



Cisco Smart Business Portal

Installation & Configuration Guide

Mitchell 1 Business Adapter

Version 2.0.0.2 Rev A (June 8th, 2009)

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Overview

Welcome to the Cisco Smart Business Portal Business Adapter for Mitchell1. This adapter and installation guide has been made specifically for the Mitchell1 Manager application. The Cisco UC platform extends its reach by adding business value and integration with the Mitchell1 application. The Cisco UC System and Smart Business Portal empower business by aligning strategic goals with daily automotive shop activities. The portal reads the data already in your Mitchell1 application and presents the wealth of information to the user through a simple inbound call ID or manual search.

Additionally, you already gain all the benefits of having the Cisco UC 500 Series for Small Business that power your network and phones. This includes built-in Networking, Security, Wireless, VPN Remote access, video and much more!

You should already be familiar and comfortable with all capabilities of the Cisco Unified Communications System and related Cisco technologies required as a base platform. This guide will not take the place of the voice system expert, but will assist with the Smart Business Portal related installation and configuration tasks.

You'll want a minimum experience with the Microsoft Windows system that is in place. This document does not go into troubleshooting existing issues.

For additional Cisco UC 500 Series support, please visit www.cisco.com.

For additional Cisco Smart Business Portal support please visit:

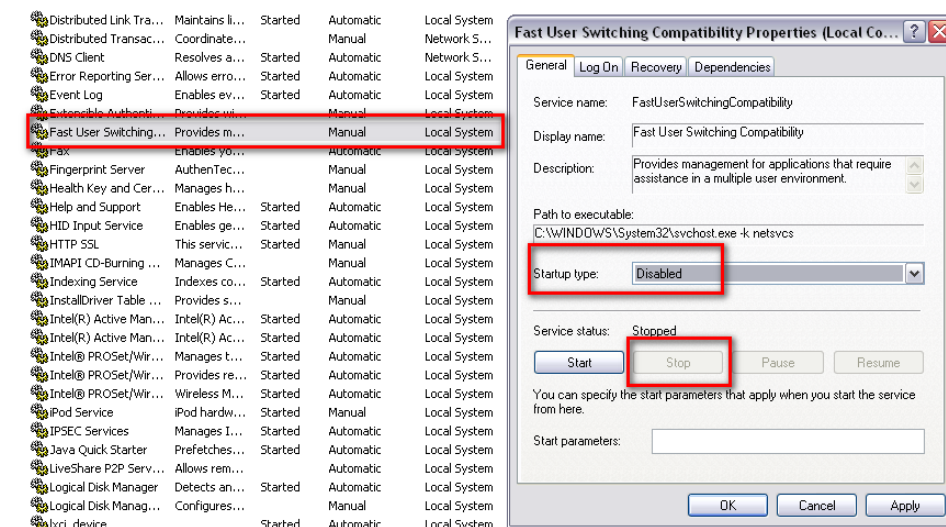
http://developer.cisco.com/web/sbp/forums/-/message_boards/category/1062714

For more information about this adapter, please send an email to Info@VocalMash.com

CSBP Prerequisites

Before installing the Cisco Smart Business Portal, several prerequisites are listed below. Prerequisites are classified as Systems Prerequisites, Previous Versions, Client Machine Requirements and Smart Business Portal Server Requirements.

- Environment
 - Active Directory - If using AD
 - All machines must be on the same domain
 - Running in Native Mode
 - Workgroup Environment – If using a workgroup
 - Every machine must be in the same workgroup
 - To check this right click on My Computer>Properties>Computer Name
 - To make changes click on My Computer>Properties>Computer Name>Change and select Workgroup. Rename the workgroup on each computer to the same name.
 - All users-names and passwords must be duplicated on the machine hosting CSBP.
 - To do this go to Start>Control Panel>User Accounts>User Accounts>Add to add user-names and passwords that matches those for each client machine that will connect to the CSBP.
 - If using Windows XP SP2 or higher, passwords must not be blank
 - Fast User Switching Compatibility must be turned off on the machine hosting CSBP web services if this machine is running Windows XP Professional.



- To disable Fast User Switching Compatibility go to Start>Run> enter in the run window “services.msc”.
- Scroll down through the name field until you find Fast User Switching Compatibility



- Make sure that Fast User Switching Compatibility is NOT started and set to disabled.
- To change these setting double click the Fast User Switching Compatibility setting
 - Select Disable in the Startup Type window
 - Select the Stop Button in the Service Status section
- SMTP - SMTP server/hosted service for management customer satisfaction Email Web Part
- Application - CSBP server also hosts Mitchell1 application
- Video - Linksys WVC210 camera is required for the Camera Web Part
- Versions
 - Mitchell Manager Plus – this Cisco business adapter has been fully tested with Mitchell Manager Plus. It should work correctly with Mitchell Manager (non plus) however with preliminary testing has shown to work with all configurations without problems. If you have issues running this business adapter with Mitchell Manager, please refer to the support links at the end of this document.
 - Previous Versions (CSBP) -delete all previous versions of the Cisco Smart Business Portal if they have already been installed. Also delete the configuration directory (c:\inetpub\configuration, by default).
- Client Machine Requirements
 - The Cisco TSP Client for Cisco Unified Communications Manager (CM) 6.x, 7.x or Cisco Unified Communications Manager Express (CME) 4.2, 7.1, ensures you utilize a compatible version for your particular CME or CM version.
 - Version 2.0 of the .NET Framework
 - Windows XP Pro on web services machine
 - This machine must be able to host IIS, .NET, ASP for web services to function
 - Windows XP or Home for client machines
 - Client machines must be able to access the web services hosted on the server machine
 - Client OS must be compatible with required Cisco TSP version
 - Internet access
 - Internet explorer 6.x, 7.x.
- Smart Business Portal Server Requirements
 - Windows 2003 32-bit Server with latest patches
 - Windows XP Pro in workgroup configuration as above
 - Version 2.0 of the .NET Framework (includes)
 - ASP.NET
 - ADO.NET
 - XML Web Services
 - Internet Information Server 6.0
 - Windows XP Pro installs this as a Windows Component (requires setup files CD)
 - Microsoft Data Access Component 2.8
 - Internet access and Internet Explorer 6.x, 7.x.



- The ReportViewer.exe installer must be run in order for the SQL Reporting services web part to function. (The web application will show an error if this isn't installed).
- SQL Express 2005 for personalization.
 - Install with options for Windows Integrated Authentication *and* user authentication. We use User Authentication for this Business Adapter.

Download locations:

.NET Framework 2.0

<http://www.microsoft.com/downloads/details.aspx?familyid=0856EACB-4362-4B0D-8EDD-AAB15C5E04F5&displaylang=en>

ReportViewer (requires .NET Framework 2.0 installed first)

<http://www.microsoft.com/downloads/details.aspx?familyid=8a166cac-758d-45c8-b637-dd7726e61367&displaylang=en>

MDAC 2.8 (not needed on Windows XP SP2 which already includes this)

<http://www.microsoft.com/downloads/details.aspx?familyid=78cac895-efc2-4f8e-a9e0-3a1afbd5922e&displaylang=en>

SQL 2005 Express SP2

<http://www.microsoft.com/downloads/details.aspx?familyid=31711D5D-725C-4AFA-9D65-E4465CDFF1E7&displaylang=en>

Mitchell1/CSBP Adapter – Most Current Version

<http://developer.cisco.com/web/sbp/wikidocs;jsessionid=935194FCC55263DDB5556E9159E794D7.liferay-portal1?src=/wiki/display/SBP/Business+Adapter+Inventory#http://developer.cisco.com/wiki/display/SBP/Business%20Adapter%20Inventory?>

Cisco client TSP

(Download from your Cisco Communications server)

* IIS for Windows XP located on the Windows XP Operating System installation CD and installs using add/remove programs. You'll find this option in the Add/Remove Windows Components location.



Installing the Cisco Smart Business Portal Components

This document includes instructions for installing the following Smart Business Portal and Business Adapter components on the machine that is also hosting the Mitchell Manager application. Prerequisites must be installed prior to installing the Cisco Smart Business Portal components. Although the components can be installed in any order, you will typically install in the following order: Web Service, Web Application, Business Adapter.

- Prepare the Server
- Cisco Web Service
- Cisco Web Application
- Cisco Mitchell 1 Adapter
- Cisco Smart Business Portal Client

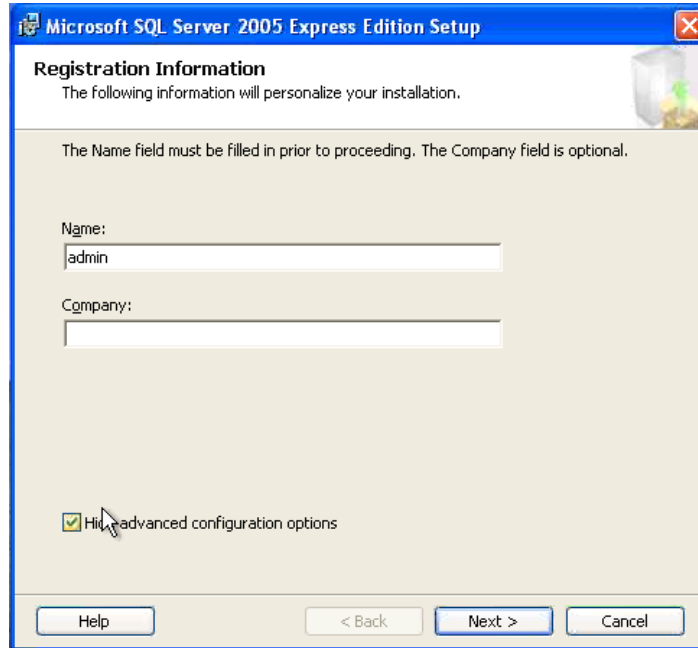
Prepare the Server

The typical environment for the Mitchell 1 is a Windows XP Pro machine hosting Mitchell Manager. To prepare this machine the following software must be installed in this order: .Net Framework 2.0; MDAC 2.8; SQL 2005 Express; ReportViewer.

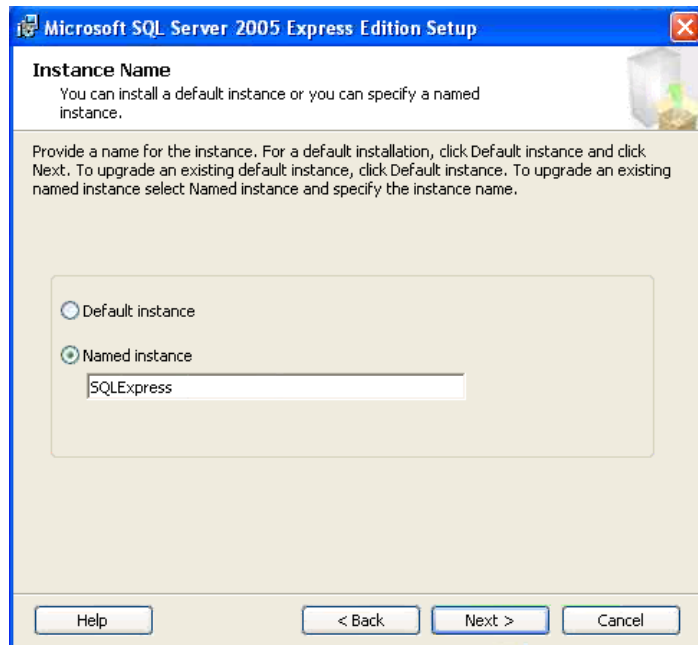
.Net and MDAC: Install .Net Framework 2.0 and MDAC 2.8. MDAC is already included with Windows XP Pro SP2 and higher.

SQL 2005: Install SQL 2005 Express

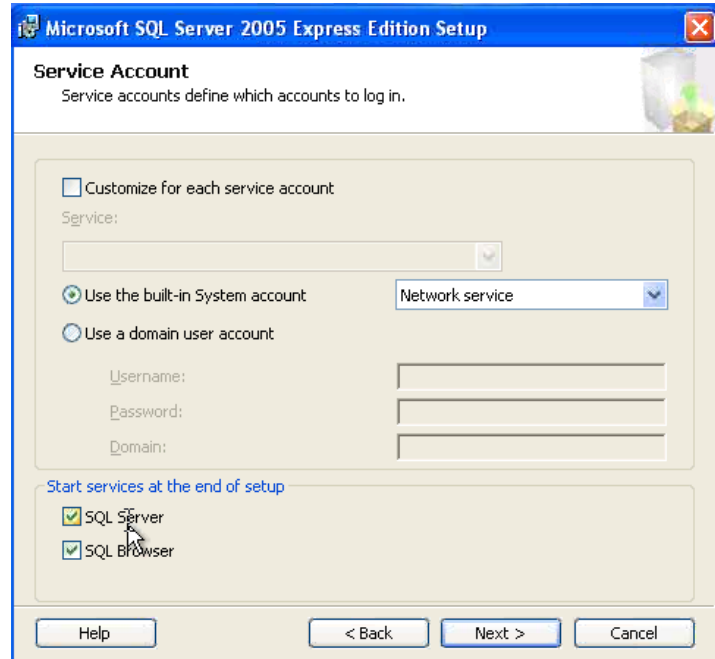
- Use the URL mentioned above to download Windows SQL 2005.
- Begin install using defaults except as noted below
 - On the Registration Information screen uncheck the hide advanced configuration options box.



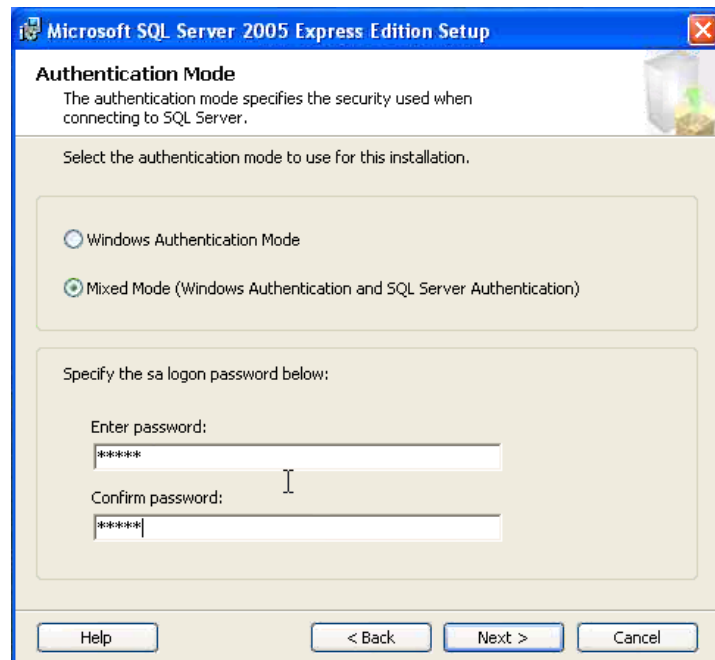
- On the Instance Name screen select Named Instance and the name SQLExpress.



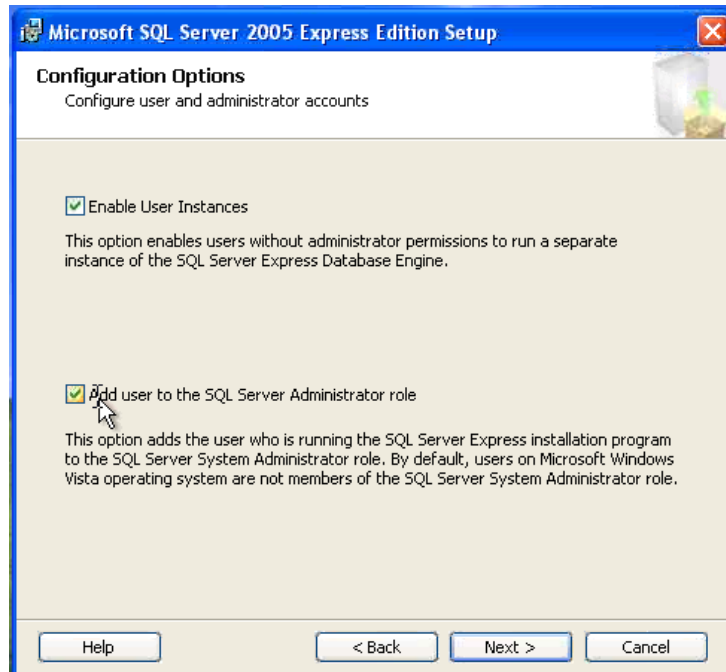
- On the Service Account screen select the SQL Browser box.



- On the Authentication Mode screen select Mixed Mode and enter the password “cisco” (all lower case)



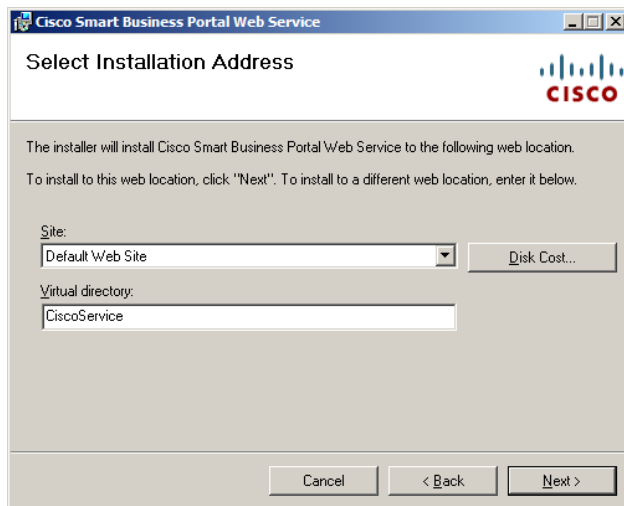
- On the Configuration Options screen select the Add user to the SQL Server Administrator role



ReportViewer: Install ReportViewer.exe from the download location mentioned above.

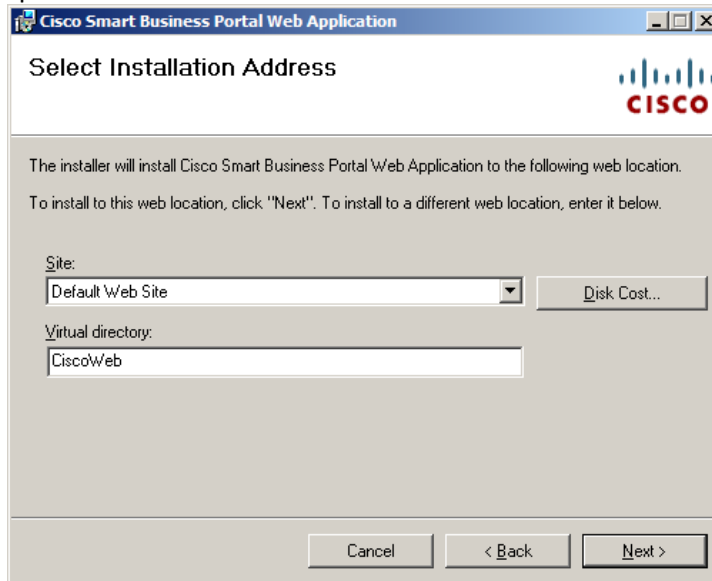
Cisco Web Service

- Execute the “CiscoWebService.msi” file on your application server.
- By default the web service virtual directory is named “CiscoService”. If you would like to change this, you can do so here. In most instances, you should not need to change any of the default installation options. If you make changes to the virtual directory you will also update your Smart Business Portal configuration later in this guide (Editing the Server Configuration).



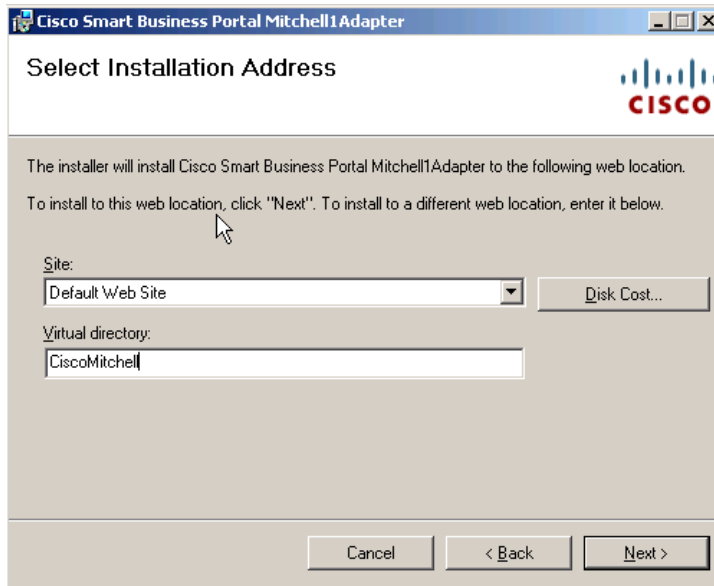
Web Application

- Execute the “CiscoWebApplication.msi” on your application server.
- By default the web application virtual directory is named “CiscoWeb”. If you would like to change this, you can do so here. In most instances, you should not need to change any of the options in a default installation.



Mitchell 1 Business Adapter

- Execute the “CiscoMitchellAdapter.msi” file on your application server.
- By default the Mitchell adapter virtual directory is named “CiscoMitchell”. If you would like to change this, you can do so here. In most instances, you should not need to change any of the options in a default installation. If you do make changes to the virtual directory you will also need to update your Smart Business Portal configuration.



Now you've installed the Cisco Web Service, Cisco Application Service, and the Cisco Mitchell1 Business Adapter, you are now ready to run the included Diagnostic Tool and Server Configuration Utility.

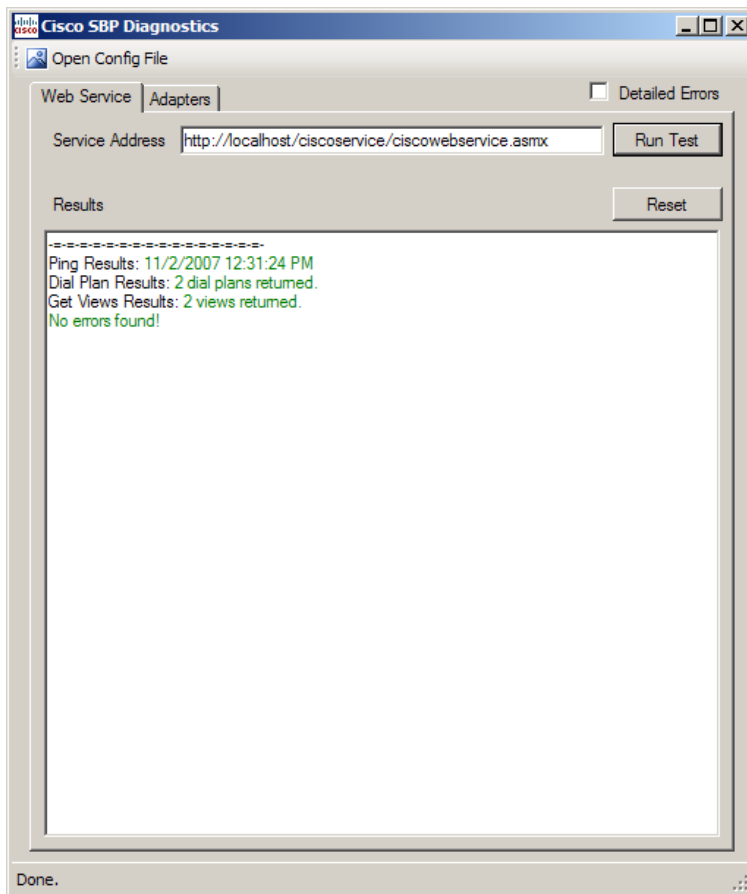
Diagnostic Tool

The included diagnostic tool checks and validates your installation. To open this tool: go to the Start>Programs>Cisco>Cisco Smart Business Portal>Server Tools. Open the tool, if you receive a message that the configuration file cannot be found, then click the [Open Config File](#) button in the toolbar and select the appropriate app.config file (by default this should be c:\inetpub\configuration\app.config). Use this tool to check server service configuration settings and the business adapter functionality.

Using the Tool – Web Service Tab

Check the service address text box. This should be set to the URL for the web service, the same one that is entered into the Cisco Smart Business Portal Client. By default it will be: <http://localhost/ciscoservice/ciscowebsevice.asmx>. Replace “localhost” with the name, or IP address of the server where you installed the CSBP web services.

To test that you’ve entered the URL and server name correctly, click the [Run Test](#) button. The tool will run a series of tests to ensure that you have configured the web service correctly.

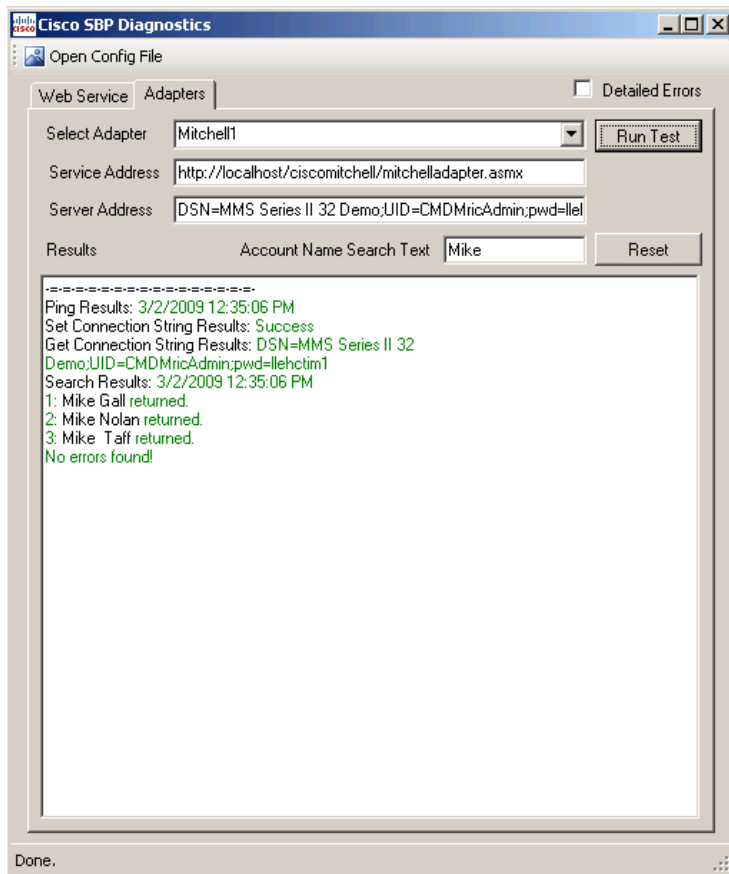


All results should return without errors. If you get all successes from the Web Service test above, select the [Adapters](#) tab.

Adapters Tab

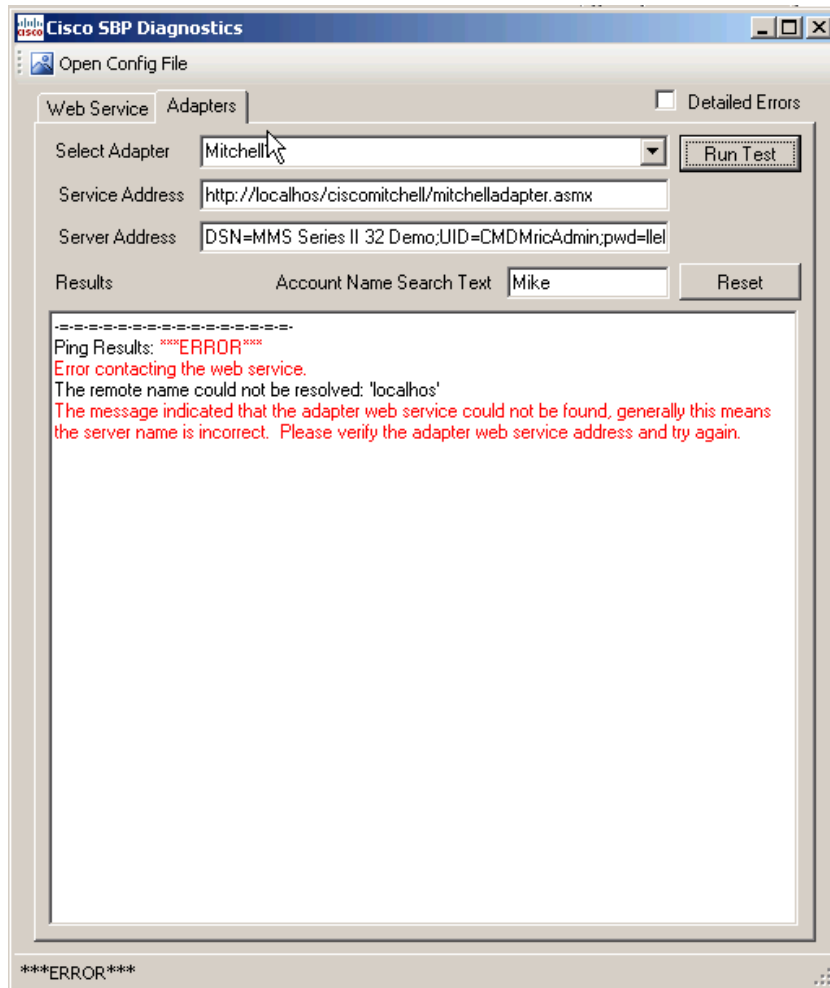
- **Select Adapter:** click down arrow and select the appropriate adapter.
- **Account Name Search Text:** enter a valid searchable name from the Mitchell Manager.
- **Service Address:** run test with “localhost” address (default result):
 - If test is NOT successful return to prior steps to validate correct data.
 - If test is successful replace “localhost” with the CSBP web services server name (or IP address) and retest.
 - If test with CSBP server name is successful move on to next step.
 - If test with CSBP server name is NOT successful a DNS issue may be present. Go to the Server Configuration utility section below to properly set your DSN and connection string in the Server Address field

Success for both tests indicates the Mitchell1 Business Adapter is properly configured.



Troubleshooting: If you get errors, check the error, and open the Server Configuration Tool to modify any incorrect paths as described by the error. Save your changes. Re-open the Diagnostic tool, or simply reload the configuration file by clicking the [Open Config File](#) button on the toolbar.

In the example below, the error shows the Business Adapter Web service has an incorrect server name. In this case, the Mitchell Business Adapter server address is incorrect and the listed server doesn't exist. The server name should be corrected to point to the actual CSBP server. Replacing "localhos" with "localhost" or the actual CSBP server name should fix the below example. The Service Address values are stored in the app.config file which is configured using the Cisco Server Configuration Utility. For the correct Server Address, please refer to the Server Configuration utility in the following section.





Editing the Server Configuration Settings

Server configuration settings are stored in the app.config file located in your server's configuration directory (c:\inetpub\Configuration). There are two methods for setting portal configurations:

- Use the Server Configuration Utility – START>ALL PROGRAMS>CISCO>SMART BUSINESS PORTAL>SERVER CONFIGURATION TOOLS>SERVER CONFIGURATION UTILITY
- Manually edit the app.config file – use find and replace to ensure all values are updated

Using the Server Configuration Utility

The Server Configuration Utility allows you to customize all portal settings. There are four main areas or tabs in this tool: Server Settings; Adapters; Views; and Performance Counters.

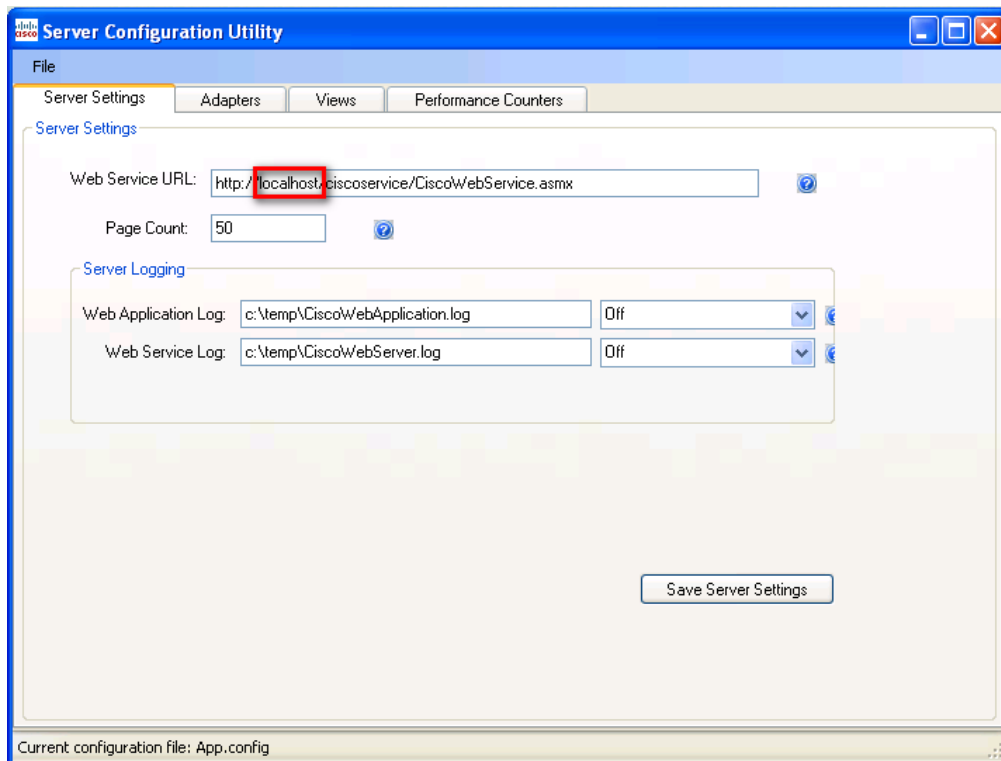
Server Settings Tab

The Server Settings tab allows you to change the following values:

- Web Service URL: This field defines the URL used to connect to the Smart Business Portal Web Service.
- Page Count: You can limit the search results. The Server Settings provides a feature to limit the number of search via the page counts setting (acceptable values are 1-50).
- Web Application Log: Location and mode
- Web Service Log: Location and mode

ACTIONS:

- Replace "localhost" with the name or IP address of the server hosting web services.
- Select the [Save Server Settings](#) button.



Adapters Tab

The Adapters tab allows you configure the proper adapter, as well as its supporting database. These are critical steps that must be completed accurately to allow the Cisco Smart Business Portal to function. The configurations steps are broken into two categories: Adapters and Database:

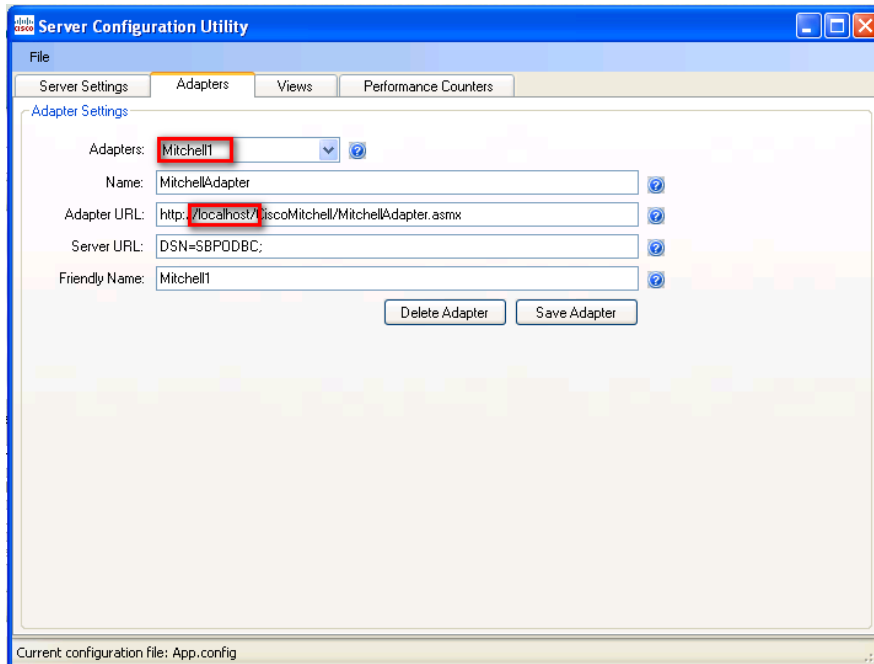
NOTE: Use can also use this tool to remove unused adapters that may be included. If Great Plains, Microsoft CRM, or Archtics Adapters are not used, they can be removed.

- Choose the adapter you wish to remove in the Adapter Window
- Select the [Delete Adapter](#) button.

Adapters – Actions:

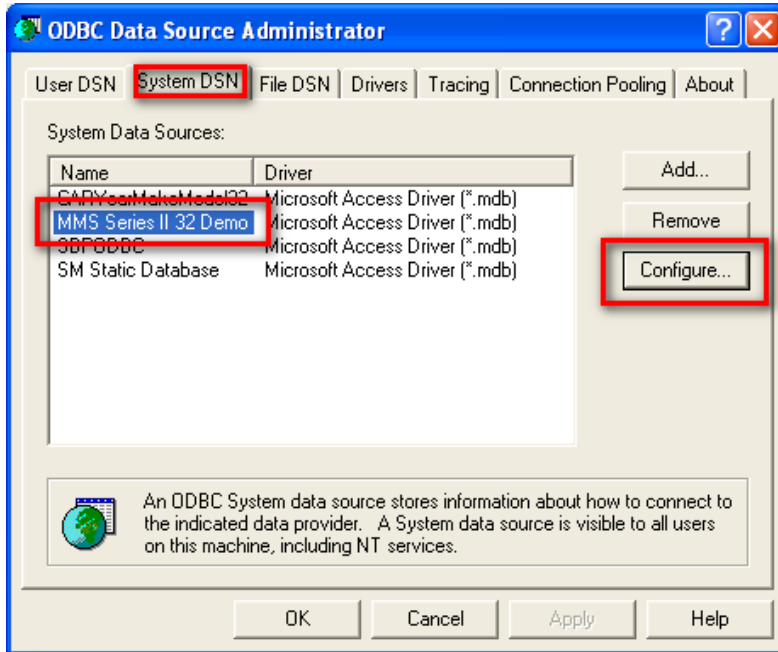
- In the [Adapter](#) window select the appropriate adapter. The remaining fields will fill with default information for that adapter.
- In the [Adapter URL](#) field replace “localhost” with the name or IP address of the server hosting web services. For example, if you are editing the Mitchell adapter, your URL should be either:
 - (http://Mitchell *web services server name*/Ciscomitchell/MitchellAdapter.asmx)

- ([http://Mitchell web services IP address/Ciscomitchell/MitchellAdapter.aspx](http://Mitchell%20web%20services%20IP%20address/Ciscomitchell/MitchellAdapter.aspx))
- Select the **Save Adapter** button.

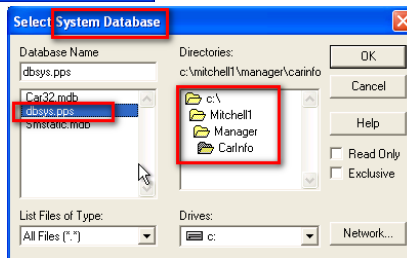
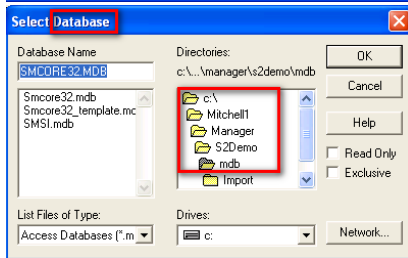
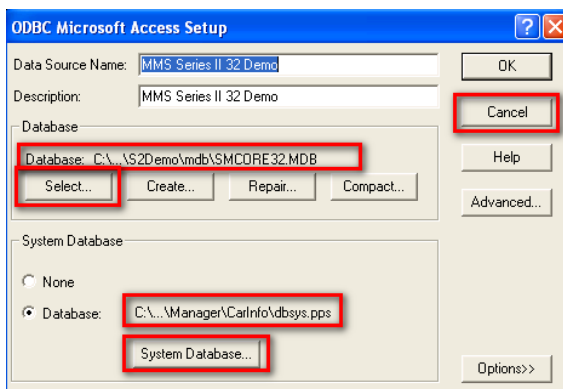


Databases – Actions:

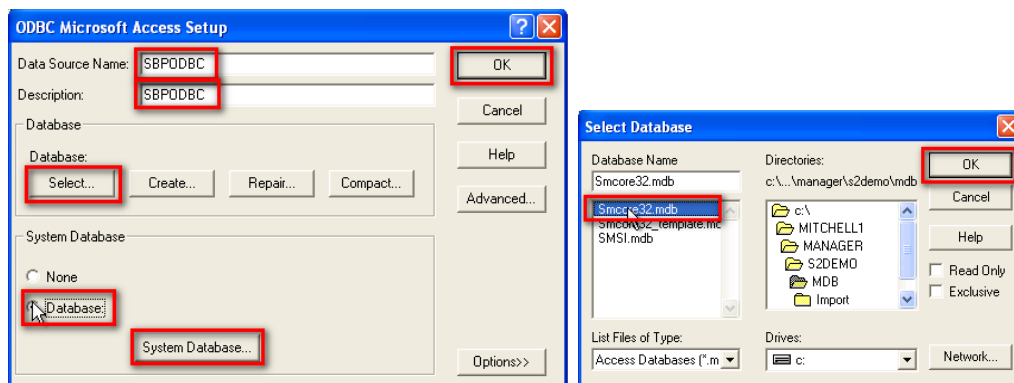
- **IMPORTANT:** Do not change any of the data about the existing databases as this could cause the Mitchell1 application to fail. Always select “Cancel” to get out of any program unless directed to do otherwise.
- Open the [Data Source \(ODBC\)](#) application in the [Windows Administrative Tools](#):
START>CONTROL PANEL>ADMINISTRATIVE TOOLS>Data Source (ODBC)
- Select the [Systems DSN](#) tab
- Highlight “[MMS Series II 32 Demo](#)” and select “[Configure...](#)”



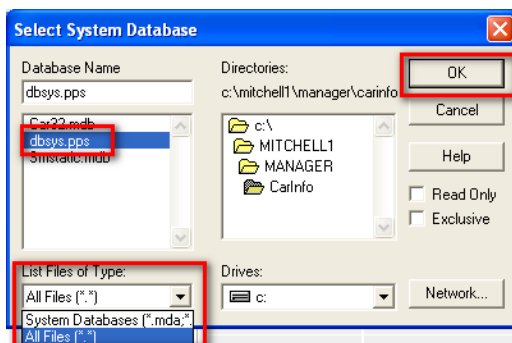
- On the Setup Screen note the path displayed in the Database section.
 - NOTE: if you cannot see the entire path click the [Select](#) button and determine the path
- On the Setup Screen note the path displayed in the System Database section.
 - NOTE: if you cannot see the entire path click the [System Database](#) Button
- Once both paths are noted select the [Cancel](#) button.



- Now you want to create a database similar to [MMS Series II 32 Demo](#) named **SBPODBC**.
 - Again Open the Data Source (ODBC) application in the Windows Administrative Tools: START>CONTROL PANEL>ADMINISTRATIVE TOOLS>Data Source (ODBC)
 - Select the **Systems DSN** tab
 - Select **Add**
 - Scroll down and highlight **Microsoft Access Driver (*.mdb)** and select **Finish**
 - In the Data Source Name window type in **SBPODBC**.
 - In the Description window type in **SBPODBC**.
 - In the Database square click **Select**.
 - Choose the **SMCORE32.mdb** database and click **OK**



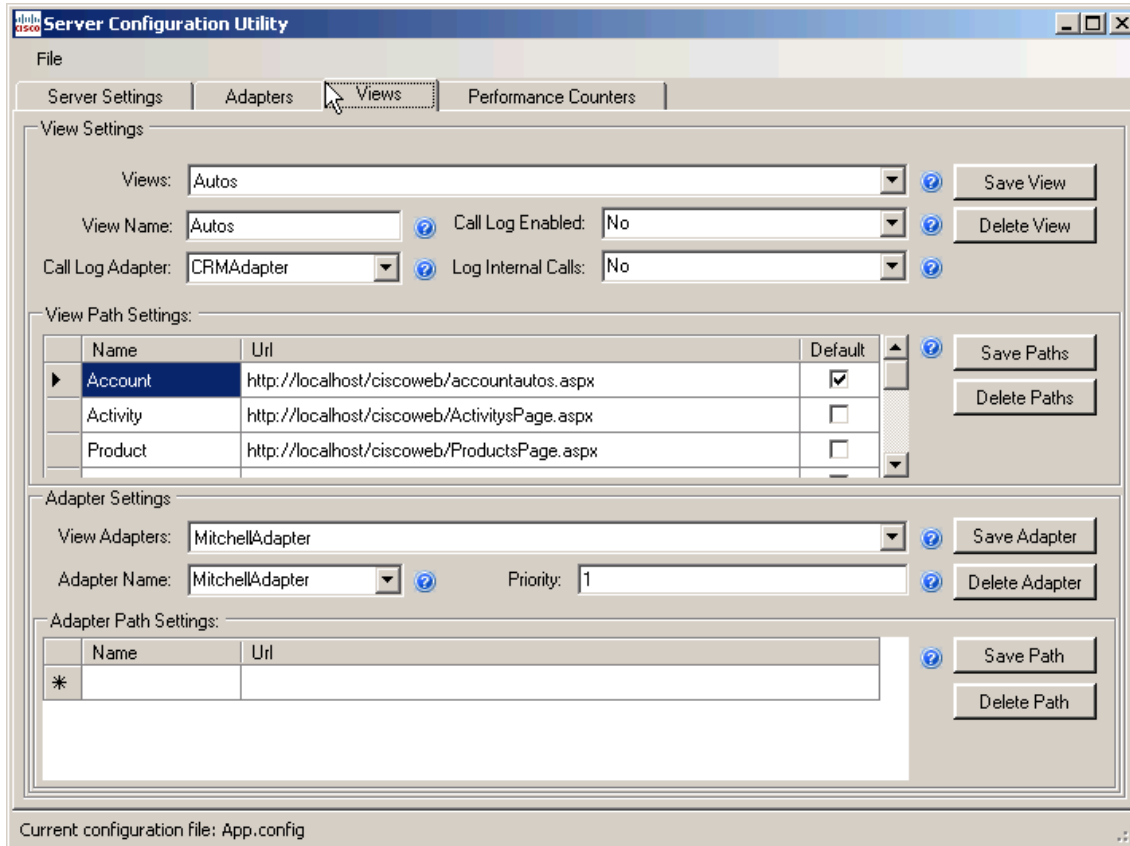
- You will be returned to the ODBC Microsoft Access Setup Screen.
- In the System Database section select the **Database** radio button
- Select the **System Database** button
- On the Select System Database screen select **All Files (*.*)**
- Scroll down and highlight **dbsys.pps**
- Select **OK**



- You will be returned to the ODBC Microsoft Access Screen. Select **OK**
- Once the Database has been created you will be returned to the ODBC Data Source Administrator Screen. Select **OK**.

Views Tab

The views tab allows you to edit the CSBP Adapters Views.



The View Path Settings section describes the location of the individual Webparts for the Mitchell Business Adapter. To edit them:

- You must select a view from the *Views*, window above. For example, choose *Auto*.
- Edit the URL location to reflect either the Web services server name, or IP address. **Note:** do not change the name field; only the URL.

To edit the Adapter Path Settings defines the location of Mitchell data used to populate each individual Webpart:

- You must select a view from the *Views*, window above. Choose *Auto*.
- Edit the URL location to reflect the appropriate address. **Note:** do not change the name field; only the URL.

Note: Each section has its own *Save* button. You must save each section individually.



Performance Counter

The Performance Tab is not applicable with the Mitchell solution.

Manual Editing

When manually editing the app.config file, edit the following values:

- References to the Smart Business Portal Web Service
 - If you made changes to the default installation name for the Cisco Web Service, please insert the actual name here.
 - **Line 59** - 16 lines from end of file (see example and modify localhost to your server)
<WebSericeUrl uri="http://localhost/ciscoservice/ciscoWebService.asmx"
- References to the new Smart Business Portal Mitchell 1 Web Adapter. (**Line 12**)
- References to web view paths (**begins on Line 31**)
- Use Search and Replace for fast modification of this file.

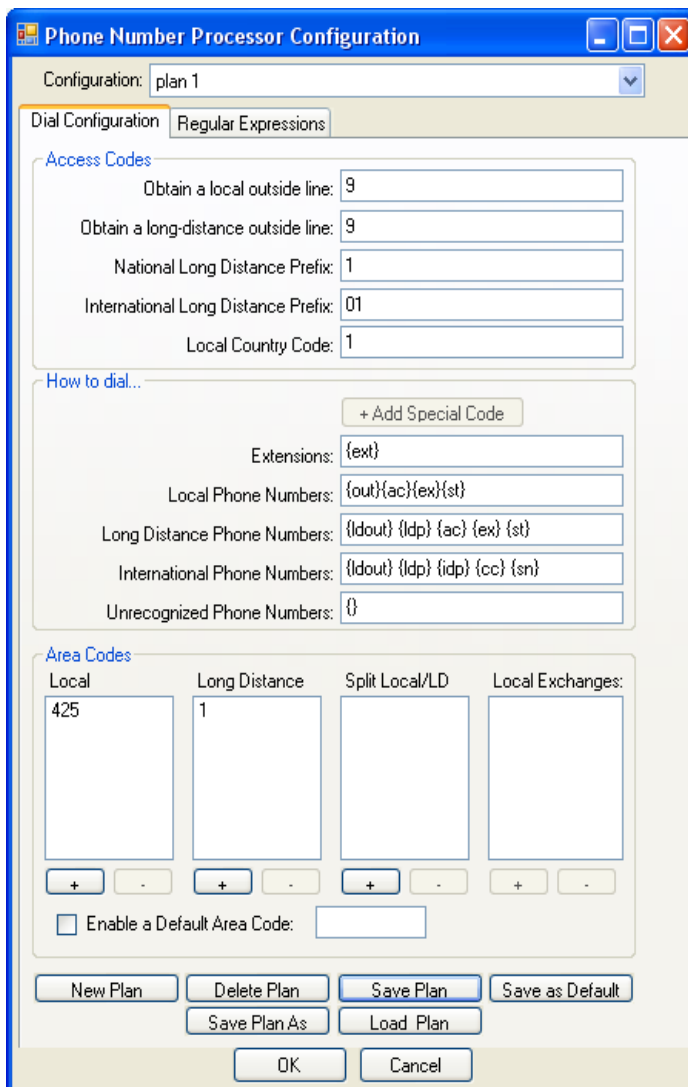
Using the Phone Number Processor Utility

The Phone Number Processor (PNP) tool sets outbound dialing properties for the TAPI driver. Outbound click-to-dial functionality is dependent upon successful completion of this step. NOTE: This portion must be completed by the Cisco Voice Engineer.

There are two tabs in this tool; Dial Configuration and Regular Expressions.

Dial Configuration

This tab allows create/modified / deleting dial plans. Changes are held in memory until the save dial button is press. An indicator (bell) that dial plan has not been save is displayed on the lower right corner as shown. After pressing the “Save Plan” button the icon will go away and the plan is written to the hard drive.



The screenshot shows the "Phone Number Processor Configuration" dialog box with the "Dial Configuration" tab selected. The configuration is for "plan 1".

Access Codes

- Obtain a local outside line: 9
- Obtain a long-distance outside line: 9
- National Long Distance Prefix: 1
- International Long Distance Prefix: 01
- Local Country Code: 1

How to dial..

- + Add Special Code
- Extensions: {ext}
- Local Phone Numbers: {out}{ac}{ex}{st}
- Long Distance Phone Numbers: {ldout} {ldp} {ac} {ex} {st}
- International Phone Numbers: {ldout} {ldp} {idp} {cc} {sn}
- Unrecognized Phone Numbers: {}

Area Codes

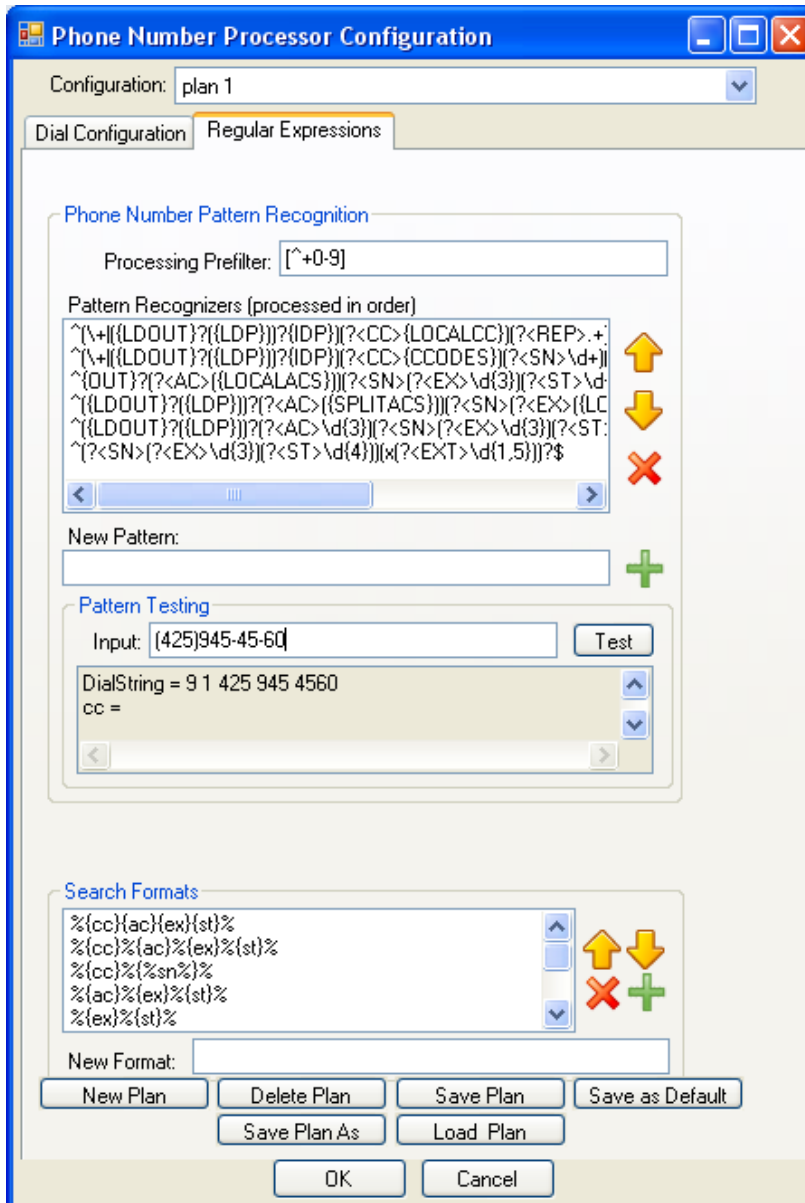
Local	Long Distance	Split Local/LD	Local Exchanges:
425	1		

Below the area codes are plus and minus buttons for each field. There is also a checkbox for "Enable a Default Area Code:" with an empty text field.

Buttons at the bottom: New Plan, Delete Plan, Save Plan, Save as Default, Save Plan As, Load Plan, OK, Cancel.

Regular Expression Tab

This tab is to define the Regular expressions for pattern matching. A new pattern can be entered in the new pattern item and also test the end result using the pattern testing section. Enter a phone number as shown:



The screenshot shows the "Phone Number Processor Configuration" dialog box with the "Regular Expressions" tab selected. The configuration is for "plan 1".

Phone Number Pattern Recognition

Processing Prefilter:

Pattern Recognizers (processed in order)

```

^\+({LDOUT})?({LDP})?({IDP})?({CC}{LOCALCC})?({REP}>.+
^\+({LDOUT})?({LDP})?({IDP})?({CC}{CCODES})?({SN}>\d+)
^({OUT})?({AC}{LOCALACS})?({SN}>?<EX>\d{3})?({ST}>\d
^({LDOUT})?({LDP})?({AC}{SPLITACS})?({SN}>?<EX>({LC
^({LDOUT})?({LDP})?({AC}>\d{3})?({SN}>?<EX>\d{3})?({ST
^({SN}>?<EX>\d{3})?({ST}>\d{4})(x?<EXT>\d{1,5})?&#x24;

```

New Pattern:

Pattern Testing

Input: Test

DialString = 9 1 425 945 4560

cc =

Search Formats

```

%{cc}{ac}{ex}{st}%
%{cc}%{ac}%{ex}%{st}%
%{cc}%{sn}%
%{ac}{ex}{st}%
%{ex}{st}%

```

New Format:

Buttons: New Plan, Delete Plan, Save Plan, Save as Default, Save Plan As, Load Plan, OK, Cancel

Preparing/Configuration of Web Parts

The Cisco Smart Business Portal provides information in Web Parts. Most of the information is read from the Mitchell 1 application but certain Web parts provide additional functionality beyond just reading from Mitchell 1. Personalization and Customer Feedback are examples of such features. Please refer to CSBP Client Usage Doc for more information on each Web Part. The information below needs to be preconfigured prior to connecting the CSBP clients.

Customer Feedback Web Part

This web part will send feedback to a predetermined email address. It will typically be used to send information to management that they need to know about right away. There are two installation scenarios for installing this web part: hosted email services (Gmail, GoDaddy, Hotmail, etc.), or internal email systems (Exchange, MS Small Business Server, etc.). In either case you will need to know the following information:

- Recipient email address
- Sending email address (to be created in Google Gmail)
- SMTP service address
- SMTP service port (if required, although this is usually not the case)
- Does the account require a secure login?
 - If yes need email account username
 - If yes need email account password

Hosted Email Service – Example (using Gmail)

- Set up a sending email account in Gmail (You may use this procedure to set up a recipient account as well)
 - Go to www.google.com
 - Select Gmail on the top left portion of the screen
 - Select [Create an account](#) button.
 - Follow the instructions to create an account.
 - Make note of the login name (e.g. vocalmash@gmail.com)
 - Make note of the password (e.g. v0calmash)
- On the server hosting the CSBP web services open the [web.config](#) file. It will be found at [C:\Inetpub\wwwroot\CiscoWeb](#) unless an alternative location was specified during installation.

```

<appSettings>
  <add key="configurationpath" value="configuration\app.config"/>
  <add key="feedbackemail" value="manager@gmail.com"/>
  <add key="personalizationenable" value="false"/>
  <add key="smtpport" value=""/>
  <add key="enablessl" value="yes"/>
</appSettings>
<connectionStrings>
  <server>
    <validation validateIntegratedModeConfiguration="false"/>
  </system.webserver>
</system.net>
<smtpSettings>
  <smtp deliveryMethod="Network" from="sending@gmail.com" >
    <network host="smtp.gmail.com" userName="sending@gmail.com" password="password"/>
  </smtp>

```

The image shows a snippet of a web.config file with several lines highlighted in red. A blue box labeled "To Settings" points to the "feedbackemail" value, and another blue box labeled "from Settings" points to the "from" attribute in the smtpSettings section.

- In the **To Settings** group – (starting at line 11 on the `web.config` file)
 - On the `<add key="feedbackemail"` line - add the email address of the recipient in the value statement (e.g. value="`manager@gmail.com`" />)
 - On the `<add key="smtpport"` line - add an SMTP port in the value statement if necessary (e.g. value="`448`" />). With Gmail do not make any changes to this value.
 - On the `<add key="enablesl"` line – change the value statement to “yes” or “no” depending upon if SSL encryption is required for the sending account. With Gmail set this value to yes.
- In the **From Settings** group – (starting at line 22 on the `web.config` file)
 - Add the sending email address to the from statement (e.g. from="`sending@gmail.com`"")
 - Change the network host statement to reflect the SMTP service address. (e.g. host="`smtp.gmail.com`")
 - Add the sending email account username and password to the username and password statement (e.g. userName="`sending@gmail.com`" password="`p@ssword`")

Internal Email Server - Example (using exchangeserver.com)

- On the server hosting the CSBP web services open the `web.config` file. It will be found at `C:\inetpub\wwwroot\CiscoWeb` unless an alternative location was specified during installation.

```

<appsettings>
  <add key="configurationpath" value="configuration\app.config" />
  <add key="feedbackemail" value="manager@exchangeserver.com" />
  <add key="personalizationenable" value="false" />
  <add key="smtpport" value="" />
  <add key="enablesl" value="no" />
</appsettings>
<system.web>
  <validation validateIntegratedModeConfiguration="false" />
</system.web>
<system.net>
  <mailsettings>
    <smtp deliveryMethod="Network" from="sending@exchangeserver.com" >
      <network host="mail.exchangeserver.com" defaultCredentials="true" />
    </smtp>
  </mailsettings>
</system.net>

```

The image shows a screenshot of the `web.config` file with several lines highlighted in red boxes. A blue box labeled "To Settings" points to the `<add key="feedbackemail" value="manager@exchangeserver.com" />` line. Another blue box labeled "From Settings" points to the `<smtp deliveryMethod="Network" from="sending@exchangeserver.com" >` line. The `<network host="mail.exchangeserver.com" defaultCredentials="true" />` line is also highlighted in red.

- In the **To Settings** group – (starting at line 11 on the `web.config` file)
 - On the `<add key="feedbackemail"` line - add the email address of the recipient in the value statement (e.g. value="`manager@exchangeserver.com`" />)
 - On the `<add key="smtpport"` line - add an SMTP port in the value statement if necessary (e.g. value="`448`" />). Ask your systems administrator for this value.
 - On the `<add key="enablesl"` line – change the value statement to “yes” or “no” depending upon if SSL encryption is required for the sending account.
- In the **From Settings** group – (starting at line 22 on the `web.config` file)
 - Add the sending email address to the from statement (e.g. from="`sending@exchangeserver.com`"")



- Change the network host statement to reflect the SMTP service address. This could be a URL, or an IP address. (e.g. network host="mail.exchangeserver.com")
- If authentication is not required leave the statement defaultCredentials="true"
- If authentication is required, replace the defaultCredentials="true" statement with the username and password statements. (e.g. username="sending@exchangeserver.com" password="p@ssword")

NOTE: SMTP References

For more information on installing an SMTP server in IIS 6 please visit here:

<http://www.microsoft.com/technet/prodtechnol/WindowsServer2003/Library/IIS/e4cf06f5-9a36-474b-ba78-3f287a2b88f2.mspx?mfr=true>

To learn how to test your SMTP connection please visit:

<http://technet.microsoft.com/en-us/library/bb123686.aspx>

Personalization of Web Parts

In order to improve employee productivity and efficiency, the portal can be customized. Each web part may be moved, placed or minimized. To configure personalization and enable, or disable:

- Create:
 - Create a folder named "App_Data" at c:\inetpub\wwwroot\cisoweb\App_Data (the default install location for the Cisco Web Application install).
 - Right click the folder and select Properties>Security.
 - Add ASPNET and Network Services groups with the following permissions: read & execute, read, list folder content, and write.
 - Select Add>
 - In the "Enter the object names to select" box enter ASPNET>OK.
 - Add check marks to the permissions listed above in the "Allow" column.
 - Select OK>
 - Repeat this process for NETWORK SERVICE.
- Edit File to enable/disable personalization: Modify the default view file located on the application server local directory at C:\Inetpub\wwwroot\CiscoWeb\web.config.
 - Open the Web.config with a text editor like notepad.
 - On line 10 < add key="personalizationenable" value="false"/>
 - Change false to true to enable personalization
 - Save the changes.

Camera Web Parts

The Camera Web Part allows for integration of images from a video camera with the information presented in the Cisco Smart Business Portal. The current Mitchell/CSBP Installer will support only a single WVC210 camera. For those owning a legacy Linksys WVC200 camera there is a separate installer that can be used. The installation procedures are the same for both types of video cameras and are recorded below.

The camera functionality is determined by modifications to the CSBP `web.config` file. This file is located by default in `c:\inetpub\wwwroot\CiscoWeb` directory.

- Open the `web.config` files with a text editor like notepad
- At the bottom of this file locate you will find two statements that may need modification:
 - Following the statement `<setting name="CameraIP" serializeAs="String">` you will see a line that says `<value></value>`. Place the IP address of the camera in the following format: `<value>your-camera-ip-address</value>` (e.g., `<value>192.168.1.229</value>`).
 - If using the WVC200 camera, please include `http://` (e.g., `<value>http://192.168.1.229</value>`).
 - The following the statement- `<settings name="ShowCamera" serializedAs="String">` `<value></value>`- must be set to "True". (e.g., `<value>True</value>`)

```

</system.web>
<applicationSettings>
  <Cisco.UCCDT.Server.WebApplication.Properties.Settings>
    <setting name="CameraIP" serializeAs="String">
      <value></value>
    </setting>
    <setting name="ShowCamera" serializeAs="String">
      <value>True</value>
    </setting>
  </Cisco.UCCDT.Server.WebApplication.Properties.Settings>
</applicationSettings>
</configuration>

```

Launch Pad Web Part

The Launch Pad is a feature that is customizable and allows the users to click to launch external websites or selected applications. **NOTE:** Icons are not required, simple text hyperlinks similar to our Google Search example is a minimum configuration. To modify the Launch Pad:

- **Open:** locate the "Links.xml" file in `C:\inetpub\wwwroot\CiscoWeb\lib` and open in Notepad.exe. Links.xml lists all URL links and icons that are shown in the Launch Pad web part.
- **Add or Remove URL:** Copy a line of code beginning with `<item url=. . . >` and paste it to the existing list. Modify the URL as necessary by editing the information within the quotation marks on the line.
 - **Example:** Here is the syntax for the Google Search hyperlink
`<item url="http://www.google.com" name="Google Search" target="_blank" />`
- **Adding ICONs:** To add icons to a URL add an image command at the end of the URL string. It must be placed after the "target=" statement and before the final `/>` characters.



- **Example:** `<item url="http://www.worldpac.com/" name="WorldPac" target="_blank" image="http://www.repairshopdirector.com/images/worldpac.gif" />`

Installing the Smart Business Portal Client

Installing the TAPI driver

The appropriate Cisco TSP (TAPI) driver must be installed and configured prior to installing the CSBP client. Each Cisco UC System includes a TAPI driver that is compatible with your Cisco UC System version.

For instruction on installing TAPI visit the Cisco TAPI installation documentation here:

http://www.cisco.com/en/US/docs/voice_ip_comm/cucm/tapi_dev/3_3_2/install/TAPIns.html

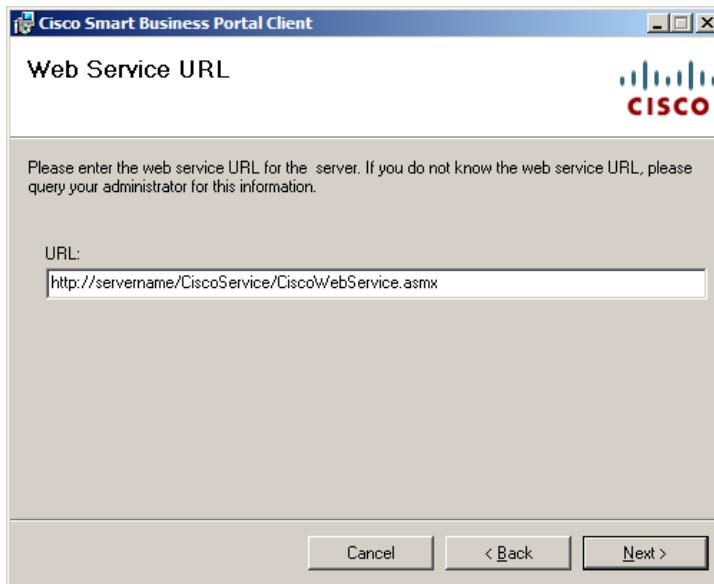
or review the additional TAPI videos tutorials here:

<http://developer.cisco.com/web/sbp/wikidocs?src=/wiki/display/SBP/Cisco+Smart+Business+Portal+Installation+Videos>

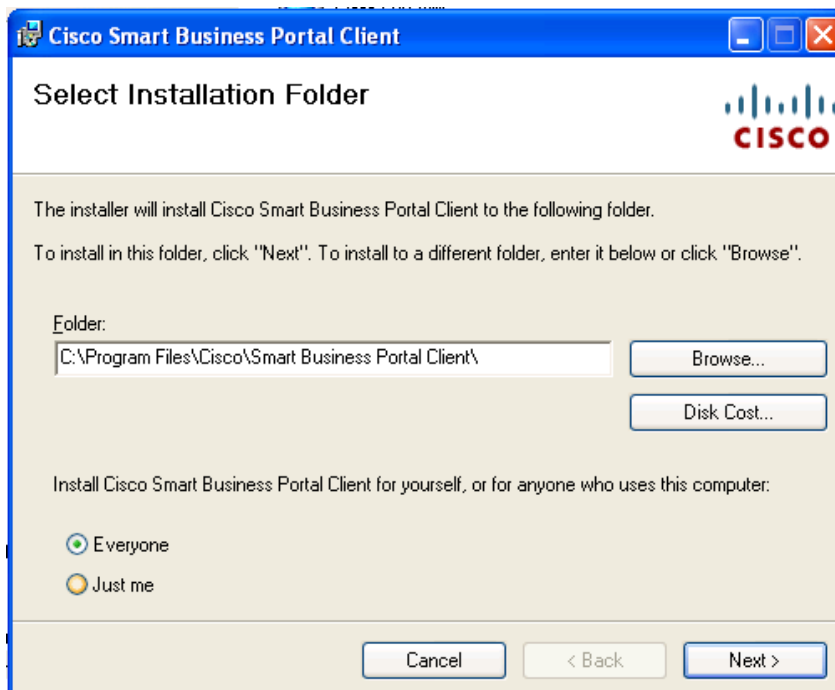
Installing the Client

NOTE: All prerequisites must be completed prior to installing the CSBP client software

- Install the client included in the Mitchell Business Adapter package. – Cisco SBP Client.msi
- Follow wizard instructions for installation.
- When Web Service URL message appears replace “servername” with the name or IP address of the server hosting web services.

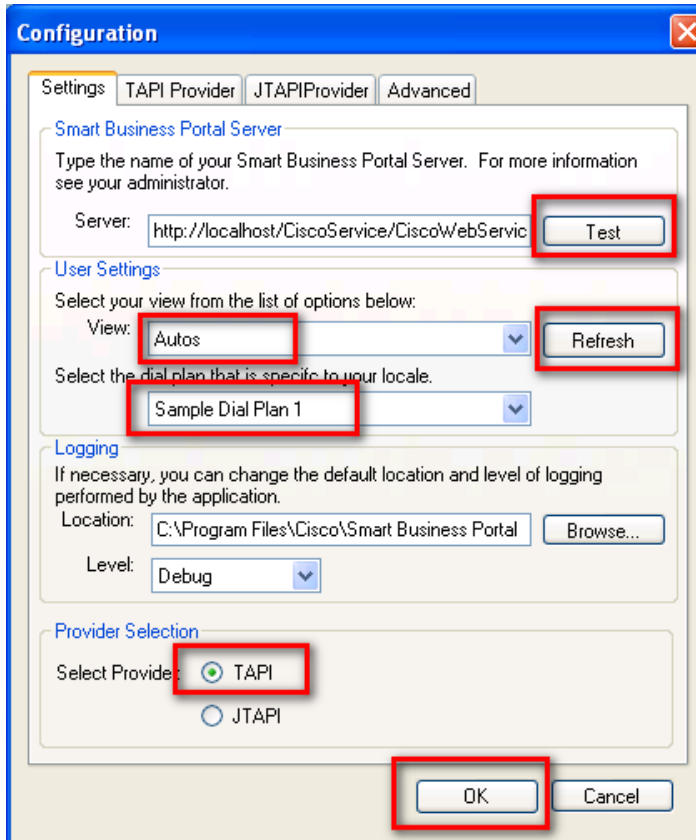


- On the Select Installation Folder we recommend you select the “everyone” radio button before proceeding.



Launch and Test

- Once installed the client will create a shortcut on the desktop. Right-click on this icon and select “Pin to Start Menu”.
- Double-click the desktop CSBP icon, or select Start>Cisco Smart Business Portal.
- Select “Client Settings” and the following configuration page will launch.



Configuration

Settings | TAPI Provider | JTAPI Provider | Advanced

Smart Business Portal Server
Type the name of your Smart Business Portal Server. For more information see your administrator.

Server:

User Settings
Select your view from the list of options below:

View:

Select the dial plan that is specific to your locale.

Logging
If necessary, you can change the default location and level of logging performed by the application.

Location:

Level:

Provider Selection
Select Provider:

TAPI
 JTAPI

- Click the Test button. This should return a message which says “Successfully connected to the server.”
- Click the Refresh button. This should load all the appropriate views into the view window.
- The dial plan window should also show the dial plans created for this adapter. Select the appropriate one.
- Select the TAPI Provider tab and highlight the appropriate Cisco line. Select OK
- NOTE: The first time these steps are performed it may take a few minutes for the portal to restart. Subsequent restarts should be much faster. You may need to login after each time you restart the portal.
- Test configurations by searching for a name or number that is in your Mitchell database.
- Test receiving a phone call.
- Test outbound dialing by double-clicking on any number displayed on your test subjects page.

Settings Tab

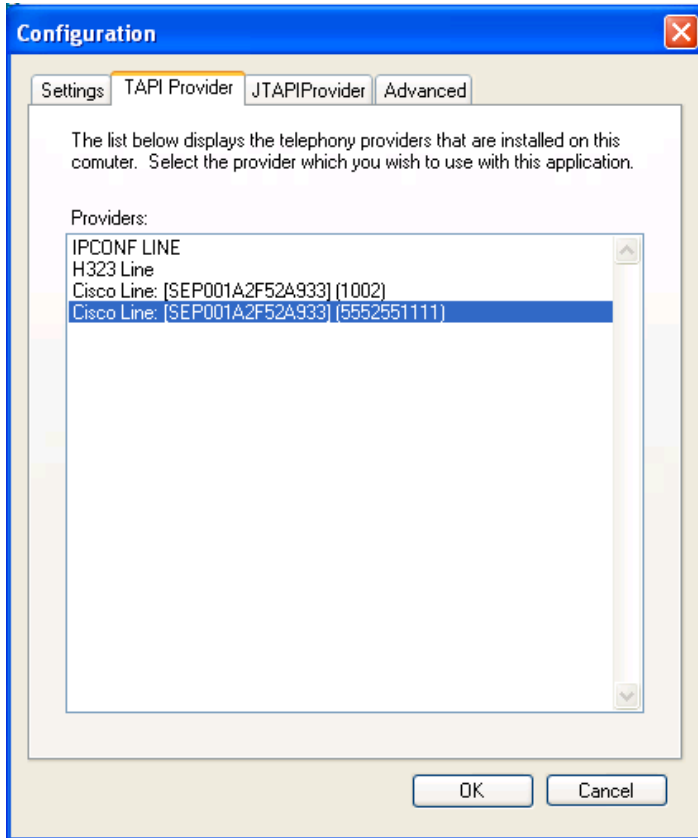
On the Configuration dialog, use the **Settings** tab to enter the following:

Field	Definition
Server	Enter the name of the Server, or the full path to the Web service. If the server name is entered, the Windows Client assumes the default path. Before continuing, click the Test button to attempt a connection to the server.
User Settings	When the server is entered, the lists of available views and dial plans are populated from the server.
View	Select the appropriate View from the list of views presented in the selection list. The views are configured on the server and represent information from the back-end. The Windows Client uses the selected view to determine what information to display when a line becomes active. You can click the Refresh button to update the list as needed.
Dial plan	Select the most appropriate Dial Plan to use primarily to format numbers for the click-to-dial functionality. The Dial Plan are configured on the server
Logging	You can change the way the application logs events. The user can select both the location of the log file and the level of logging desired. The log file is a simple text file and any text editor could be used to read the file.
Location	The location selector will be a text box with a browse button that launches the standard file picker dialog. The user can enter any path and file name as long as he/she has permissions to write to the indicated directory. In the event that the user does not have sufficient permissions, an error dialog will be displayed, and the user must change the chosen directory
Level	The logging level selector will be a list of items, drop-down or otherwise, in which only one option may be selected. The options will range in detail from no logging to log everything.

TAPI Provider Tab

The Windows Client application will attempt to automatically detect the appropriate TAPI provider to use for telephony communication.

If the application is unable to find an appropriate provider, the **TAPI Provider** tab will display a list of all installed TAPI providers on the client and prompt the user to select the appropriate TAPI line.

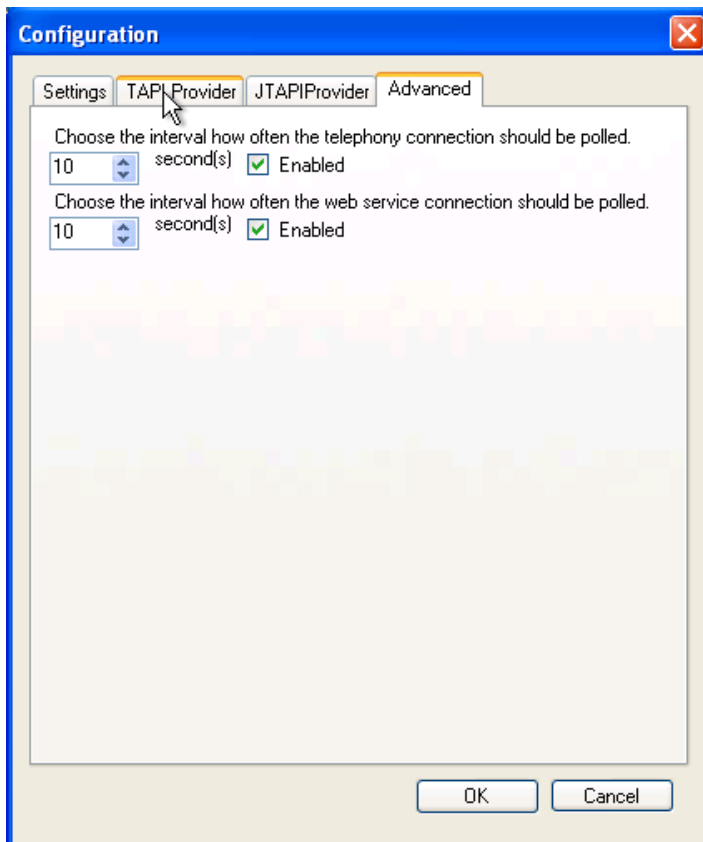


Use the **TAPI Provider** tab to enter the following:

Field	Definition
Providers	Select the appropriate Cisco TAPI telephony provider from the list of providers on this computer. See your System Administrator for more information.

Advanced Tab

The Advance tab allows you to set the intervals in which the Windows Client polls the telephony and Web service.



Use the **Advance** tab to enter the following:

Field	Definition
Telephony connection	Polling cycle for the telephony is working
Web service connection	Polling cycle to determine if the web service is working



Additional Smart Business Portal Resources

Home Page: <http://developer.cisco.com/web/sbp/home>

Video and tutorials:

<http://developer.cisco.com/web/sbp/wikidocs?src=/wiki/display/SBP/Cisco+Smart+Business+Portal+Instructional+Videos>

FAQ:

<http://developer.cisco.com/web/sbp/wikidocs?src=/wiki/display/SBP/Cisco+Smart+Business+Portal+FAQ>

Success Stories and Case Studies: <http://www.cisco.com/en/US/products/ps9669/index.html>

Support options:

Developer Support:

<http://developer.cisco.com/web/sbp/wikidocs?src=/wiki/display/SBP/Developer+Support#http://developer.cisco.com/wiki/display/SBP/Developer%20Support?>

CSBP Wiki Forum: http://developer.cisco.com/web/sbp/forums/-/message_boards/category/1062714