



## Upgrade Implementation Service Packages Offer Sheet

### CMS/BCMR Upgrades

#### CMS

Avaya Global Services offers three comprehensive services packages to cover the level of service required to upgrade a CMS Solution. All packages include out-of-hours.

The **Industry Standard Package** includes project management support and a site survey based on the specified deliverables. Avaya will also perform software programming, including system programming, and provide hardware implementation. All provisioning and hardware implementation services are provided out of hours.

The **Full Service Package** includes all of the activities listed in the Industry Standard package plus Data Migration, Network Printer, and Verification of up to 10 reports.

The **Premium Service Package** includes all of the activities listed in the Full Service package plus implementation for up to 8 ACDs, Work Force Management Real and Historical, and External Call History (ECH).

#### BCMR

Avaya Global Services offers two comprehensive services packages to cover the level of service required to upgrade a BCMR Solution. All packages include out-of-hours.

The **Industry Standard Package** includes project management support and a site survey based on the specified deliverables. Avaya will also perform software programming, including system programming, and provide hardware implementation. All provisioning and hardware implementation services are provided out of hours.

The **Full Service Package** includes all of the activities listed in the Industry Standard package plus BCMR Client Upgrade, BCMR Wallboard Customization Upgrade and BCMR Reports Training.

See grid under Offer Package Comparison for a complete list of deliverables.

### AVAYA DELIVERABLES

#### Project Management

Avaya will designate an individual responsible for overseeing the project. Once the contract is signed, this individual will be the single point of contact (SPOC) for all issues related to system implementation. The SPOC will direct implementation to support installation and the scheduled in-service date.

The Avaya project manager will:

- Project plan and milestone schedule
- Environmental specifications provided to Customer
- Hardware delivery and inventory coordination
- Change request management
- Routine project status meetings
- Project closure meeting

#### Solution Preparation

##### Site Survey

Avaya will work with Customer's single point of contact (SPOC) to complete a site survey prior to hardware delivery.

Site survey activities may include, but are not limited to, the following:

- Inspecting equipment room
- Verifying power requirements
- Checking other environmental specifications
- Validating wiring/terminations/demarcations

Customer will receive a list of deficiencies, if any, and will be informed of the Avaya site-readiness decision (go/no go).

**Note:** Avaya recommends a corruption check when the system upgrade or migration is being performed



on an R3V8 or an earlier CMS version. A typical corruption check takes thirty (30) minutes to complete and does not result in a loss of data. If Customer has an Avaya maintenance agreement, there is no charge for this service when performed by the TSO maintenance organization during Standard Service Hours, as defined in Section 3 (Standard Service Hours).

A corruption check is performed by the TSO maintenance organization at a larger call center may take more time to complete, in which case this service may be scheduled outside Standard Service Hours at an additional charge.

Activities may include, but are not limited to:

- ◆ Conduct discussion with Account Team regarding current contact center environment, and client goals and objectives for the Avaya solution.
- ◆ Gain a thorough understanding of the client's business strategy, goals, and expectations to maximize their investment.
- ◆ Review client prerequisites.
- ◆ Review any recent significant changes in traffic, staffing, or technology.
- ◆ Identify elements of existing contact center, contact center technology and operations to be evaluated.

## Solution Design & Development

### CMS Integration/Provisioning (required service)

Avaya will remotely install the operating system and CMS application on the specified CMS platform. This task includes:

- ◆ Automatic Call Distribution (ACD) setup
- ◆ Administration of customer-specific configuration
- ◆ Migrating admin data (upgrades only)
- ◆ Linking to PBX

LAN connectivity will be validated via "ping test" from the server to the default gateway assigned by Customer. Upon completion, the system will be released to Customer for site-specific administration and system setup.

Avaya will confirm and activate right-to-use (RTU) software licenses if applicable.

Activities may include, but are not limited to:

- ◆ Conduct discussion with Account Team regarding current contact center environment, and client goals and objectives for the Avaya solution.
- ◆ Gain a thorough understanding of the client's business strategy, goals, and expectations to maximize their investment.
- ◆ Review client prerequisites.
- ◆ Review any recent significant changes in traffic, staffing, or technology.
- ◆ Identify elements of existing contact center, contact center technology and operations to be evaluated.

### CMS Network Printer Interface

The CMS Network Printer Interface provides an application on the CMS to facilitate printing information from the CMS server to a TCP/IP network connected printers. Installation includes set-up of the interface and scripts to assist in administering the interface with TCP/IP network connected printers. At the time of software delivery, up to ten TCP/IP network connected printers may be administered at no additional cost.

NOTE: Purchase of these interfaces/packages includes the one time activation RTU cost. These applications are licensed and supported for the CMS hardware and CMS software version where originally installed. Upgrades or migrations to subsequent CMS versions will require re-authorization and are subject to a additional RTU cost. These interfaces are the intellectual property of Avaya and CSI and cannot be copied to other CMS servers by individuals outside of Avaya CSI.

### Avaya CSI Deliverables

Avaya will remotely:

- ◆ Work with Customer to identify all requirements.
- ◆ Work with Customer to develop project schedule.
- ◆ Download NWP interfaces and support scripts to Customer's CMS server.
- ◆ Administer up to 10 printers or printer/server combinations.
- ◆ Provide Customer with instructions for using printer administration scripts.

### CMS Data Migration

Avaya will assist customer with completing a full maintenance backup on the CMS server targeted for upgrade activity (this data is used during the actual migration).



- Complete the data migration from the target CMS server to the upgrade version or the new server.
- Assist customer in testing the interfaces, reports and data during and after the historical data migration is completed.
- Provide post-migration support if the customer has any problems or questions for 30 days.

**Note: Data Migration is included for up to the 10 reports that will be verified as part of the Upgrade Full Service and Premium packages. It also includes up to 4 (Full Service Upgrade) or 8 ACDs (Premium Upgrade) also included in these upgrade packages. Any additional migration work that is identified and required would be outside the scope of the CMS Upgrade Package Pricing.**

### Report Verification

Verify up to 10 reports.

### CMS Work Force Management (WFM)

Avaya CSI consultants offer interfaces for the CMS to offload real time and historical data from the CMS to several different Workforce Management (WFM) Interfaces. These interfaces include, but are not limited to:

- Blue Pumpkin
- GMT Planet
- IEX
- RightForce
- TCS
- Calabrio
- Pipkins
- CenterBridge

Avaya CSI provides pre-defined, formatted data to the specific vendor, per that vendor's requirements. Interface installation includes set-up for one ACD. Additional ACDs on the same CMS server will incur a nominal charge. The interfaces support up to 8 ACDs per CMS.

### Avaya CSI Deliverables

- Remote download via modem of the appropriate WFM to the customer Avaya CMS Server.
- The CSI Delivery Consultant, in agreement with the customer, will identify all specific requirements and schedule the dates for the WFM implementation.
- The CSI Delivery Consultant will configure the WFM software per customer provided input.

- The CSI Delivery Consultant will activate interface on the Avaya CMS to send data at regular intervals to the WFM server.

### Solution Components/Configuration

All data connections from the CMS server to the specific WFM server must be a LAN connection. We do not use serial connectivity for these applications. FTP is used to deliver historical data from CMS server to WFM server

This application is licensed and supported for the CMS hardware and CMS software version where originally installed. These interfaces are the intellectual property of Avaya and CSI and cannot be copied to other CMS servers by individuals outside of Avaya CSI.

### Customer Requirements

- CMS versions r3v9 and higher
- A signed Avaya CSI statement of work.
- WFM Server installed at customer location or a remote customer location connected by their internal WAN
- Remote access to CMS server
- IP Address for WFM server
- ACD number(s) to be configured
- Splits/Skills within ACD to be configured (usually this is all Splits/Skills)
- Intervals defined for historical data (15, 30 or 60 minute)
- FTP enabled on WFM server for historical data
- FTP login/password to the WFM server provided to delivery consultant for setup of historical interface

This offer provides the interfaces required for the Avaya CMS to offload External Call History (ECH) data from the CMS to a specific server defined by the customer. The offloaded ECH data can be in either binary format or ASCII format (additional charges apply for ASCII format). This feature and service is essential for the implementation of various solutions such as CentreVu Explorer and Nice Analyzer.

### CMS External Call History (ECH) Configuration and Implementation

This application is licensed and supported for the CMS hardware and CMS software version where originally installed. These interfaces are the



intellectual property of Avaya and CSI and cannot be copied to other CMS servers by individuals outside of Avaya CSI.

### Avaya CSI Deliverables

- Remote download via modem of the appropriate ECH package to the "customer" Avaya CMS Server.
- The CSI Delivery Consultant, in agreement with customer, will identify all specific requirements and schedule the dates for the ECH software and script installation.
- The CSI Delivery Consultant will install and configure the ECH interface with customer provided input.
- The CSI Delivery Consultant will activate the interface on the Avaya CMS to send data to the ECH server.

**Note:** ECH data in ASCII format is not included in the CMS Upgrade Package pricing.

### Customer Pre-Qualifications

- CMS versions r3v9 and higher with the ECH feature authorized by CMS Provisioning
- Remote access to the CMS Servers.
- A signed Avaya CSI statement of work.
- Details of the delivery server including IP address which must be accessible from the CMS server.
- FTP information including a username / password and directory.

#### Notes:

- The data specifications can be found in the ECH manual at <http://support.avaya.com> for the specific CMS version you are working with.
- Data collection must be stopped in order to install ECH. Usually the interruption will only be 15 minutes. If this it to be done out of hours, additional premium charges will apply.
- All data connections from the CMS server to the specific ECH server must be a LAN connection. We do not use serial connectivity for these applications. FTP is used to deliver ECH data from CMS server to ECH server

## Solution Deployment

### CMS Hardware Installation

Avaya will perform the upgrade by installing the new software and hardware, if applicable, according to

client specifications. If Avaya equipment is being upgraded, Avaya will first uninstall the old equipment, perform data migration if necessary, and install the new system, utilizing any reusable equipment. Note: Customer will be responsible for any non-Avaya equipment used in the new system.

Customer will be responsible for:

Performing administrative (CMSadm) and full maintenance backups to CMS within 48 hours of upgrade

Providing resource to update CMS Supervisor software on all applicable PCs.

Avaya will:

- Coordinate Customer installation of the pre-assembled and loaded CMS processor, associated peripherals, and link wiring from the switch to the processor.
- Unpack hardware and remove all packing materials.
- Place, test and connect all Avaya-provided systems.

### BCMR Upgrade Activity

Avaya will send BCMR checklist requirements to Customer when provisioning is scheduled. Once Customer has met these requirements, Avaya will perform the upgrade by installing the new BCMR server and client software on the new BCMR server PC, according to client specifications. Avaya will also verify system operation by pulling up real-time and historical reports via the client application installed on the BCMR server.

### CMS Upgrade Activity

Customer will be responsible for:

- Performing administrative (cmsadm) and full maintenance backups to CMS within 48 hours of upgrade.
- Providing resource to update CMS Supervisor software on all applicable PCs.

### BCMR Upgrade Activity

Customer will be responsible for:

- Meeting BCMR checklist requirements and returning signed checklist to Avaya
- Data migration from previous BCMR server, if applicable

## Customer Responsibilities

### Solution Design & Development

#### CMS

##### System Requirements

Prior to CMS installation, customer will be required to provide:

- ♦ Modem dial-up number for the CMS
- ♦ Installation of new version of CMS Supervisor on desktops.
- ♦ Provide IP address information and physical connectivity to LAN for CMS.
- ♦ Provide IP address information and physical connectivity to LAN for Clan Card (for each PBX the customer needs to connect to)

#### BCMR

##### System Requirements

Prior to BCMR installation, Customer will be required to provide:

- ♦ Analog station line from DEFINITY system, if using DID extensions, or central office line for remote maintenance and training using pcAnywhere software
- ♦ PCs
- ♦ Modems (14.4 Kbps or faster)
- ♦ TCP/IP LAN network

**Note:** If Customer purchases a single-user license, the BCMR client software may be loaded on the same PC used for the server. Instead of LAN connectivity, the TCP/IP protocol and Microsoft networking, using a Microsoft loopback adapter or a network interface card, will be required.

#### Network Printer Interface

Customer will be required to:

- ♦ Run CMS R3V9 or higher on target Avaya CMS server.
- ♦ Ensure that static TCP/IP addresses are assigned to printers on TCP/IP network or their controlling print server **or** provide connectivity to DNS to resolve printer names to current TCP/IP addresses.
- ♦ Ensure that printers on TCP/IP network can print using HP Printer Control Language (PCL).

- ♦ Provide TCP/IP address and name for each printer or printer/server combination to be administered by Avaya.  
Provide valid recognized printer host name for each DNS printer to be administered by Avaya.

### Work Force Management (WFM)

Customer will be required to:

- ♦ Run CMS R3V11 or higher.
- ♦ Arrange for installation of WFM server at Customer's local site **or** at remote site connected by Customer's internal WAN.
- ♦ Provide TCP/IP address for WFM server.
- ♦ Provide ACD number(s) to be configured.
- ♦ Provide ACD splits and skills to be configured.
- ♦ Provide time intervals used by Customer to define categories of historical data.
- ♦ Ensure that FTP is enabled on WFM server for use in transferring historical data files.
- ♦ Provide WFM server's FTP login ID and password so that delivery consultant can set up interface for historical data.

**Note:** Serial connectivity is not available for these applications. Customer must use a LAN connection to transmit historical data from Customer's CMS server to the WFM server.

### External Call Handler (ECH)

Customer will be required to:

- ♦ Run CMS R3V11 or higher with ECH feature authorized by CMS Provisioning.
- ♦ Provide delivery server information including IP address, which must be accessible from Customer's CMS server.
- ♦ Provide FTP information including user name, password and directory.
- ♦ Ensure that Customer's CMS server and ECH server are connected by LAN.

### BCMR Client Installation

Customer's LAN administrator will be required to load BCMR client software on any additional Supervisor PCs.

### BCMR Wallboard Customization

Customer's LAN administrator will be required to load BCMR client software on any additional Supervisor PCs.

### Solution Deployment

### BCMR Hardware Installation



Customer will be responsible for:

- ♦ Meeting BCMR checklist requirements and returning signed checklist to Avaya
- ♦ Installing BCMR server
- ♦ Establishing connectivity between PBX and BCMR server

## Key Benefits

Integrating and evaluating the application of new technology is our success proposition for our customers. Avaya ability to surround technology with global consulting services helps our customers achieve maximum performance from their Avaya Contact Center solution.

Our Contact Center offers are designed to meet customer needs and to help confirm business profitability by:

- ♦ Faster implementation of technology to match business objectives
- ♦ More informed and better educated staff, resulting in increased supervisor/agent productivity and technology acceptance
- ♦ Successful implementation of emerging technology and benchmark standards
- ♦ Ability to integrate various technology components into a solution
- ♦ Access new technology with cost effective systems integration and expert training

## Project Management

Project Management services help speed network implementation – and thus, revenue flow – by monitoring critical time frames and effectively managing changes to help ensure timely deployment. Project Managers manage all your requirements and act as a single point-of-contact that coordinates all Avaya resources to meet your needs. By managing a comprehensive implementation project schedule and monitoring critical milestones, Project Management makes certain the solution is implemented according to plan and minimizes the risk of delays and additional costs.

## Solution Design & Deployment

The Solution Design and Development services begin by identifying client expectations and helps define anticipated outcomes for the project. By gaining a

thorough understanding of the client's business strategy, goals, and expectations, Avaya is better positioned to maximize the outcome of the solution deployment.

Avaya associates design and deliver a solution tailored to meet client specific requirements.

- ♦ Providing an overview of what they purchased.
- ♦ Providing a detailed overview of the features and functionality of the newly implemented Contact Center.
- ♦ Providing business specific consulting customization.

## Solution Deployment

Solution Deployment services deliver the complete physical hardware and/or software installation of the solution as well as the placement, testing, and verification of system operation. Avaya provides resources and expertise to manage the integration quickly and reliably so that your staff can focus on managing your business. Avaya minimizes the technical problems associated with integrating complex networks with new state-of-the-art technology to reduce solution integration intervals and minimize disruption to your new or existing networks.

- ♦ Customer receives assured completeness of the new working Contact Center Services.
- ♦ Customer has a live consultant On-Site during cutover to assure proper functioning of all features and functions.
- ♦ Customer receives assurance of any feature and or function errors.
- ♦ Customer receives proper signoff when job is complete.

## Education & Knowledge Transfer Services

Our education and knowledge transfer services provide our clients the tools and understanding needed to continue to monitor, gather, interpret, troubleshoot, and utilize Contact Center performance results after integration. These services help to integrate the Avaya contact center solution into the standard operations of the client's environment.

Please refer to Customer/Business Partner's agreement with Avaya for Customer/Business Partner responsibilities as well as contractual obligations pertaining to Installation and Implementation Services.



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## Package Comparison

<b>Services and Deliverables</b>	<b>Upgrade - CMS</b>		
	<b>Industry Standard</b>	<b>Full Service</b>	<b>Premium Service</b>
<b><u>A 1.1 Project Management</u></b>			
Project Management	x	x	x
<b><u>A 1.2 Solution Preparation</u></b>			
Site Survey	x	x	x
<b><u>A1.3 Solution Design and Development</u></b>			
Integration/Provisioning (Up to 4 ACDs)	x	x	x
Provisioning Up To 8 ACDs			x
Data Migration		x	x
Network Printer Interface		x	x
Report Verification Up to 10 Reports		x	x
Work Force Management Real-Time and Historical			x
External Call History (ECH)			x
<b><u>A1.4 Solution Deployment</u></b>			
CMS Hardware Installation	x	x	x
Platform Upgrade and Configuration	x	x	x

<b>Services and Deliverables</b>	<b>Upgrade - BCMR</b>	
	<b>Industry Standard</b>	<b>Full Service</b>
<b><u>A 1.1 Project Management</u></b>		
Project Management	x	x
<b><u>A 1.2 Solution Preparation</u></b>		
Site Survey	x	x
<b><u>A1.3 Solution Design and Development</u></b>		
Integration/Provisioning (Up to 4 ACDs)	x	x
BCMR Client Installation		x
BCMR Reports Training		x
BCMR Wallboard Customization		x
<b><u>A1.4 Solution Deployment</u></b>		
BCMR Hardware Installation	x	x
Platform Upgrade and Configuration	x	x
<b><u>A 1.5 Knowledge Transfer</u></b>		
BCMR Reports Training		x

### Standard Service Hours

Work activities that do not affect service, excluding cutover support, will be performed and completed during Standard Service Hours, as defined under Standard Service Hours.

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Use pursuant to the terms of your signed agreement or Avaya policy.

Expires 11/03/08



Pricing is based on the assumption that Services will be performed between 8:00 AM and 5:00 PM local site time, Monday-Friday, excluding Avaya-designated holidays (“Standard Service Hours”) unless otherwise stated. Work performed outside Standard Service Hours may be subject to overtime charges at the following rates:

Overtime (1.5 times)	Premium Overtime (2.0 times)
Evenings, Monday-Friday 5:00 PM-8:00 AM	Saturday 12:00 AM (midnight)–Monday 8:00 AM
Saturday, 8:00 AM–12:00 AM (midnight)	Avaya-designated holidays

### Standard Delivery

The Avaya project manager and software resource will deliver services remotely.

### Travel and Living Expenses

If on-site support is required, the cost of travel will be billed to the customer. Avaya will present an estimate of travel and living expenses for approval in advance if requested. Once approved, arrangements will be secured and actual charges will replace the estimated costs and billed to the customer.

### Availability

This offer is available in the US through Avaya direct and indirect sales channels. For availability outside the US, check with Avaya Global Services in the appropriate country or region.

### How to Engage Avaya Consulting and Systems Integration (CSI)

This Offer Sheet is not to be used for Contractual purposes. To engage the ATAC Design Central team, for pricing, please pursue the following steps for a quote.

For Direct requests: Go to Avaya Enterprise Portal, Tools, Sales Tools, Siebel Sales

For Indirect requests:

BusinessPartners can order these services by contacting their Distributor. Distributors will submit an ORS request on behalf of the BusinessPartner and provide pricing and due dates accordingly.

BusinessPartners/Distributors can order Incidental Services through the Incidental Tool.

Incidental Services are defined as noncomplex activities (material codes) based on fixed pricing, with clearly defined Avaya deliverables, and no associated customized SOW.

Utilizing the Incidental Process allows submitters to bypass the existing ORS process. The tool is posted on the Enterprise Portal and can be found by following the path outlined below:

Enterprise Portal>Under Manage select: Global Services Reference Library>Tools>Tools>Scroll Down to CSI>CSI Incidental/Transactional Job Aid

If you have any additional questions, please contact Diane Williams, CS&I Offer Manager, at 407-384-1328 or [di@avaya.com](mailto:di@avaya.com).

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