**iteloffice**
computer telephony software

# Cuba for BMC Service Desk Express - Avaya TSAPI

# Quick Start Guide

# Cuba Version 1.3

**Document Number:**    0403-00287

**Revision:**    A

**Date:**    19<sup>th</sup> Dec 2009

# 0. PRELIMINARIES

## Published by

Itel Office Software Limited, 5 Enmore Gardens, London, SW14 8RF  Tel: +44(0)20 8878 7367, Fax: +44(0)20 8876 7257

## CopyRight

© Itel Office Software Ltd 2002 - 2009

This document is the copyright of Itel Office Software Limited and the information therein may be the subject of a pending or granted patent. It may not be reproduced or used for any other purpose than that for which it is supplied without the written permission of Itel Office Software Limited.

## Document History

First issued @ revision A, on 2009-12-19, by A. Comber


## BIBLIOGRAPHY

### 0.1.1  REFERENCED DOCUMENTS

[1]      TSAPI, http://support.avaya.com/elmodocs2/AES/4.2/02-300544_i4.pdf

# TABLE OF CONTENTS

# 1. INTRODUCTION

This Quick Start Guide is designed to help you get up and running with Cuba for BMC Service Desk Express (SDE). It gives you an overview of how Cuba works and fits into your network. Then it focuses on downloading your software and setting up basic inbound call handling via the Cuba Web Administrator.

Once you're connected we recommend you take a look at our Installation Guide which takes a more in depth look at configuring your settings.

# 2. OVERVIEW

Cuba for SDE comprises of two separate components. The Cuba Client connects to your Service Desk Express database and is used by agents to select their extension and their SDE username. The Cuba Server connects to your telephone system.

The Cuba Server communicates with your phone system via the TSAPI interface which is provided by Avaya.  The Avaya TSAPI Server provides a TSAPI interface for Cuba and also communicates with your Avaya telephony hardware.

The diagram below illustrates a typical installation.

SDE Server    User Workstation/Cuba Client         Cuba Server              TSAPI Server
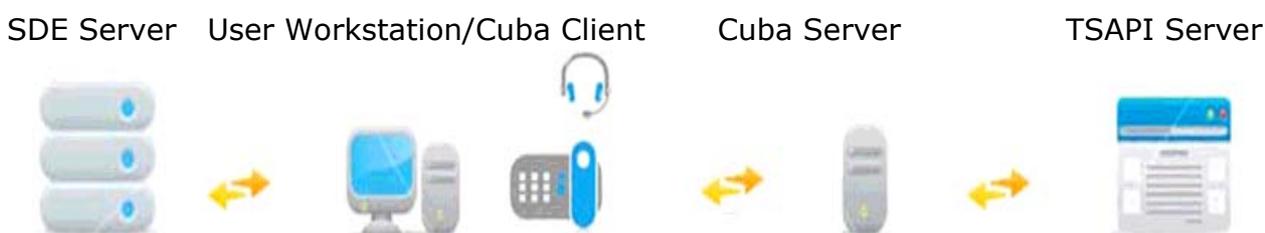


Your Cuba Server can sit on any PC on your local Network. During your trial period you will probably host it on the PC that you initially downloaded it to - however, once it's up and running you'll probably want to locate it on a separate 'always on' PC on your network.

To start your trial you must install both the Cuba Server and the Cuba Client - and you'll need to enter some simple information about your SDE software and the machine that it's hosted on. This information is entered centrally via the Cuba web administrator and is stored on the Cuba Server.

Install the Cuba Client on your SDE user workstations.  Note that the trial/evaluation installation means that the Cuba Server shuts down after three hours operation.  Restart the Cuba Server to resume operation.

# 3. PREPARATION

### 3.1  Configuring the Telephony Interface

The Cuba Server communicates with the Avaya telephone system via a TSAPI Server, which must be fully installed and configured.  However, this step can be deferred if you intend only to evaluate the Cuba functionality.  The Cuba Simulator can be used until your TSAPI Server is ready.

## 3.2  Preparing SDE for Screenpop

The current version of Cuba for SDE can screenpop Service Desk Express.  The SDE push service is used as the mechanism to deliver a screenpop to a specified logged in user.  The Cuba client sends a http request to the SDE server specifying the username, the telephony data to send and SDE specific information.  If the specified user is logged into SDE and a match is found in the field specified in the request, a form is screen popped.

Telephone systems provide caller information such as Caller ID as a string with no spaces or formatting characters.  The text in the specified field must exactly match the text provided by the telephone system.  If telephone numbers in the SDE database contain spaces or formatting characters then a match will not be successful.  This is a very important consideration and should not be overlooked.

### 3.2.1  CONFIGURE SDE PUSH SERVICE

Ensure that your version of SDE is at least version 9.8.  If 9.6, update to v9.8 for best results.

Launch SDE and log in as administrator.  Click on System Administration, Application Administration menu.  Click System tab.  Tick Enable Push Service checkbox and click on Configure Push button.  Click Create New Push Event button.

Enter these parameters:
Push Event ID = CUBAEVENT
Module = Incident
Form = <Use Group Default Form>
Form mode = Create a new record with preloaded data
Pre-populate = All fields from a linked module
Linked modules = Clients (Client ID)
Save this configuration.

### 3.2.2  CONFIGURE IIS

Launch Internet Information Manager (IIS).  On Windows 2003 Server this can be accessed via Start… App Programs… Administrative Tools… Internet Information Services (IIS) Manager.  Select Default Web Site branch and check if a pps virtual folder has been created.  If not create a virtual directory called pps with real path=C:\Program Files\BMC\Service Desk Express\PPS\PPSWEB if you installed SDE to the default location.  If not, adjust accordingly.  Close IIS Manager.

### 3.2.3  CONFIGURE SDE COMPONENT SERVICES

In Windows go into Component Services (Control Panel, Administrative Tools, Component Services.  Navigate to DCOM Config branch and select SDE Push Service - SDEPPS, right click Properties.  Click Security tab.

In Launch and Activation Permissions section select Customise and click Edit button.  Select Internet guess account (IUSR_<computername>) and allow everything.  Do same for IWAM_<computername> account.  Do the same for Access Permissions and Configuration Permissions.  Click OK.

Go into Windows Services and configure Push SDE Push Service - SDEPPS to start automatically at computer startup.

Restart computer.


# 4. DOWNLOADING YOUR CUBA SOFTWARE

Download your Cuba Software at: **www.iteloffice.com**

To get going with Cuba you need to first download the software. The download operates intuitively and takes just a couple of minutes – but just for the record here's a simple visual overview – using Firefox as the web browser…


Log onto the designated Windows NT/2000/XP/Vista/2003 PC as an administrator.



click 'Save File ' >> double click on details >> click 'OK' >>


**INSTALLING CUBA SERVER**

Then the InstallShield Wizard will launch - this will first install the Cuba Server. In this section we will first install the Cuba Server then return to install the Cuba Client.



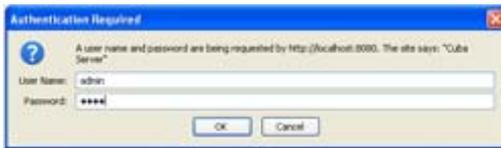Click Next >>        accept licence >>   enter name >>        click Next >>



Click Next >>              installs >>              click finish >>

A dialogue box will appear…



Enter:

**User Name: admin**
**Password: cuba**

Click 'OK' and the Cuba Web Administrator launches automatically on the 'Settings' page.

The Cuba Server installation copies a file, TSLIB.INI to the install folder.  The default install folder is **C:\Program Files\Ioffice\Cuba.**  Edit this file by entering the IP address of your TSAPI Server.  If Cuba server is installed on the same computer as the TSAPI server you can enter 127.0.0.1 as the IP address.

Example where IP address of TSAPI Server is 192.168.0.50:
[Telephony Servers]
192.168.0.50=450

After editing, copy this file to the computers Windows directory.  This is usually C:\Windows.  On some computers it may be C:\WINNT or a custom location.  If in doubt type echo %WINDIR% <ENTER> at a command prompt.

# 5. CONFIGURING CUBA BASIC SETTINGS

You are now ready to enter some basic settings in the Cuba web administrator.  Navigate to http://<CubaServerHostname>:8080 and login with the default username: admin, password: cuba.

This example enables Cuba to ScreenPop your selected SDE Form onto your screen as your contacts dial in. Cuba displays your Callers details in a SDE Form by matching the telephone no. of the incoming call - the Caller ID – to data within a telephone number field in a SDE Form.

These data fields are:

| | |
|---|---|
| **SDE Server Name** | Enter the IP address/hostname/domain name of your Service desk express application server. |
| **Push Service IIS Virtual Directory** | Cuba uses the default pps as described in the preceding section.  However, if a different IIS virtual folder has been configured, enter the name used here. |
| **ASP File** | Generally, ScreenPop.asp should be used.  But if a different asp file has been configured enter the filename here. |
| **Push event name** | If the procedure in the preceding section has been followed enter CUBAEVENT here.  If not, enter whatever event name has been configured. |

**Telephony data**              Select Caller ID to screenpop the callers number.
                                However, if preferred you can screenpop the dialed
                                number.

**Pop type**                    Select Alerting to screenpop as soon as the agents phone
                                starts ringing.  Select connected if you prefer the
                                screenpop to occur on answering the call.

**Screenpop internal**          Internal calls include calls transferred from agent to agent
**calls**                       so generally it is most appropriate to select this option.


Don't forget to click the Save button to save any configuration changes.

You can test your configuration by entering a test SDE username and test telephone number and clicking the Test Pop button.  Note that the user must be logged into SDE for this to work.  In addition, the telephone number in the SDE form must be formatted exactly the same as in the Test Caller/Called ID field.  The telephone system presents the caller or called ID as a string with no spaces or formatting.  So for numbers to match your database you may need to strip out spaces and formatting characters.

**Creating list of extensions**

In the Cuba Web Administrator click on the devices link on the left hand side and enter the telephone extensions that your SDE users have on their desks.


**Configuring TSAPI Server Logon**

In the Cuba Web Administrator click on the cti link hyperlink on the left hand side and enter the TSAPI Server name and an account login name and password.  Refer to the Cuba TSAPI Installation Guide for further details.


**INSTALLING THE CUBA CLIENT**

To install your Cuba Client,

**Click: 'Start' > 'All Programs' > 'Cuba' > 'Install Cuba Client' >**

As previously, the InstallShield Wizard will launch… again, work through the wizard until you reach 'Finish'.

Once you have completed the wizard you will notice that the Cuba Telephone Icon… appears in your System Tray.

Double Click on the Telephone Icon and a dialogue box with a drop down menu will appear - click on the down arrow to reveal a drop down box that displays your extensions.

Choose your extension and Click 'Select' and enter your SDE username in the Username field. You'll see that the Cuba Telephone Icon has turned green to indicate you have successfully connected Cuba to your telephone extension.

### INSTALLING CUBA CLIENT ON A TARGET WORKSTATION

You'll find the Cuba (Client) Installation Program in your Cuba Server installation folder - which by default is: **C:\Program Files\Ioffice\Cuba.**

The Cuba (Client) Installation file is: **cubasde_client_setup.exe.**

If you want to install the Cuba client on other workstations, copy the **cubasde_client_setup.exe** file to a shared network location - accessible from other workstations - then run the Setup Program on as many workstations as you require.

# 6. CAN I EVALUATE CUBA IF I DO NOT YET HAVE A TELEPHONY LINK?

You're nearly done.

Cuba communicates with your phone system via a TSAPI Server so you will need to install and configure this item. However, even without a TSAPI Server you can evaluate the product and even simulate calls via the simulator (Right click Cuba client icon in systemtray, select Open, click Settings button, click Simulate).

Your telephone system maintainer should be able to advise on supplying the TSAPI Server, pre-requisite hardware and software and configuring and installing.

Prospective customers usually download and install Cuba Server onto their office PC to evaluate. You can later re-install Cuba Server on either the TSAPI Server computer or a dedicated server computer.

### WHAT NEXT?

Using Cuba in evaluation mode will allow you to test the functionality and see if the product can work in your environment. The Cuba Server stops operation every three hours. This hindrance is removed by registering the Cuba Server. Feel free to install the Cuba client on as many workstations as are available. The Cuba for SDE licence places no restriction on number of users connecting to a single Cuba Server.