

Avaya Solution & Interoperability Test Lab

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

### Abstract

These Application Notes describe the configuration steps required for Resource Software International (RSI) Visual Rapport to work with Avaya IP Office and generate screen pops for inbound calls. Visual Rapport is a visual communication console that provides employee telephone status, instant messaging, and screen pop at the client computer. Information in these Application Notes was obtained through compliance testing and additional technical discussions. Testing was conducted via the Developer*Connection* 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. RSI Visual Rapport is an intuitive integrated visual communication console that provides real-time employee telephone status, instant messaging, email, screen pop, call logging, and file transfer in the same product.

Business calls are usually linked with information that exists in database software or contact management applications, such as Access, Outlook, Act!, Maximizer, Goldmine or even a unique in-house 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 their database.

Visual Rapport simplifies call handling. Perform time-consuming telephony functions (including Answer, Hold, Park, and Transfer) with a few mouse-clicks. When an incoming call arrives, Visual Rapport can unobtrusively notify the user with the incoming Caller ID number information and enables the user to decide what to do with the call.

Visual Rapport consists of a server and client module. Each Visual Rapport client interfaces with the Avaya IP Office via TAPI 1<sup>st</sup> party (single-party) call control. The Avaya IP Office TAPI driver must be installed on the Visual Rapport client PC to establish the connection to the 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. Each Visual Rapport client reports its status to the Visual Rapport server thereby providing the Visual Rapport server with the ability to propagate Busy Lamp Field (BLF) and other status information of all registered and logged-in Visual Rapport clients. Communication between the Visual Rapport clients and server is via multicasting or broadcasting (user configurable) using a proprietary protocol. For the purposes of these Application Notes, the Visual Rapport clients and server were configured with multicasting (default).

**NOTE**: The Visual Rapport server does not support TAPI 3<sup>rd</sup> party control. Thus, the Visual Rapport server does not have the ability to report on the BLF or other status information of extensions and/or lines on the Avaya IP Office that do not have a TAPI 1<sup>st</sup> party call control link to a Visual Rapport client.

The configuration in **Figure 1** shows a network consisting of an Avaya IP412 Office, Avaya IP Office Manager PC, RSI Visual Rapport server and clients and an Avaya 4600 Series IP Telephone connected to the same network.

The Avaya IP412 Office has PRI and analog trunks to the PSTN. Analog telephones and Avaya 6400 Series Digital Telephones are connected to Avaya IP400 Expansion modules, which connect to the Avaya IP412 Office.

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Each of the RSI Visual Rapport clients in **Figure 1** have been configured with TAPI 1<sup>st</sup> party call control connectivity to the Avaya IP Office and is registered to a distinct extension. Please refer to **Table 1** for the mapping of extension to Visual Rapport client to Visual Rapport login User Id.

Client	Avaya IP Office extension	Visual Rapport client User Id
Visual Rapport client 1	x6501	6501
Visual Rapport client 2	x6504	6504
Visual Rapport client 3	x6517	6517

#### Table 1 – RSI Client To Avaya IP Office Extension To Visual Rapport Client User Id Mapping

The tested configuration is shown in Figure 1.

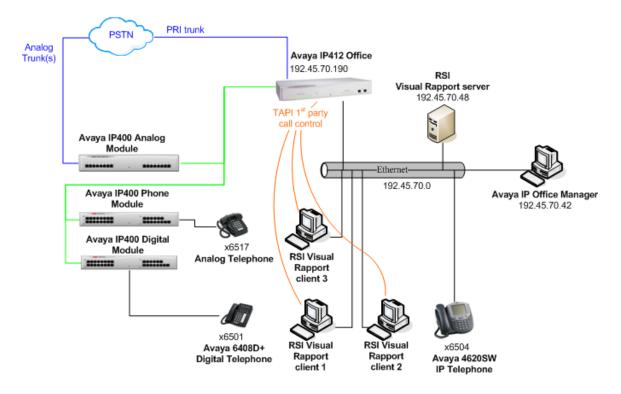


Figure 1 – Network Configuration Diagram

The Avaya IP Office was configured to route incoming calls to a hunt group or specific extensions, based on the test case being executed. During an incoming trunk call, the Avaya IP Office rang the destination extension. While this event occurred, the 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

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client could be configured to take different actions during an incoming call. For the purposes of compliance testing and these Application Notes, the Visual Rapport clients were configured to generate a screen pop when an incoming call was answered at the extension. Screen pop was in the form of Visual Rapport launching Notepad and the incoming call information was written to Notepad's buffer.

## 2. Equipment and Software Validated

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

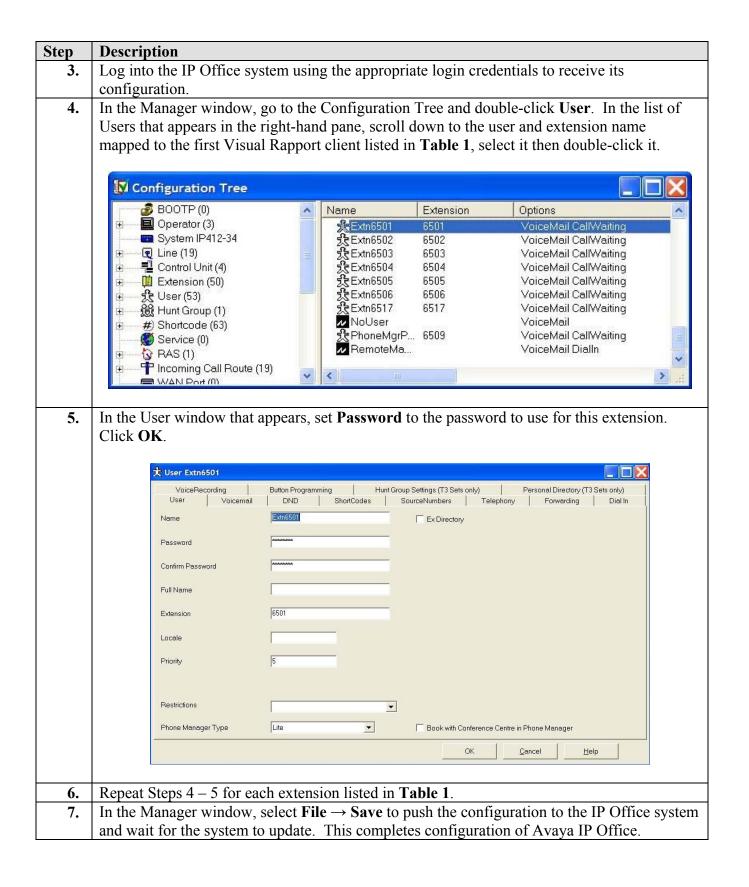
Product	Software/Version
Avaya IP412 Office	3.1(48)
Avaya IP400 Office Analog Module	5.1(48)
Avaya IP400 Office Digital Module	5.1(48)
Avaya IP400 Office Phone Module	5.1(48)
Avaya IP Office Manager	5.1(48)
Avaya 4620SW IP Telephone	2.3
Avaya 6408D+ Digital Telephone	-
RSI Visual Rapport server	1.08
RSI Visual Rapport client	1.08
PCs for Avaya IP Office Manager and RSI Visual	Windows 2000 Professional
Rapport server and clients	Service Pack 4
Analog Telephone	_

## 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 all other provisioning information, such as Avaya IP Office installation and configuration, etc., please refer to the Avaya IP Office product documentation in reference [1].

Step	Description
1.	Log into the IP Office Manager PC and go to Start $\rightarrow$ Programs $\rightarrow$ IP Office $\rightarrow$ Manager
	to launch the Manager application. Log into the Manager application using the appropriate
	credentials.
2.	In the Manager window that appears, select <b>File</b> $\rightarrow$ <b>Open</b> to search for the IP Office system
	in the network.



## 4. Configure RSI Visual Rapport server

The configuration information provided in this section describes the steps required to configure user accounts in RSI Visual Rapport server. This information is provided for completeness since 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 RSI 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.

Step	Description
1.	Log into the Visual Rapport server PC with the appropriate administrative credentials.
2.	Select the RSI Visual Rapport Server application running on the desktop and click the switch icon to turn the Communication Services off.
	File Tools Help         Communication Services are currently:         OFF
3.	In the RSI Visual Rapport Server window, select <b>Tools</b> $\rightarrow$ <b>Directory Services</b>
	Directory Services
	Network Mapping         intly:           Compact and Repair Database
	Options

Step	Description
4.	In the RSI Visual Rapport Server – Directory Services window that appears, click the \star in
	the left-hand pane, enter a Group Name, and then click v to save the information.
	📓 RSI Visual Rapport Server - Directory Services
	Group Name I Extension User Id Family Name Given Name IM Privacy Email
	+ - V X C + - V X C
	Extension: User Id: Password: Confirm:
	Administrative Group:
	Given Name: Family Name:
	Email
	Comment
	🔽 Insta-Messaging Enabled 📈 Allow Privacy
5.	In the RSI Visual Rapport Server – Directory Services window, click the • in the right-hand
5.	pane, set Extension to 6501, User Id to 6501, Password to the desired password,
	Administrative Group to the group name defined in Step 4, Display Name to <i>Ext6501</i> and
	click $\checkmark$ to save the information.
	ener v to save the information.
	😹 RSI Visual Rapport Server - Directory Services
	Group Name Extension User Id Family Name Given Name IM Privacy Email
	1 MyGroup + 6501 6501
	1
	+
	Extension: 6501 User Id: 6501 Password: **** Confirm: ****
	Given Name: Family Name:
	Email:
	Comment:
1	
	I Insta-Messaging Enabled ☐ Allow Privacy

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Step	Description
6.	Repeat Step 5 for each extension listed in Table 1. When done, close the window.
	Group Name Extension User Id Family Name Given Name IM Privacy Email
	I MyGroup         6501         IM         IM
	★         6517         ×         ■           6504         6504         I         I         I
	+ × × · · + - · × · · ·
	Extension: 6517 User Id: 6517 Password: www. Confirm: www.
	Administrative Group Display Name: KM6517
	Given Name: Family Name:
	Comment:
	Insta-Messaging Enabled ☐ Allow Privacy
7.	In the RSI Visual Rapport Server window, select <b>Tools</b> $\rightarrow$ <b>Options</b>
8.	In the Options window that appears, make a note of the Server Ports, Client Ports and
	Multicast Group Address settings in the Communication tab, as it will be referenced in
	Section 5.2 Step 4. Select the Server Identification tab. This example shows the default
	values.
	Options Communications Server Identification Administrative Contact Security Telnet CDR
	Server Ports: 9030 🚔 Multicast Group Address: 224 . 0 . 39 . 255
	Client Ports: 9031 🚖 🗖 Broadcast (no support for IP Multicasting)
	Thermet Protocol Status
9.	In the Server Identification information that appears, make a note of the Name, Description
	and Network information entered, as it will be referenced in Section 5.2 Step 5. This
	example shows values entered during installation. If the information does not appear, refer
	to documentation in [2] and [3]. Click <b>OK</b> .
	Options
	Communications Server Identification Administrative Contact Security Telnet CDR
	Name: HARLEY Description: RSI Visual Rapport Server
	Network: NODE-001
	Theref Protocol Status
10.	This completes configuration of the Visual Rapport server.

# 5. Configure RSI 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 Visual Rapport client software to integrate with other 3<sup>rd</sup> party products, etc., please refer to the RSI Visual Rapport product documentation in references [2] and [3].

### 5.1. Install and Configure Avaya TAPI Driver

Step	Description
1.	Log into the Visual Rapport client PC with administrative privileges and launch the Avaya IP
	Office User Suite setup.exe on the CDROM drive.
2.	Click Next in the InstallShield wizard until the Select Components window appears. Check
	<b>TAPI</b> to install the IP Office TAPI driver on the PC.
	InstallShield Wizard
	Select Components Choose the components Setup will install.
	Select the components you want to install, and clear the components you do not want to
	install.
	TAPI TAPI
	DEV Link
	CRM Client Integration
	Space Required on C: 3564 K
	Space Available on C: 13187792 K
	< Back Next > Cancel
3.	Click Next to complete the installation of the Avaya IP Office User Suite. At the
	InstallShield Wizard Complete window, click Finish.
4.	Go to Start $\rightarrow$ Control Panel and double-click the Phone and Modem Options icon in the
	Control Panel window that appears.

Step	Description
5.	In the Phone and Modem Options window that appears, select the Advanced tab.
	Phone and Modern Options       Image: The list below displays the locations you have specified. Select the location is which you are dialing.         Location:       Location         Modern:       Other Code         Interview Location       732         New       Edit         Delete       Other
6.	In the Advanced tab window that appears, highlight Avaya IP Office TAPI2 Service Provider and click Configure
	Phone and Modem Options
	Dialing Rules Modems Advanced
	The following telephony providers are installed on this computer:
	Providers: Avaya IP Office TAPI2 Service Provider Avaya IP Service Provider Microsoft Mi23 Telephony Service Provider Microsoft Multicast Conference TAPI Service Provider NDIS Proxy TAPI Service Provider TAPI Kernel-Mode Service Provider Unimodem 5 Service Provider
	Add <u>B</u> ernove <u>C</u> onfigure
	OK Cancel Apply

Step	Description
Step 7.	Description In the Avaya TAPI2 configuration window that appears, set Switch IP Address to the IP Address of the 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., <i>Extn6501</i> and set User Password to the password set for the User in Section 3 Step 5. Click OK.
8.	In the Phone and Modem Options window, click <b>OK</b> .
9.	Reboot the client PC for the new changes to take effect. This completes configuration of the Avaya TAPI Driver on the client PC.
10.	Repeat Steps 1 – 9 for each Visual Rapport client listed in Table 1.

### 5.2. Configure RSI Visual Rapport Client

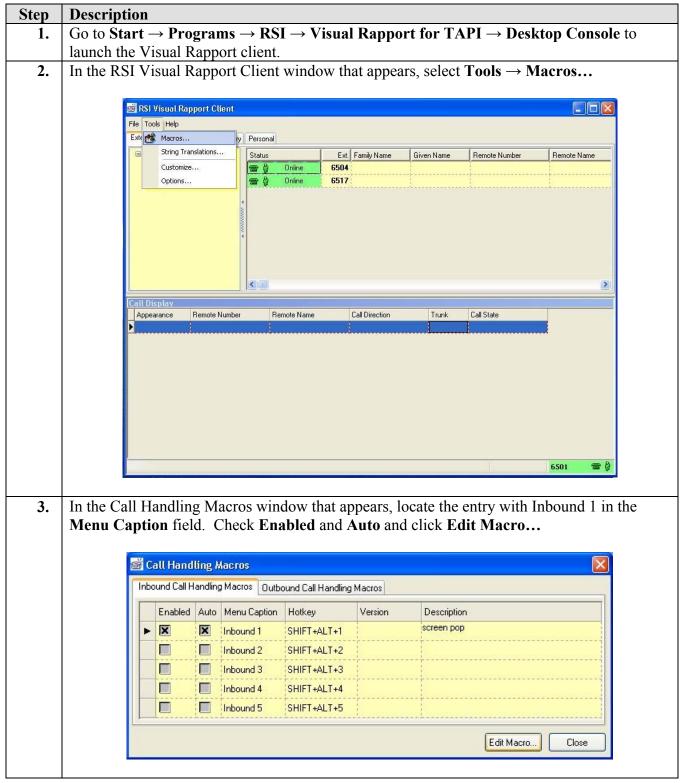
The information provided in this section assumes Visual Rapport client has already been successfully installed and licensed on the PC.

Step	Description
1.	Log into the Visual Rapport PC with the appropriate administrative credentials and navigate
	to Start $\rightarrow$ Programs $\rightarrow$ RSI $\rightarrow$ Visual Rapport for TAPI $\rightarrow$ Desktop Console.
2.	Click through the initial screens that appear, responding to prompts as appropriate for the
	local configuration.

Step	Description		
3.	In the RSI Visual Rapport Client wizard window that next appears, click Next.		
	RSI Visual Rapport Client     Welcome Visual Rapport		
	Visual Strike Visual Rapport Client for use.		
	Rapport communication at your fingertips Visual Rapport DESKTOP CONSOLE		
	by Resource Software International Ltd. 40 King Street West, Suite 300 Oshawa, Ontario, Canada L1H 1A4 Phone: +1 (905) 576-4575 www.telecost.com		
	Import A Client Configuration		
	< <u>Back</u> Next > Cancel		
4.	In the Messaging Configuration window that appears, set Visual Rapport Server Address to the IP Address of the Visual Rapport server as listed in Figure 1, verify Multicast Group Address, Service TCP & UDP Ports, and Client TCP & UDP Ports match the settings made on the Visual Rapport server configuration in Section 4 Step 8. Click Test Insta- Message Configuration		
	📓 RSI Visual Rapport Client 🛛 🔀		
	Messaging Configuration		
	Visual Rapport Server Address: 192.45.70.48		
	Multicast Group Address: 224 . 0 . 39 . 255		
	Broadcast (no support for IP Multicasting)		
	Server TCP & UDP Ports: 9030 CIest Insta-Message Configuration		
	Client TCP & UDP Ports: 9031 Siew Server Properties		
	Thternet Protocol Status		
	< <u>Back</u> <u>Next</u> Cancel		

Step	Description		
5.	f a popup such as the one listed below appears, the connection between the Visual Rapport lient and server is operational. Close the popup. If the popup does not appear, refer to [2] and [3] for troubleshooting information.		
	192.45.70.48:9030 Properties   Server Identification   Name:   HARLEY   Description:   RSI Visual Rapport Server   Network:   NODE-001   Multicast Group Address:   224.0.39.255		
6.	In the Messaging Configuration window, click Next.		
7.	In the TAPI Configuration window, ener read. In the TAPI Configuration window that appears, select <b>Avaya IP Office TAPI2 Service</b> <b>Provider</b> from the pull-down menu for Telephony Service Provider (TSP). Verify that <b>Callable, Internal</b> and <b>Owner</b> are checked and click <b>Next</b> .		
	SI Visual Rapport Client		
	TAPI Configuration		
	Telephony Service Provider (TSP):       Avaya IP Office TAPI2 Service Provider         Hide       Callable       Internal       Owner       Appearance Name         I       I       I       IP Office Phone: 6501 - 6501		
	< <u>Back</u> <u>Next</u> Cancel		

Step	Description		
8.	In the Sign In window that appears, select the first Visual Rapport client extension number		
	listed in <b>Table 1</b> and enter the password defined for the Visual Rapport client in Section 4		
	Step 5. Click Finish.		
	1		
	📓 RSI Visual Rapport Client		
	Sign In		
	User Id: 6501		
	Password: ****		
	< <u>Back</u> <u>Finish</u> Cancel		
9.	In the RSI Visual Rapport client window that appears, confirm the bottom right corner shows		
	the logged-in extension with a green background.		
	🗃 RSI Visual Rapport Client		
	File Tools Help		
	Extensions Telephone Call History Personal		
	Enterprise Status Ext. Family Name Given Name Remote Numl		
	🕿 🍦 Offline 6517		
	Call Display		
	Appearance Remote Number Remote Name Call Direction Trunk Call State		
	6501 🖀 🖗		
10.	Repeat Steps $1 - 9$ for each extension defined in <b>Table 1</b> . This completes initial		
	configuration of the Visual Rapport client.		



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

Step	Description
4.	In the Microsoft Visual Basic Scripting Edition – Editor window that appears, select File $\rightarrow$
	Import Macro.
	📓 Microsoft® Visual Basic® Scripting Edition - Editor
	File         Edit         View         Help           Save         Ctrl+S         Image: Ctr
	Barro Carro
	a Import Macro
	Page Setup  Review
	Print Ctrl+P
	Exit Alt+F4
	()
	1: 1 Insert
5.	In the Open popup that appears, select NotepadDump.vbs and click Open.
	Open 😨 🔀
	Look in: 🔁 VBScripts 💽 🕜 🧊 🛤 -
	Act!.vbs
	My Recent Goldmine.vbs
	MSOutlookEx.vbs
	Image: MaxwebBrowserEx.vbs       Desktop       Image: MatepadDump.vbs
	NotepadEx.vbs
	Type: VBScript Script File Date Modified: 3/10/2005 10:50 PM
	My Documents Size: 3,69 KB
	My Computer
	File game: NotepadDump.vbs 🗸 Dpen
	My Network Files of type: VBScript Files (*.vbs) Cancel

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Step	Description		
6.	In the Microsoft Visual Basic Scripting Edition – Editor window, select File $\rightarrow$ Save.		
	📓 Microsoft® Visual Basic® Scripting Edition - Editor		
	File Edit View Help		
	Export Macro		
	Import Macro ft VBScript for: Microsoft's "Notepad" by: Resource Software International Ltd. (RSI)		
	□ Page Setup 2005 Q. Print Preview //////////////////////////////////		
	Print Ctrl+P ume next		
	Exit Ak+F4 set WShShell = CreateObject("WScript.Shell")		
	const KEY_BACKSPACE = "(BACKSPACE)"		
	<pre>const KEY_BREAK = "(BREAK)" const KEY_CAPS_LOCK = "(CAPSLOCK)"</pre>		
	const KEY_DELETE     = "(DELETE)"       const KEY_DOWN_ARROW     = "(DOWN)"		
	<pre>const KEY_END = "(END)" const KEY_ENTER = "(ENTER)" const KEY_ENTER = "(ENTER)"</pre>		
	<pre>const KEY_ESC = "(ESC)" const KEY_HELP = "(HELP)" const KEY_HOME = "(HOME)"</pre>		
	<pre>const KEY_ESC = "(ESC)" const KEY_HELP = "(HELP)" const KEY_HOME = "(HOME)" const KEY_INSERT = "(INSERT)" const KEY_LINSERT = "(LEFT)" const KEY_LEFT_ARROW = "(LEFT)"</pre>		
	const KEY_NUM_LOCK = "(NUMLOCK)" const KEY_PAGE DOWN = "(FGDN)"		
	const KEY_PAGE_UP = "(POUP)"		
	1:1 Insert		
7.	In the Microsoft Visual Basic Scripting Edition – Editor window, select File $\rightarrow$ Exit.		
8.	Return to the Call Handling Macros window and click Close.		
9.	In the RSI Visual Rapport Client, select <b>Tools</b> $\rightarrow$ <b>Customize</b>		
	SI Visual Rapport Client		
	Ext 🥵 Macros y Personal		
	String Translations     Status     Ext. Family Name     Given Name     Remote Number     Remote Name       Customize     Ext. Family Name     6504     Ext. Family Name     Ext. Fam		
	Options 65517		
	4		
	*		
	Call Display           Appearance         Remote Number         Remote Name         Call Direction         Trunk         Call State		
	<b>6501 雪</b> 發		

Step	Description
10.	In the Customize window that appears, check <b>Auto-pop inbound calls</b> , select <b>Immediately</b> and click <b>OK</b> . This completes configuration of Visual Rapport client to generate screen pop for inbound calls.
	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 9 \$ seconds</li> <li>Immediately</li> </ul>
	Auto-pop outbound calls dialled by Visual Rapport
	OK Cancel
11.	Repeat Steps 1 – 10 for each Visual Rapport client in <b>Table 1</b> .

## 6. Interoperability Compliance Testing

Interoperability compliance testing evaluated the ability of Visual Rapport to successfully generate screen pops for inbound calls. Answer, Hang Up, Call Hold, Call Transfer, and Call Park of inbound, outbound and internal calls were verified successfully using the Visual Rapport clients. A load test was executed involving the use of a call generator and an automated RapidFire test script written to drive the Visual Rapport client to answer and hang-up incoming calls.

### 6.1. General Test Approach

The general test approach was to verify that manually placed intra-switch calls, inbound trunk and outbound trunk calls could be placed to and from Visual Rapport clients as well as telephones attached to the Avaya IP Office. Features including Call Hold, Transfer, and Call Park were also verified.

For the load test, a call generator was used to place calls over eight PRI trunk channels to the Avaya IP Office. The Avaya IP Office routed the calls to a hunt group containing the extensions of all eight of the Visual Rapport clients setup for the load test. The hunt group was setup to ring in a circular pattern. As each incoming PRI call was routed to each Visual Rapport client extension, the RapidFire automated test tool drove the Visual Rapport client to answer the call

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then hang up after approximately 15 seconds. This behavior was repeated on all Visual Rapport clients for all incoming calls. The load test duration was set for two hours.

### 6.2. Test Results

Except for Issue 1 described below, all test cases completed successfully. The load test ran for two hours averaging 1680-1690 call attempts per hour. All Visual Rapport clients answered and hung up calls successfully. The total number of calls placed by the call generator was reported to be 3,428 and the total number of calls answered by the clients was 3,428. The call generator reported the average call length at ~14 seconds.

**Issue 1** – The Avaya IP Office TAPI did not provide 'Connected' message via TAPI for outbound T1 calls. This prevented the ability to use the Visual Rapport client to properly handle call control such as placing calls on hold, initiating call transfers, etc. for outbound T1 calls. **Status:** A trouble ticket (CQ# 23413) was submitted to the Avaya IP Office team regarding this issue.

The following observations, and/or issues not related to test cases, were noted during testing:

- The Avaya IP Office does not provide Caller ID Name via TAPI for incoming trunk calls. A request to provide this functionality in the future via TAPI will be placed with the Avaya IP Office team.
- 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 call should not adversely affect the client such that a restart of the client is required. RSI is investigating the issue.
- Visual Rapport client does not support Voicemail and Message Waiting Indication (MWI).
- Visual Rapport client does not support 'Do Not Disturb' and 'Call Forwarding'; however, this should not prevent the ability to dial the 'Do Not Disturb' and 'Call Forwarding' shortcodes from the client. RSI is investigating the cause of this issue.

## 7. Verification Steps

The following steps may be used to verify the configuration:

- Verify each Visual Rapport client PC can successfully ping the Avaya IP Office as well as the RSI Visual Rapport server.
- Place a call between two Visual Rapport client extensions and verify each Visual Rapport client can be used to answer and hang up the call.

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• Verify each Visual Rapport client can be used to initiate and drop an inbound or outbound call.

## 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: support@telecost.com
- Web: www.telecost.com

## 9. Conclusion

These Application Notes describe the steps for configuring the RSI Visual Rapport Clients to generate screen pops for inbound calls to their associated Avaya IP Office extension. Except for Issue 1 described in Section 6.2, 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 3.1 Installation Manual, Issue 131 (23<sup>rd</sup> January 2006).

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

[2] Visual Rapport Startup Guide [3] Visual Rapport User Guide

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