

# **Cuba for Remedy TAPI**

## **Quick Start Guide**

### **Cuba Version 1.3**

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## 0. PRELIMINARIES

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## BIBLIOGRAPHY

### 0.1.1 REFERENCED DOCUMENTS

- [1] TAPI, [http://msdn.microsoft.com/en-us/library/ms737218\(VS.85\).aspx](http://msdn.microsoft.com/en-us/library/ms737218(VS.85).aspx)

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## 1. INTRODUCTION

This Quick Start Guide is designed to help you get up and running with Cuba for Remedy. 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 Remedy comprises of two separate components. The Cuba Client connects to your Remedy Client and the Cuba Server connects to your telephone system.

The Cuba Server communicates with your phone system via the TAPI interface which is provided in the form of a TAPI driver by your telephone system manufacturer. Install the TAPI driver for your system on the same machine as you install the Cuba Server.

The diagram below illustrates a typical installation.



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 Remedy 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 Remedy 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

Configuring the telephony interface is very specific to the manufacturer of your telephone system. Essentially, you will require all the components necessary to install a third party TAPI driver for your equipment. On some systems, all that is required is installation of the TAPI driver software. On some systems extra hardware may be involved. The TAPI driver must be able to operate in third party mode. In other words, provide the capability to control multiple devices. First party

TAPI drivers, used to control a single telephone are not suitable. Some TAPI drivers work in both modes and it is necessary to select a 'third party mode'.

Contact your manufacturer or your supplier for further details. Alternatively, feel free to email us on [support@iteloffice.com](mailto:support@iteloffice.com) with any questions.

### 3.2 Preparing Remedy for Screenpop (Simple Scenario)

Select an existing Remedy form with a telephone number field. The telephone numbers in the telephone number field should be stored without spaces or formatting. If this is not the case, either strip out any formatting characters or use a mirror hidden field which contains the same data as the existing telephone number field but with formatting characters and spaces removed. Another option is simply to create a new test form purely for testing.

Whichever option is chosen, make a note of the Remedy servername, Remedy form name and telephone number field.

Item	Value
Remedy Server name	
Remedy form name	
Remedy telephone number field name	

Creating a Remedy softphone is covered in the Cuba Install Guide.

## 4. DOWNLOADING YOUR CUBA SOFTWARE

Download your Cuba Software at: [www.iteloffice.com](http://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.



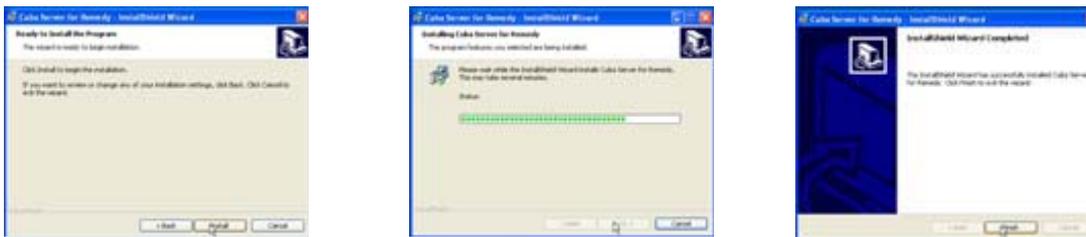
click 'Save File ' >> double click on details >> click 'OK' >>

## 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 >>

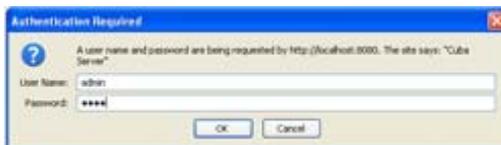


Click Next >>

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 'remedy settings' page.

## 5. CONFIGURING CUBA BASIC SETTINGS

You are now ready to enter some basic settings. This will enable Cuba to ScreenPop your selected Remedy Form onto your screen as your contacts dial in. Cuba displays your Callers details inside the Remedy Form by matching the telephone no. of the incoming call - the Caller ID – to data within the Caller ID Field in the Remedy Form.

These data fields are:

- |                           |   |
|---------------------------|---|
| <b>Remedy Form Name</b>   | this is the name of the Form in Remedy that you want to appear or 'pop' onto the screen with the incoming call. |
| <b>Remedy Server Name</b> | this is the Host Name - or IP address – of the computer that your Remedy Server is located on.                  |

<b>Caller ID</b>	this is the name of the Remedy Field attached to the phone number that you want Cuba to recognise. It may well be 'Caller ID' – but it could be tagged as 'phone no', 'home phone' - or anything else your Remedy Consultant has decided to call it!
<b>AutoSearch</b>	Checked
<b>Open Form Mode</b>	Search (ARQuery)
<b>Screenpop Internal Calls</b>	Checked
<b>Screenpop Rules</b>	Check Caller ID

Remember to click Save button to save your settings.

**NOTE:** Remember we're dealing with databases here! Any data you enter is case sensitive and spaces count too. If your field name is 'CallerID' - then 'callerid', 'callerID', 'Callerid', or even 'Caller ID', just won't work. If in doubt – copy and paste!

### 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 Remedy users have on their desks.

### Configuring CTI link section

The TAPI version of Cuba Server requires no CTI link configuration. These settings are entered into the TAPI driver configuration. So leave this section blank as it is not used.

## 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'. You'll see that the Cuba Telephone Icon has turned green... You are now connected to your Remedy Application.



## 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\office\Cuba**.

The Cuba Client Installation file is: **cubarem\_client\_setup.exe**.

If you want to install the Cuba client on other workstations, copy the **cubarem\_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.

**Note:** You can install the Cuba Clients on as many workstations as you like. Your licence will determine how many concurrent Cuba Clients can connect to a Cuba Server.

## 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 TAPI driver so you will need to install and configure this item. However, even without this in place 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 TAPI driver, 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 a dedicated server computer. The Cuba Server registration code is tied to the computer hardware it is installed on. So request a registration code from the computer which will ultimately become the Cuba server.

### 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 limitation is removed by registering the Cuba Server. Feel free to install the Cuba client on as many workstations as are available.