uptivity
by inContact.

on Premises

Uptivity WFO Customer Guide to Avaya PC Dialer Integrations

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- **Version** — This guide should be used with Uptivity WFO v5.6 or later.

- **Revision** — September 2015

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Introduction

Audience

This document is written for customers and prospective customers interested in using Uptivity WFO Call Recording in an Avaya PC Dialer telephony environment. Readers who will perform procedures in this guide should have a basic level of familiarity with IP telephony, general networking, the Windows operating system, Avaya Proactive Contact, and Uptivity WFO.

Goals

The goal of this document is to provide knowledge, reference, and procedural information necessary to understand a proposed Avaya/Uptivity WFO integration using the Avaya PC Dialer, and to configure the Avaya equipment to support the integration.

This document is NOT intended as a specific system or network design document. If further clarification is needed, consult with your telephony vendor(s).

Assumptions

This document assumes the reader has access to an Uptivity WFO Sales Engineer, Project Manager, or other resource to assist in applying this information to the reader's environment.

Need-to-Knows

To facilitate ease of use, this document takes advantage of PDF bookmarks. By opening the bookmark pane, readers can easily refer to the portion(s) of the guide that are relevant to their needs. For example, the Uptivity WFO application administrator can click on the **Customer Administration Tasks** bookmark to jump directly to that section.

To expand and collapse the bookmark pane, click on the bookmark icon on the left side of the document window.

For information and procedures related to Uptivity WFO configuration, consult the Uptivity WFO installation team.

Passive VoIP recording requires additional considerations and is covered in a separate document: the *Uptivity WFO Customer Guide to Passive VoIP Recording*. If you are combining an Avaya PC Dialer integration with passive VoIP recording, you will need to refer to that document as well as this guide.

The Avaya PC Dialer integration requires another TDM or VoIP integration for its audio source. Refer to the appropriate guide for the audio source integration for additional knowledge and requirements: *Uptivity WFO Customer Guide to Avaya DMCC-MR Integrations, Uptivity WFO Customer Guide to Avaya DMCC-SO Integrations, Uptivity WFO Customer Guide to Avaya DMCC-SSC Integrations, Uptivity WFO Customer Guide to Ai-Logix NGX Integrations*, or the *Uptivity WFO Customer Guide to Passive VoIP Recording*.

Terminology

To ensure a common frame of reference, this guide uses the following terms in conjunction with this Avaya integration:

- **AACC:** Avaya Aura Contact Center. AACC is an Avaya contact center product that is common in VoIP environments and in multi-channel call centers due to its support for non-voice interactions.

- **AES:** Application Enablement Services. The AES server in an Avaya contact center hosts software that provides CTI events

- **Avaya CMS:** Avaya Call Management System. This contact center product is designed for businesses with complex contact center operations and high call volume. Sometimes referred to as Avaya CM.

- **DMCC:** Device Media Call Control. This functionality of the Avaya AES and AACC servers provides a means of active recording via VoIP, even for endpoints that are not IP telephones.

- **PC:** Proactive Contact. The Avaya Proactive Contact dialer is an outbound platform for creation and management of outbound and blended phone campaigns and customer communications.

- **TSAPI:** Telephone Services Application Programming Interface. Avaya TSAPI is the actual software that provides the call control events and metadata to Uptivity WFO.

- **S8300, S8500, S8700:** These are common models of Avaya PBX equipment.

Customer Responsibilities

You are responsible for supplying the physical and/or IP connection(s) to your telephone system, as well as any licensing required by Avaya. You may also be responsible for configuring Avaya system components to support the recording integration. See your specific integration in the Customer Integration Tasks section for additional information.

Avaya PC Dialer Integration Overview

The Avaya PC Dialer integration is designed to work with either TDM (using Ai-Logix cards), passive VoIP (using port mirroring), or active VoIP (using DMCC) as an audio source. Call control and metadata are provided by the Avaya Proactive Contact (PC) dialer.
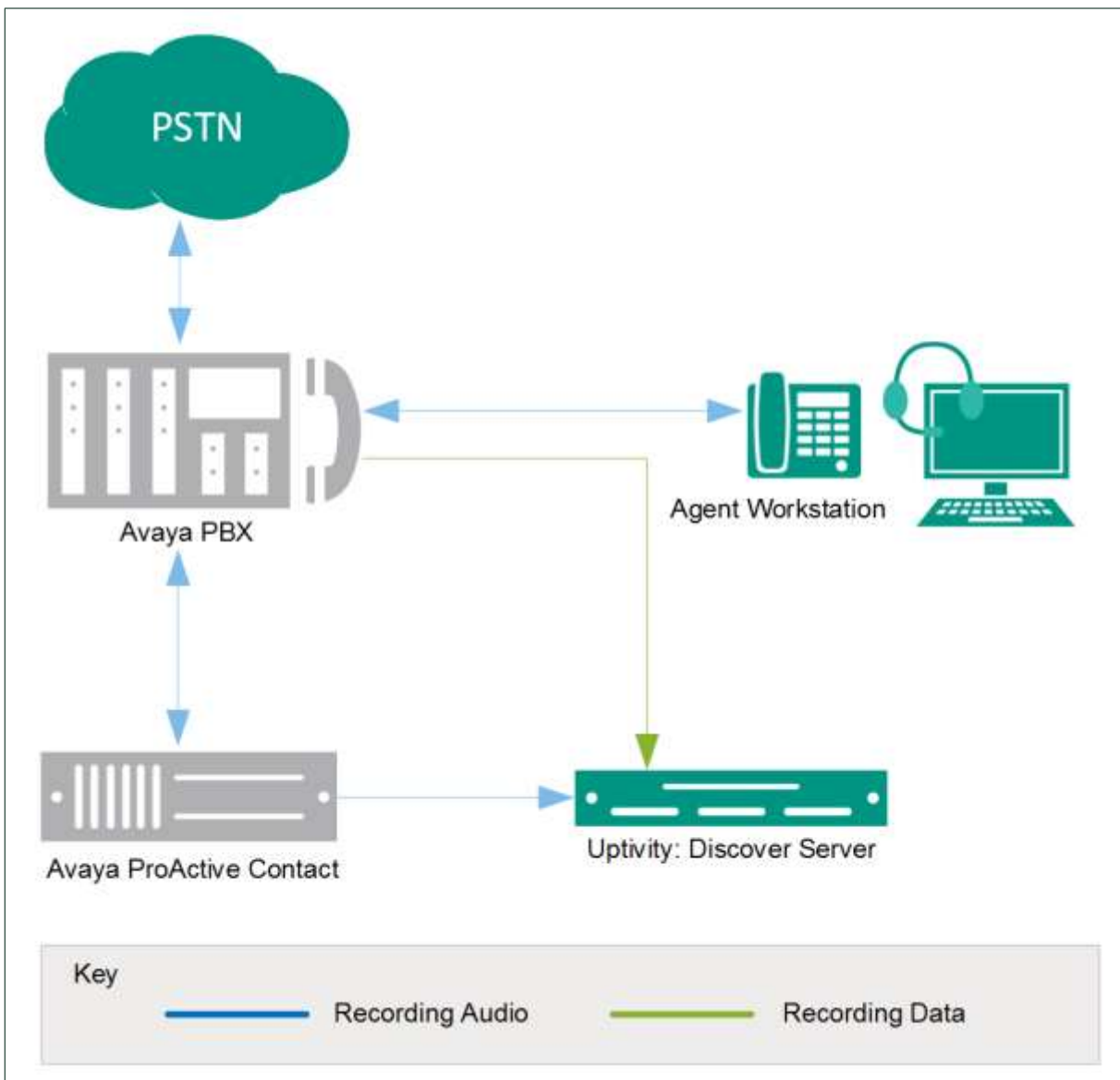
General architectural example of the Avaya PC Dialer integration; the audio source is not shown

Component	Function
Avaya PBX	PBX component that controls the audio being presented to and from digital and/or IP phones.
Avaya Proactive Contact	Dials outbound calls and receives inbound calls. Directs the PBX to connect calls to agents. Sends events (e.g., CALLCONNECT, CALLDISCONNECT) and other data (e.g., Agent ID) to Uptivity WFO Server.
Uptivity WFO Server	Provides an interface to the Uptivity WFO recording node to start/stop call recording. Generates call records in the Uptivity WFO database that store Agent ID and other information.

Avaya Requirements

Hardware and Software

- Avaya S8300, S8500, or S8700 PBX
- Avaya PC Dialer Release 5.1.1 or later

These requirements are in addition to the audio source requirements; refer to the relevant customer guide for details.

Port Usage

The **Avaya Name Service** runs on the Avaya PC. It negotiates initial set-up and informs client subscribers of the available services and API mapping.

- Non-SSL - default port 23200
- SSL – default port 23201

The **Avaya Event Service** runs on the Avaya PC. It sends dialer events to the subscribers.

- Non-SSL - default port 23120
- SSL - default port 23121

Software & Licensing

No additional software or licensing is needed.

Uptivity WFO Requirements

Hardware, Software, and Licensing

The Uptivity WFO hardware and software requirements are specified in the customer guide for the specific audio source integration. Those guides also explain the licensing requirements. No additional Uptivity WFO licensing is needed.

Port Usage

The **Uptivity Local Endpoint** on the Uptivity WFO recording server will receive local events. This default port is typically chosen by the operating system, but can be specified.

Customer Configuration Overview

The following table provides a high-level overview of the customer configuration steps in Avaya PC Dialer integrations. Links are provided for tasks that are covered in this guide.

Customer Configuration Steps for Avaya PC Dialer Integrations	
1	Perform any required configurations for the audio source integration. See the applicable document: *Uptivity WFO Customer Guide to Avaya DMCC-MR Integrations, Uptivity WFO Customer Guide to Avaya DMCC-SO Integrations, Uptivity WFO Customer Guide to Avaya DMCC-SSC Integrations, Uptivity WFO Customer Guide to Ai-Logix NGX Integrations*, or the *Uptivity WFO Customer Guide to Passive VoIP Recording*.
2	Enable SSL on the Dialer.
3	Obtain SSL Certificates for Uptivity WFO Server and provide them to your Uptivity WFO installation team.
4	Create a User Account for Uptivity WFO on the PC Dialer and provide the credentials to your Uptivity WFO installation team.

Customer Integration Tasks

The information in this section is provided for your reference only. Detailed steps for the Avaya configuration can be found in Avaya's documentation, which is available on the Avaya website or from your Avaya vendor. You should always use the appropriate manuals and/or guides from Avaya to install and configure Avaya components.

This section covers only procedures specific to the PC Dialer. Refer to the applicable customer guide for additional tasks required for the audio source integration.

Enable SSL on the Dialer

For this integration, you must enable SSL on the Proactive Contact dialer. To do so:

1. Log in to the Dialer server as **admin**.

2. From the command line, run the following commands:

   ```
   stop_pds

   stop_mts
   ```

3. Log in to the Dialer as **sroot**.

4. Execute the following command:

   ```
   ssl_conf
   ```

5. Type **y** to answer the message: "Do you want to turn off CORBA SECURITY?" When the script executes, the message displayed is "Turning on the CORBA SECURITY".

6. Log out of **sroot** and log in as **admin** again.

7. Execute the following commands:

   ```
   cd $TAO_DATA

   (To go to the /opt/avaya/services/data directory)

   rm *

   (To delete everything present in the /opt/avaya/services/data directory).

   go lists

   (To go to the /opt/avaya/pds/lists directory).

   rm .STATUSINFO.txt
   ```

8. Start the mts and pds processes by running the following commands:

```
start_mts

start_pds
```

9. To verify the health of all components after this procedure, wait for a few moments and then run the following commands:

```
check_db

check_mts

check_pds
```

After you complete this procedure, return to the Customer Configuration Overview.

Obtain SSL Certificates for Uptivity WFO Server

Avaya Proactive Contact validates incoming client certificates using Secure Socket Layer (SSL) protocol. You will need to copy several certificates from the Avaya server and provide them to the Uptivity WFO Installation team for loading on the Uptivity WFO server.

1. Log in to the Avaya PC server with an appropriately-permissioned account.

2. Browse to this directory: /opt/avaya/pds/openssl.

3. Copy the following files and provide them to your Uptivity WFO Installation team:

   ▪ /private/corbaServer_key.pem

   ▪ /certificate/corbaServer_cert.pem

   ▪ /cacertificate/ProactiveContactCA.pem

After you complete this procedure, return to the Customer Configuration Overview.

Create a User Account for Uptivity WFO on the PC Dialer

Uptivity WFO requires a user account on the Avaya PC Dialer in order to receive events. You will need to provide this account's username and password to your Uptivity WFO Installation team.

To create this account:

1. Log in to the Avaya PC Dialer as an administrator.
2. Select Administrative Tasks > Manage user accounts.
3. At the Manage user accounts prompt, enter **Y**.
4. Hold down the CTRL key and press L.
5. Enter a user name (case-sensitive)
6. Enter a password (case-sensitive).
7. For group, enter **system**.
8. Enter a description.
9. Hold down the CTRL key and press X to save the changes.

Customer Administration Tasks

During ongoing use of the system, your Uptivity WFO administrator may need to configure new channels or reconfigure existing channels. This section provides information needed to perform these integration-specific tasks.

Recording Administration for the Avaya PC-Dialer Integration

This integration can work with either TDM (using Ai-Logix cards), passive VoIP (using port mirroring), or active VoIP (using DMCC) as an audio source. If you add or reconfigure channels, you will need to follow any procedures specific to those audio sources as found in the appropriate customer guide: *Uptivity WFO Customer Guide to Avaya DMCC-MR Integrations, Uptivity WFO Customer Guide to Avaya DMCC-SO Integrations, Uptivity WFO Customer Guide to Avaya DMCC-SSC Integrations, Uptivity WFO Customer Guide to Ai-Logix NGX Integrations*, or the *Uptivity WFO Customer Guide to Passive VoIP Recording*.

You will also need to do the following in order to record calls generated specifically by the PC dialer:

- Add the agent's dialer login ID (AGENTNAME) to the Phones field whenever you configure a Uptivity WFO user account for an agent. For details, see the "Edit a User" section of the *Uptivity WFO Administration Manual*.

- Create a recording schedule specifically for recording these calls using the PC Dialer Agent Name and the Uptivity WFO script's Device Alias. For details, see the "Scheduling" section of the *Uptivity WFO Administration Manual*.

These actions are required because agents must log in to both the Avaya PC and the Avaya PBX/ACD, and the Avaya PC has an agent name and extension that differs from the Avaya PBX's agent name and extension. In some cases, the Uptivity WFO recording script may also require adjustment. Contact Uptivity WFO Support for assistance.

Document Revision History

Revision	Change Description	Effective Date
0	Initial version for this release	2015-04-30
1	Updated supported version of PC Dialer.	2015-09-14
2	Updated default Avaya port information.	2016-10-05