June 2014, available at <http://support.avaya.com>.
2. *Avaya Aura® Application Enablement Services Administration and Maintenance Guide*, Release 6.3, 02-300357, June 2014, available at <http://support.avaya.com>.
3. *Controlling COLLECTIONS*, Release 5.2, available to customers as part of COLLECTIONS release delivery.
4. *COLLECTIONS User Guide*, Release 5.3, October 2013, available to customers as part of COLLECTIONS release delivery.

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