

Avaya Solution & Interoperability Test Lab

# Application Notes for Resource Software International Visual Rapport with Avaya IP Office – Issue 1.0

## Abstract

Resource Software International Visual Rapport is a visual communication console application that provides telephone features, telephone status, and screen pop capabilities at the extension user's client computer. These Application Notes describe the configuration steps required for Visual Rapport features such as Answer, Hang Up, Hold, Transfer, Park, and screen pop, to interoperate with Avaya IP Office systems.

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 Resource Software International (RSI) Visual Rapport to work with Avaya IP Office. Visual Rapport is an integrated visual communication console application that provides real-time telephone status, telephone feature dialing, and screen pop capabilities, under one application.

Visual Rapport makes call handling simple. Visual Rapport can perform time-consuming telephony functions (including Call, Answer, Hold, Park, and Transfer) with a few mouse-clicks. When an incoming call arrives, Visual Rapport can unobtrusively display the incoming Caller ID information and allows for a decision to be made about the call.

Using Visual Rapport, incoming calls can be linked with information that exists in a database or contact management applications, such as Access, Outlook, Act!, Maximizer, Goldmine or a custom application. As an example, a travel agency with a proprietary customer database could use Visual Rapport to receive screen pops at every agent's desktop and access the details of each customer's travel plans from the Visual Rapport database.

Visual Rapport consists of a server module and a client module. Each Visual Rapport client interfaces with Avaya IP Office via TAPI 1<sup>st</sup> party call control, and in this case connects a telephone directly to a PC. The Avaya IP Office TAPI driver must be installed on the Visual Rapport client PC to establish the connection to Avaya IP Office for the extension to be controlled by the Visual Rapport client.

The Visual Rapport clients also connect to the Visual Rapport server. The Visual Rapport server, with its Directory Services facilities, authenticates each Visual Rapport client and manages the data exchange between the Visual Rapport clients on the network. Communication between the Visual Rapport clients and server can be accomplished by multicasting or broadcasting. For the purposes of these Application Notes, the Visual Rapport clients and server were configured with broadcasting.

The configuration in **Figure 1** shows a network consisting of Avaya IP412 Office, Avaya IP406 Office V2, Avaya IP Office Manager PC, Visual Rapport server and clients connected to the various networks. Avaya IP412 Office has PRI and Analog trunks to the central office. Avaya IP406 Office V2 can also access the central office facilities over the Small Community Network (SCN). Avaya IP Office SCN networks allow dial plan information to be share between Avaya IP Office systems. SCN networks are also used to collectively ring extensions across two (or more) Avaya IP Office systems by dialing a single hunt group extension. For example, an incoming PRI call was routed to ring hunt group extension 55440 in this configuration. As a result, all three Visual Rapport clients described in **Figure 1** are alerted.

Each of the Visual Rapport clients in **Figure 1** is configured with TAPI 1<sup>st</sup> party call control connectivity to Avaya IP Office and is registered to a distinct Avaya IP Office extension. Refer to **Table 1** for the mapping of extensions to Visual Rapport clients and to Visual Rapport login user IDs.

Client	Avaya IP Office Extension	Visual Rapport Client User ID
Visual Rapport Client 1	55262	John Smith
Visual Rapport Client 2	55263	Tim Smith
Visual Rapport Client 3	45320	John Adams

#### Table 1 – Client/Extension/User ID Mapping

The tested configuration is shown in Figure 1.



Figure 1 – Network Configuration Diagram

Avaya IP412 Office system was configured to route incoming calls to hunt groups or specific extensions, based on the test case being executed. For an incoming trunk call, Avaya IP412 Office routed the call to the destination extension. While this event occurred, Avaya IP Office also sent TAPI 1<sup>st</sup> party call control signaling to the Visual Rapport client associated with the destination extension. The user then received visual notification of the incoming call from the Visual Rapport client in addition to the audible notification from the telephone. The Visual Rapport client could be configured to take different actions during an incoming call. For the purposes of compliance testing, one of the three Visual Rapport clients was configured to generate a screen pop after two seconds, when an incoming call was answered at that extension. For example, when receiving an incoming call, the Visual Rapport client assigned to extension 55263 was setup to launch Microsoft Notepad and immediately display the caller's information (**Section 5.2.1**).

## 2. Equipment and Software Validated

The following products and software were used for the configuration in **Figure 1** Figure 1:

Product	Software/Version
Avaya IP412 Office	4.0.10
Avaya IP406 Office V2	4.0.10
Avaya IP400 Phone Module	6.0.10
Avaya IP400 Digital Station Module	6.0.10
Avaya IP Office Manager	6.0.10
Avaya 4620SW IP Telephone	2.3
Avaya 5620SW IP Telephone	2.3
Avaya 2420 Digital Telephone	5.0
Avaya 5420 Digital Telephone	5.0
Visual Rapport server	2.08
Visual Rapport client	2.08
Avaya C364T – PWR Converged Stackable Switch	4.5.14
PCs for Avaya IP Office Manager and Resource	Windows 2003 XP
Source International Visual Rapport server and	Professional Service Pack 2
clients	

#### Table 2 – Product and Software Version

## 3. Configure Avaya IP Office

The configuration information provided in this section describes the steps required to set up user extensions and passwords on Avaya IP Office. While this is part of a typical Avaya IP Office configuration, the information is needed for the TAPI driver configuration on the Visual Rapport clients.

For other information, such as Avaya IP Office installation and configuration, etc., please refer to the Avaya IP Office product documentation in Reference [1]. Except where noted, similar configurations are performed on each Avaya IP Office systems.

- From the Avaya IP Office Manager PC, go to Start → Programs → IP Office → Manager to launch the Avaya IP Office Manager application. Log into the Avaya IP Office Manager application using the appropriate credentials.
- 2. In the Avaya IP Office Manager window that is displayed (not shown), select File  $\rightarrow$  Open to search for the IP Office system in the network. Select Avaya IP412 Office.
- 3. Log into the Avaya IP412 Office system using the appropriate login credentials to receive its configuration.
- 4. In the Avaya IP Office Manager window, go to the configuration tree in the left-hand panel and right-click Line and select  $New \rightarrow IP$  Line (not shown). The screen below should display.

In this case, the system automatically assigns 15 as the Line Number (this will vary). Place the value 15 in the Incoming Group ID and Outgoing Group ID fields. Click the VoIP Settings tab.

Edit       Yew       Tox       194124anl       Line       12         IP Offices       Line       IP       P-Line 15*       IP       IP<	🚹 Avaya IP Office Manager 6.	.0 (10) IP412-Lan1 [4.0(10)] [Adr	ninistrator(Administra	tor)]	
P Offices     Line     12       P Offices     Line     P-Line 15*       Operator (3)     Immunder     Ine Yunk       P Operator (3)     PR124     PRI       P Operator (3)     Prime     Immunder       P Operator (3)     Prime       P Operator (3)     Primak       P Op	<u>File E</u> dit <u>V</u> iew <u>T</u> ools <u>H</u> e	lp.			
IP Offices       Line       Image: Comparison of the	: 2 🖻 - 🖬 🖃 🖻 🗚	✔ 🎂   IP412-Lan1 🛛 💽 I	ine	• 12 •	
Work (1)       Une Number       Line Type       Line Stort Code       VolP Line       Stort Code       Stort Code       Stort Code       Stort Code       Stort Code       Stort Code	IP Offices	Line	12	IP - Line 15*	<b>☆</b> -   ×   ✓   <   >
QK         Cancel         Help	BOOTP (2) Operator (3) PH12-Lan1 System (1) Control Unit (4) Extension (83) User (85) Hunkforoup (2) Service (0) RAS (1) Directory (0) Directory (0) Time Profile (1) Firewall Profile (1) Firewall Profile (1) Control Route (1) Licence (45) User Rights (8) KaS (1) E911 System (1) E911 System (1)	Line Number Line Type Line S. 1 PR124 PR1 2 PR124 PR1 1 PR124 PR1 1 PR124 PR1 1 PR124 PR1 1 PR124 PR1 1 SIPLINE 1 Analogue Trunk 1 SIPLINE 1 SIPLINE 1 SIPLINE 1 SIPLINE 1 Analogue Trunk 1 Analogue Trunk	VoIP Line Short Codes V Line Number Telephone Number Incoming Group ID Prefix National Prefix International Prefix	oIP Settings	<u>Sk</u> Čaucej Fielo

5. Set the **Gateway IP Address** to the IP address of the other Avaya IP Office System (see **Figure 1**). Check the **Voice Networking** check-box. The **Voice Networking** parameter turns on SCN capabilities. Click **OK**.

**Note**: The IP address will be different when administering the other Avaya IP Office system.



6. Select **User** on the left-hand panel configuration tree. In the **User** list displayed, scroll down and select the user and extension name mapped to the first Visual Rapport client listed in **Table 1**. Assign a password to the **Password** field for this extension. Record the name and password associated with this extension as this information will be required in **Section 5.2**. Click **OK**.

**Note**: Extension numbers will be different when administering the other Avaya IP Office system

🜃 Avaya IP Office Manager 6.0 (1	0) IP412-Lan1 [4.	O(10)] [Administrate	or(Administrator)]		
<u>File E</u> dit <u>V</u> iew <u>T</u> ools <u>H</u> elp					
i 🚨 🗃 - 📓 🖪 🔜 🗘 🗸	1P412-Lan1	💌 User	<ul> <li>55262 John S</li> </ul>	mith 🔹	
IP Offices	U	ser	E	John Smith: 55262	<b>⊡</b> * •   <b>X</b>   <b>√</b>   <   >
<ul> <li>BOOTP (2)</li> <li>♀ Operator (3)</li> <li>♀ IP412-Lan1</li> <li>♀ System (1)</li> <li>← (1 line (28)</li> <li>← Control Unit (4)</li> <li>♀ Extension (83)</li> <li>↓ User (65)</li> <li>♀ Fixtension (28)</li> <li>↓ Service (0)</li> <li>♀ Fixter (0)</li> <li>♀ Fixter (0)</li> <li>♀ Fixter (0)</li> <li>♥ Fixter (1)</li> <li>♥ Fixter (2)</li> <li>♥ Fixter (1)</li> </ul>	Name           Extn55259           Extn55260           Extn55261           Extn55264           Extn55265           Extn55266           Extn55266           Extn55266           Extn55266           Extn55268           Extn55269           Extn55270           Extn55271           Extn55273           Extn55274           Extn55276           Extn55276           Extn55276           Extn55276           Extn55276           Extn55276           Extn55276           Extn55276           Extn55276           Extn55301           Extn55302           Extn55325           John Smith           RemoteManager           Room 101           Room 103           Room 103           Room 104           Tur Smith	Extension ▲	Button Programming Menu Pro Announcements SIP User Voicemail DND Sho Name Password Confirm Password Full Name Extension Locale Priority Device Type User Rights User Rights view Working hours time profile Working hours time profile Working hours User Rights Out of hours User Rights	gramming Twinning T3 Options Phone Manager C rtCodes Source Numbers Telephony Forwarding John Smth **** **** 55262 5 EX Directory Avaya 5410 User data 	pptons Hunt Group Membership Dial In Voice Recording
Ready					,_;;

7. Repeat Step 4 for the remaining extensions listed in Table 1.

8. Select License on the left-hand panel configuration tree. Check that License Type is set to Advanced Small Community Networking license is installed and License Status is set to Valid. Note: This license is required for multiple system hunt group capabilities and needs to be installed on all participating Avaya IP Office systems.

**Note:** The compliance tests were performed using SCN trunks, where the dial plans and hunt groups were shared. If SCN hunt group functionality is not required, or where only one Avaya IP Office system is available, this license is not necessary.

🖬 Avaya IP Office Manager 6.	0 (10) IP412-Lan1 [4.0(10)] [Adminis	trator (Administrator)]
<u>File Edit View Iools H</u> el;	p	
i 2. 16 - 11   - 11 🖸 🖬 🔺	V 🔤 🕴 IP412-Lan1 🔹 Licence	e Advanced Small Community I
IP Offices	Licence	📒 🛛 Advanced Small Community Networking 🛛 📸 🗸 🗸 🔍
<ul> <li>BOOTP (2)</li> <li>Operator (3)</li> <li>Operator (3)</li> <li>System (1)</li> <li>Control Unik (4)</li> <li>Extension (83)</li> <li>User (85)</li> <li>HuntGroup (14)</li> <li>Short Code (67)</li> <li>Service (0)</li> <li>RAS (1)</li> <li>Incoming Call Route (7)</li> <li>WanPort (0)</li> <li>Time Profile (1)</li> <li>Preceder (1)</li> <li>Account Code (1)</li> <li>Licence (4)</li> <li>Licence (4)</li> <li>Licence (4)</li> <li>Licence (1)</li> <li>Licence (1)</li></ul>	Licence Type	Licence Key a319yrvOENUJGIJSA4785P5bCPc6vP7Q Licence Type Advanced Small Community Networking Licence Status Valid Instances 255 Expiry Date Never
Sent 100% of IP412-Lan1		

9. Create a hunt group by right-clicking on HuntGroup on the left-hand panel configuration tree and select New (not shown). On the right-hand panel, enter a Name for the hunt group. In the Extension field, enter the extension assigned to the hunt group. Click on the Add... button and select the extension members from the extension list (not shown). In this case, the name of the hunt group is VRapport, the hunt group extension is 55440 and the member extensions are 55262, 55263, and 45320. Click OK.

**Note**: Hunt group administration does not need to be performed on the other Avaya IP Office system.

👫 Avaya IP Office Manager 6.	0 (10) IP412-Lan1 [4.0(10)] [Adm	inistrator(Administrator)]					×
File Edit View Tools Hel	p						
	✓  IP412-Lan1 ▼ H	untGroup 5	5440 VRapport				_
BOOTP (2)	System Name Name Extension	Hunt Group Voicemail Fallba	ack Queuing Voice Recording	Announceme	40 III	<-   <b>X</b>   <b>V</b>   <	
<ul> <li>Operator (3)</li> <li>IP412-Lan1</li> <li>System (1)</li> </ul>	IP412Main         55200           VRapport         55440	Name	VRapport		Overflow Time (secs)		
-FR Line (28)		Extension	55440		No Answer Time (secs)		
Extension (83)		- Ring Mode			Voicemail Answer Time (secs)	45	
HuntGroup (2)		<ul> <li>Collective</li> </ul>	O Sequential	🔵 Rotary	🔘 Longest W	aiting	
RAS (1)		Agent's Status on No-Answer Annlies To	None	~	Call Waiting On		
WanPort (0)		Central System	IP412-Lan1		Advertise Group		
		Extension List		Overflow	/ Group List		
Firewall Profile (1)		Extension Name	System	Group	Name		Ш
In Couse (1)     In Couse (1)     Licence (45)     User Rights (6)     Ver Rights (		IV 55262 John Smith IV 55262 Tim Smith IV 45320 John Adams	Add Remove		Add	Remove	
					QK	⊆ancel <u>H</u> elp	
Ready							].::

- 10. In the Avaya IP Office Manager window, select File  $\rightarrow$  Save to push the configuration to the Avaya IP Office system and wait for the system to update.
- 11. Repeat **Steps 1 8** and **10** on the Avaya IP406 Office V2 system. This completes configuration of Avaya IP Office.

# 4. Configure Resource Software International Visual Rapport Server

The configuration information provided in this section describes the steps required to configure user accounts in the Visual Rapport server. Only one Visual Rapport server is required within the infrastructure and the Visual Rapport client can be co-located as illustrated in **Figure 1**. This information is provided for completeness since the Visual Rapport server does not interface with Avaya IP Office.

For all other provisioning information, such as software installation, installation of optional components, general configuration of Visual Rapport server, please refer to the Visual Rapport product documentation in References [2] and [3].

The information provided in this section assumes the Visual Rapport server has already been successfully installed and licensed on the PC.

- 1. Log into the Visual Rapport server PC with the appropriate administrative credentials.
- 2. Launch the RSI Visual Rapport Server application from the short-cut installed on the Windows desktop. In the **RSI Visual Rapport Server** window, click the switch icon to turn off the Communication Services.

🗃 RSI Visual Rapport Server	
File Tools Help	
Communication Services are currently: OFF	J

3. In the **RSI Visual Rapport Server** window, select **Tools**  $\rightarrow$  **Directory Services...** 



4. In the RSI Visual Rapport Server – Directory Services window that is displayed, click the imes in the left-hand panel, enter a Group Name (in the top left corner of the window), and then click imes to save the information. In this case, the group name created is Tools. Click the imes in the right-hand panel, set the Extension to 55262, User Id to JohnSmith, and the Password to the password defined in Avaya IP Office Manager. The Administrative Group name is the same as Group Name defined above.

💣 RSI Visual Rapport Server -	Directory Servic	es					(	- 🗆 🛛
Group Name	User Id	Family Name	Given Name	Nick Name	Email	TAPI	Extension	Last Update
1 Tools	▶ JohnSmith	Smith	John	John Smith	jsmith@abcdef.com	X	55262	12/31/2007
	* 0000000							
								>
	- <b>+</b>		_					د
User Account Details Visible Extensio	on List							
Extension: 55262 User Id:	JohnSmith	Pas	sword:		Confirm: ****	]		
Administrative Group:	Tools	8	Display National Statement Provide Statement	me: John Smith		]		
Given Name:	John		Family Na	me: Smith				
Email:	jsmith@abcdef.com	i				]		
Comment:								
			12-					
	Insta-Messaging	Enabled	Allo	w Privacy	Monitored			

- 5. Repeat Step 4 for the remaining clients listed in Table 1. When done, close the window.
- 6. In the RSI Visual Rapport Server window, select Tools  $\rightarrow$  Options... (see Step 3).

 In the Options window that is displayed, make a note of the Server Port(s) and Client Port(s) settings on the Communications tab as it will be referenced in Section 5.2. Check the Use Broadcast Communications check box. Select the Server Identification tab.

ptions	Converting Material Control Converts Taken CDD
Communications	Server Identification       Administrative Contact       Security       Telnet CDR         munications       Multicast Communications (Group Address):
Tinternet Pro	tocol Status OK Cancel

8. In the Server Identification tab window that is displayed, make a note of the Name, **Description** and **Network** information entered as it will be referenced in Section 5.2. Click OK. This completes configuration of the Visual Rapport server.

Options				
Communications	Server Identification	Administrative Contact	Security Telnet CD	)R
Name:	REBEL			
Description:	RSI Visual Rapport Ser	ver		
Network:	NODE-001			
😙 Internet Pro	otocol <u>S</u> tatus			OK Cancel

## 5. Configure Resource Software International Visual Rapport Client PC

The configuration information provided in this section describes the steps required to configure the Visual Rapport client PC.

For all other provisioning information, such as software installation, installation of optional components, configuration of the Visual Rapport client software to integrate with other 3<sup>rd</sup> party products, etc., please refer to the Visual Rapport product documentation in References [2] and [3].

#### 5.1. Install and Configure Avaya TAPI Driver

- 1. Log into the Visual Rapport client PC with administrative privileges and launch the Avaya IP Office User Suite installer.
- 2. Click **Next** in the InstallShield wizard until the **Select Components** window is displayed. Check **TAPI** to install the Avaya IP Office TAPI driver on the PC. Click **Next** >.

InstallShield Wizard	X
Select Components Choose the components Setup will install.	
Select the components you want to install, and clear the clinitall.	components you do not want to Description TAPI system driver.
Space Required on C: 3564 K Space Available on C: 13187792 K InstallShield	
< <u>B</u> ac	k <u>N</u> ext > Cancel

- 3. Click **Finish** (not shown). This completes the installation of the Avaya IP Office User Suite.
- 4. Go to Start → Control Panel and double-click Phone and Modem Options in the Control Panel window that is displayed.

5. In the Phone and Modem Options window that is displayed, select the Advanced tab.

hone and Modem Options	?
Dialing Rules Modems Adva	nced
The list below displays location from which yo	: the locations you have specified. Select the ou are dialing.
Location	Area Code
O My Location	732
<u>ŀ</u>	<u>J</u> ew <u>E</u> dit <u>Delete</u>
	OK Cancel Apply

6. In the Advanced tab window that is displayed, highlight Avaya IP Office TAPI2 Service Provider and click Configure...



Solution & Interoperability Test Lab Application Notes ©2008 Avaya Inc. All Rights Reserved. 7. On the Avaya TAPI2 configuration window that is displayed, set Switch IP Address to the IP address of Avaya IP Office, select Single User, set User Name to the name associated with the extension that will be controlled by this Visual Rapport client PC, e.g., John Smith and set User Password to the password set for the user in Section 3 Step 4. Click OK.

vaya TAPI2 confi	guration	
Switch IP Address	10.40.1.1	OK Cancel
User Name User Password	John Smith	
O Third Party		
Switch Password	Ex Directory Users	

- 8. In the Phone and Modem Options window, click OK.
- This completes configuration of the Avaya TAPI Driver on one client PC. Repeat Steps 1-8 for the remaining Visual Rapport clients listed in Table 1.

#### 5.2. Configure Resource Software International Visual Rapport Client

The information provided in this section assumes that the Visual Rapport client has already been successfully installed and licensed on the PC.

- 1. From the Visual Rapport PC, navigate to Start → Programs → RSI → Visual Rapport for TAPI → Desktop Console.
- 2. Click through the initial screens that appear, responding to prompts as appropriate for the local configuration (not shown).
- 3. In the RSI Visual Rapport Client wizard window that is displayed, click Next >.



4. In the Messaging Configuration window that is displayed, set Visual Rapport Server Address to the IP address of the Visual Rapport server as listed in Figure 1, verify Service Port(s), and Client Port(s) match the settings made on the Visual Rapport server configuration in Section 4 Step 7. Click Test Insta-Message Configuration...

**Note:** By default, **LOCALHOST** is placed in the **Visual Rapport Server Address** field. In this case, **LOCALHOST** has an IP address of 192.45.210.24 and does not need to be changed since server and client are running on the same PC. Change as appropriate.

🗃 RSI Visual Rapport Client		
Messaging Configuration		
5		
Visual Rapport Server Address: LOCALHOST		
Unicast Communications	Multicast Group Address:	
Server Port(s): 9030	255 . 255 . 255 . 255	
Client Port(s): 9031	✓ Use Broadcast Communications	
<u>Iest Insta-Message Configuration</u> <u>View Serv</u>	ver Properties	
	<pre>&lt; Back Next &gt; Car</pre>	ncel

5. If a popup window such as the one below is displayed, the connection between the Visual Rapport client and server is fine. Close the popup window.

S LOCALH	OST: 9030 Prope	rties			X
2 3 4	inistrative Contact	Server Identifi Name: Description: Network: Multicast Gro	cation REBEL RSI Visual F NODE-001 oup Address:	Papport Server	
Name: Location: Email:	Technical Support				

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- 6. In the Messaging Configuration window (Step 4), click Next >.
- 7. In the **TAPI Configuration** window that is displayed, select **Avaya IP Office TAPI2 Service Provider** from the pull-down menu for **Telephony Service Provider (TSP)**, make sure that **Callable** and **Owner** are checked and click **Next** >.

ğ	RSI Vis	ual Rappor	rt Client			X
T,	API Co	onfigura	tion			
-						
Т	elephony S	Service Provid	der (TSP):	Avaya IP O	ffice TAPI2 Service Provider	~
	Hide	Callable	Internal	Owner	Appearance Name	
		X		X	IP Office Phone: 55262 - 55262	
						_
					< <u>B</u> ack <u>N</u> ext> Ca	ancel

8. On the **Sign In** window that is displayed, select the first Visual Rapport client extension number listed in **Table 1** and enter the password defined for the Visual Rapport client in **Section 4 Step 4**. Click **Finish**.

🗃 RSI Visua	l Rapport	Client	×
Sign In			
l	User Id: Password:	JohnSmith	
		< <u>B</u> ack <u>Finish</u> Cancel	

9. In the **RSI Visual Rapport Client** window that is displayed, confirm the bottom right corner shows the logged-in extension with a green background.

										_
🗃 RSI Visual Ra	pport Client									
File Tools Help										
Extensions Telepl	none Call History	Personal								
Enterprise		Status	[	Ext	Family Name	Given Name	Remote Number	Remote Name	Call Directio	n Cal
- Tools		-	Offline	44320	Adams	John				
		-	Offline	55263	Smith	Tim		+		
	4									
										2
Call Display										
Appearance	Remote Number	F	Remote Name		Call Direction	Trunk	Call State			
<u> </u>		<u> </u>								
										- 0
SMITH, John									55262	2 (

10. Repeat **Steps 1 – 9** for the remaining clients listed in **Table 1**. This completes initial configuration of the Visual Rapport client.

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#### 5.2.1. Configure Visual Rapport Client for Generic Screen Pop

- 1. Go to Start  $\rightarrow$  Programs  $\rightarrow$  RSI  $\rightarrow$  Visual Rapport for TAPI  $\rightarrow$  Desktop Console to launch the Visual Rapport client.
- 2. On the **RSI Visual Rapport Client** window that is displayed, select **Tools** → **Call-Pop Script Editor...**

ğ.	RST V	isual Rapport Client									
File	Tool	s Help									
Exte	ß	Call Event Script Editor	Personal	1							
8	C <sup>S</sup>	Call-Pop Script Editor	Status		Ext.	Family Name	Given Name	Remote Number	Remote Name	Call Direc	ction Cal
		String Translations		Offline	44320	Adams	John				
		Customize		Offline	55263	Smith	Tim		l	l	
		Options	1								
		•									
		•									
			(1) STR. ( (77770))								
	_										2
Cal	l Dis	play Develo Newbor	, in the second s	Demoks Marris	-	Call Disasting	Tamb	Call Chairs			
	ppear	ance Hemote Number	1	remote Name		Call Direction	Hunk	Lail State			
							······				
-		12								1 Statistics	- 0

3. On the Call-Pop Script Editor window that is displayed, for Inbound 1 under Menu Caption, check Enabled and Auto and click Edit Script...

19	C	ill-Pop S	cript	Editor			
ſ	Inbo	und Call H	andling	Script Outbou	ind Call Handling S	cript	
		Enabled	Auto	Menu Caption	Hotkey	Version	Description
	•	X	X	Inbound 1	SHIFT+ALT+1		
				Inbound 2	SHIFT+ALT+2		
				Inbound 3	SHIFT+ALT+3		
				Inbound 4	SHIFT+ALT+4		
				Inbound 5	SHIFT+ALT+5		
Ŀ							Edit Script Close

4. On the Microsoft® Visual Basic® Scripting Edition – Editor window that is displayed, select File → Import Script.

Microsoft® Visua	Basic® Scripting	Edition - Editor		
Edit View Help				
Save Ctrl+S				
Export Script	1			
🗎 Import Script				
🗋 Page Setup				
Print Preview				
Print Ctrl+P				
Exit Alt+F4				
<			 	
1; 1	Insert			

5. On the **Open** window that is displayed, select **NotepadDump.vbs** and click **Open**.

Open		? 🗙
Look jn:	🗁 VBScripts 🕑 😗 📂 🖽 •	
My Recent Documents Desktop My Documents	Actl.vbs         CallNotification.vbs         GenWebBrowserEx.vbs         Goldmine.vbs         Maximizer.vbs         MsAccess.vbs         MsOutlookEx.vbs         MsWebBrowserEx.vbs         MsWebBrowserEx.vbs         NotepadDump.vbs         NotepadEx.vbs	
My Computer REBEL		
	File name:	<u>D</u> pen
My Network	Files of type:         VBScript Files (*.vbs)         C	Cancel

6. On the Microsoft® Visual Basic® Scripting Edition – Editor window, select File  $\rightarrow$  Save.

đ	Microsoft	t® Visual I	Basic® Scriptin	ıg Edition - Editor	
File	Edit Vie	w Help			
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- 7. On the Microsoft<sup>®</sup> Visual Basic Scripting Edition Editor window (Step 6), select File → Exit.
- 8. On the Call-Pop Script Editor window (Step 3), click Close.
- 9. On the **RSI Visual Rapport Client** window, select **Tools**  $\rightarrow$  **Customize...**

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Solution & Interoperability Test Lab Application Notes ©2008 Avaya Inc. All Rights Reserved. 10. On the **Customize** window that is displayed, check **Auto-pop inbound calls**, select **After a delay of 2 seconds** and click **OK**. This completes configuration of Visual Rapport client to generate screen pop for inbound calls.

🗃 Customize	X						
Hotkey Assignments Dialing Rules							
Call Information Screen-Pop							
<ul> <li>Auto-pop inbound calls:</li> <li>After call answered</li> <li>After a delay of 2 seconds</li> <li>Immediately</li> </ul>							
Auto-pop outbound calls dialled by Visual Rapport							
OK Cano	cel						

11. Repeat Steps 1 – 10 for the remaining clients listed in Table 1.

## 6. Interoperability Compliance Testing

Interoperability compliance testing evaluated the ability of Visual Rapport to successfully generate screen pops for inbound calls. Answer, Hang Up, Hold, Transfer, and Park of inbound, outbound and internal calls were verified successfully using the Visual Rapport clients.

## 6.1. General Test Approach

The general test approach was to verify:

- The telephone status capabilities of the Visual Rapport application.
- The telephone feature capabilities of the Visual Rapport application including Answer, Hang Up, Hold, Transfer, and Park of inbound, outbound and internal calls.
- The capability of Visual Rapport to dial Avaya IP Office shortcodes (for example, \*17, \*07\*55262#). For more information on shortcodes, see Reference [1].
- The screen pop capabilities of the Visual Rapport application when the client extension detects an incoming call.
- The serviceability of Visual Rapport.

## 6.2. Test Results

Visual Rapport successfully passed all test cases. As a result of the testing, the following observations were noted:

- Avaya IP Office does not provide Caller ID Name via TAPI for incoming PRI trunk calls.
- Avaya IP Office is does not send the correct Call Display Trunk information to the Visual Rapport client for both incoming and outgoing trunk calls.
- The Visual Rapport client requires a restart if the client's associated extension is involved in a conference call. Visual Rapport does not support Conference; however, the associated extension's involvement in a conference is not affected by the reset.
- The Visual Rapport client does not support Message Waiting Indication (MWI).
- The Visual Rapport client does not support Do Not Disturb, Call Forwarding, or Voicemail; however, this should not prevent the ability to dial the Do Not Disturb, Call Forwarding, or Voicemail shortcodes from the client (or any programmed shortcode).

# 7. Verification Steps

The following steps may be used to verify the configuration:

- Verify each Visual Rapport client PC successfully pings each Avaya IP Office as well as the Visual Rapport server in the test network.
- Place a call between two Visual Rapport client extensions and verify that each Visual Rapport client can be used to display, answer and hang up the call.
- Verify each Visual Rapport client can be used to initiate and/or drop an inbound or outbound call.
- Verify each Visual Rapport client can be used to Hold, Transfer, and Park inbound, outbound and internal calls.
- Verify incoming calls to extension 55263 activate screen pop of Microsoft NotePad after two seconds as described in **Section 5.2.1**, and the information is correct.
- Verify each Visual Rapport client can be removed and connected from the network without issues.

## 7.1. Visual Rapport Client

1. The Visual Rapport client is activated by clicking on the appearance button or by picking up the associated ringing telephone extension. The screen below displays an inbound call that has been answered at extension 55263. A right-click on the active appearance pops a call operation menu, where Visual Rapport call features are performed.



2. Click the **Telephone** tab from the above window. The **Number** pad was used to for Avaya IP Office shortcode dialing, and for any other dialing requirement.

💣 RSI Visual Rapp	ort Client						
File Tools Help Extensions Telephon	e Call History Person	a					
General Advanced							
Number: *35*55263*1234# 1 2 2 4 5 1 7 8 5 2 0 3	Dial     Dial     Unpark     Clear     Disconnect						
Call Display		<b>D</b>	0.00		0.00		
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SMITH, Tim						55263	20

3. Screen pop presentation was in the format presented below.

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Appearance	
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## 8. Support

Technical support for Visual Rapport can be obtained by contacting Resource Software International Systems, Ltd. at:

- Phone: 800.891.6014 / 905.576.4575
- E-mail: <u>support@telecost.com</u>
- Web: <u>http://www.telecost.com</u>

# 9. Conclusion

These Application Notes describe the steps for configuring the Resource Software International Visual Rapport clients to interoperate with Avaya IP Office systems. All test cases completed successfully.

# 10. References

The following Avaya product documentation can be found at <u>http://support.avaya.com</u>:

[1] Avaya IP Office 4.0 Installation Manual, Issue 15e (31<sup>st</sup> January 2007), 15-601042.

The following Resource Software International product documentation is installed during the Visual Rapport installation process:

[2] Visual Rapport Startup Guide

[3] Visual Rapport User Guide

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