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Unified Messaging Integration with CIC

Technical Reference

Abstract

This content describes configuring Customer Interaction Center when using a third-party Unified Messaging solution.

For the latest version of this document, see the PureConnect Documentation Library at: http://help.genesys.com/cic.

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Customer Interaction Center third-party Unified Messaging

Customer Interaction Center supports third-party solutions for Unified Messaging, such as Microsoft Exchange Server 2007 and Microsoft Exchange Server 2010. Unified Messaging centralizes a variety of communications such as voicemail, fax, and e-mail using a single repository and delivers those communications to users.

This document provides information and procedures for integrating Customer Interaction Center with a Unified Messaging solution.

Configuring third-party Unified Messaging

The third-party Unified Messaging environment is configured in Interaction Administrator. The following Interaction Administrator containers are used to support third-party Unified Messaging:

- Lines Transmissions between the Customer Interaction Center server and the Unified Messaging server are done through a Session Initiation Protocol (SIP) line.
- Stations Routing of voicemail, fax, and e-mail message between the Customer Interaction Center server and the Unified Messaging server is handled by a Unified Messaging station configured for the third-party Unified Messaging provider.
- Users Communications routing is handled by the Unified Messaging station for those users whose accounts are set to use the Unified Messaging station.

To configure third-party Unified Messaging:

- 1. Create a SIP line for Unified Messaging and configure it.
- 2. Create a Unified Messaging station and configure it.
- 3. Set User accounts to use the Unified Messaging station.
- 4. If you have multiple Unified Messaging servers available, specify and prioritize a list of proxies to provide for failover and load balancing.
- 5. Encrypt the SIP signaling stream and the Real-Time Protocol (RTP) stream to prevent malicious attacks over the connections.
- 6. Configure certificates on the Customer Interaction Center server and Unified Messaging server for connection authentication.

Creating a line

To configure a line for Unified Messaging, first create a SIP line to handle communication between the Customer Interaction Center server and the Unified Messaging server.

The following settings are for configuring an Exchange Server 2010 Unified Messaging server.

Selecting transport settings

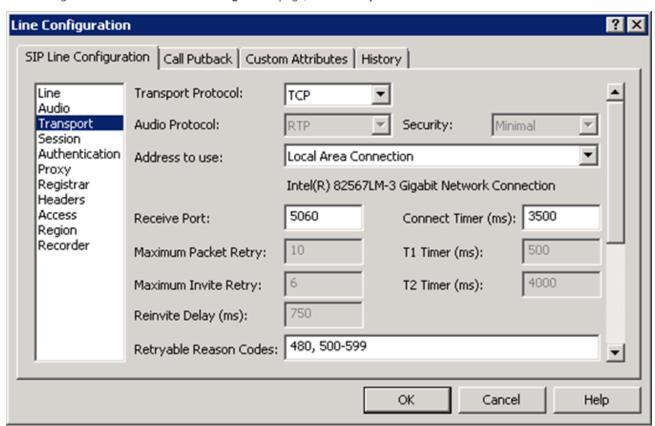
The Transport Protocol, Audio Protocol, and Receive Port must be set based on the Voice over Internet Protocol (VoIP) security setting for the Unified Messaging Dial Plan associated with the Unified Messaging server.

To select transport settings:

1. In the right pane of the **Lines** container, double-click the line to configure.

The **Line Configuration** dialog box is displayed.

2. In the navigation box on the SIP Line Configuration page, click Transport.



3. Provide the following information:

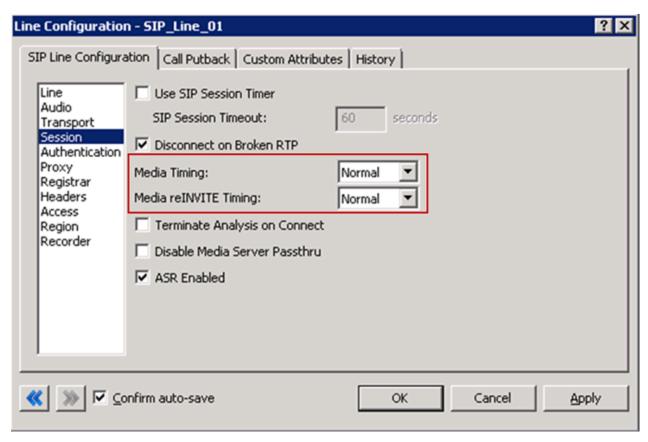
For	Configure	
Unsecured TCP Line	Transport Protocol	TCP
	Audio Protocol	RTP
	Receive Port	5060
Unsecured TLS Line	Transport Protocol	TLS
	Audio Protocol	RTP
	Receive Port	5061
Secured TLS Line	Transport Protocol	TLS
	Audio Protocol	SRTP
	Receive Port	5061

Disabling delayed media

Some SIP devices do not support delayed media, which may cause calls initiated from a Customer Interaction Center client to fail to connect, immediately disconnect or have one-way audio. Therefore, you need to disable delayed media for INVITE and re-INVITE requests.

To disable delayed media:

- In the right pane of the Lines container, double-click the line to configure.
 The Line Configuration dialog box is displayed.
- 2. In the navigation box of the SIP Line Configuration page, click Session.



3. In the Media Timing and Media relNVITE Timing boxes, select Normal.

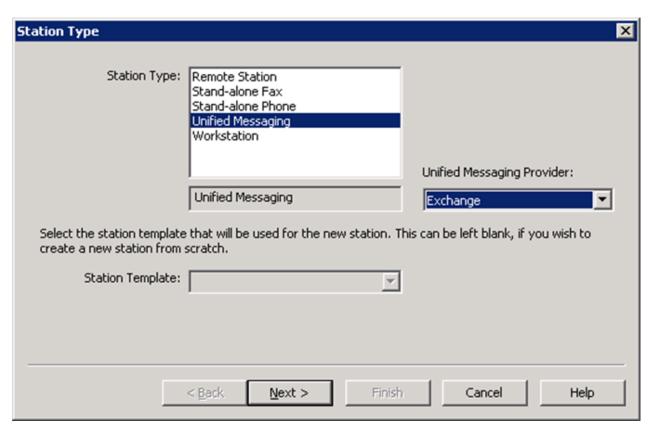
Creating a station

To handle call routing between the Customer Interaction Center server and the Unified Messaging server, create a Unified Messaging station in Interaction Administrator.

To create a station:

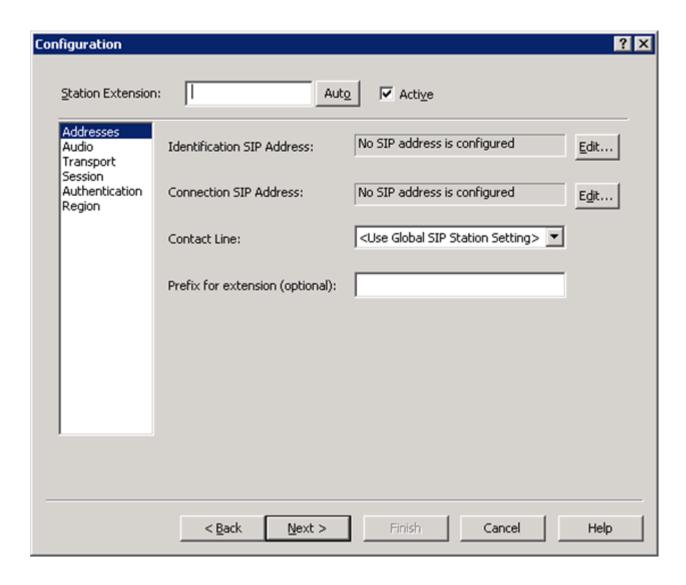
- Click the Stations container and press the Insert key.
 The Entry Name dialog box is displayed.
- 2. Type the station name and click **OK**.

The **Station Type** dialog is displayed.



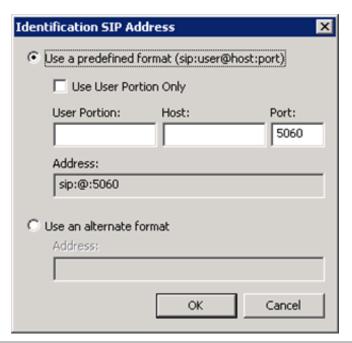
- 3. In the Station Type list, click Unified Messaging.
- 4. In the Unified Messaging Provider box, click Exchange.
- 5. Click Next.

The Configuration dialog box is displayed.



Configuring SIP addresses

1. On the Addresses page in the Configuration dialog box, click Edit to display the Identification SIP Address dialog box.

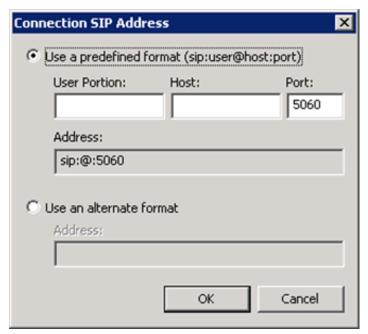


2. Specify the identification SIP address to be included in the From header on INVITE messages sent by the Unified Messaging server and click **OK**.

Note:

Typically, this address is either the IP address or Fully Qualified Domain Name (FQDN) of the Unified Messaging server.

3. On the Addresses page in the Configuration dialog box, click Edit to display the Connection SIP Address dialog box.



4. Specify the connection SIP address to be included in the To header on INVITE messages sent to the Unified Messaging server and click **OK**.

Note:

Typically, this address is a pilot number, the IP address, or FQDN of the Unified Messaging server. The port is 5060 for TCP or User Datagram Protocol (UDP), or 5061 for Transport Layer Security (TLS). This address is also used for connection if a proxy is not used.

For Exchange Server 2010, the **User Portion** must match the Pilot identifier for a Unified Messaging Hunt Group associated to the Unified Messaging IP Gateway created for the Customer Interaction Center server.

5. On the **Addresses** page in the **Configuration** dialog box, in the **Contact Line** box, click the SIP line created to handle communication between the Customer Interaction Center server and the Unified Messaging server.

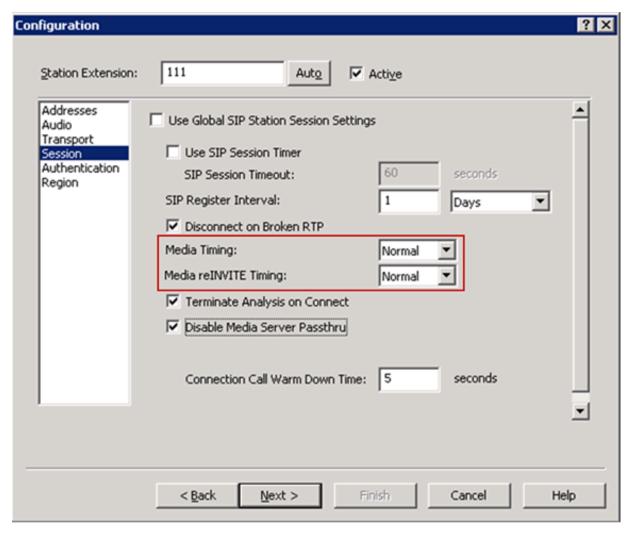
For more information, see Creating a line.

Disabling delayed media

Some SIP devices do not support delayed media, which may cause calls initiated from a Customer Interaction Center client to fail to connect, immediately disconnect or have one-way audio. Therefore, you need to disable delayed media for INVITE and re-INVITE requests.

To disable delayed media:

1. In the navigation box in the Configuration dialog box, click Session.



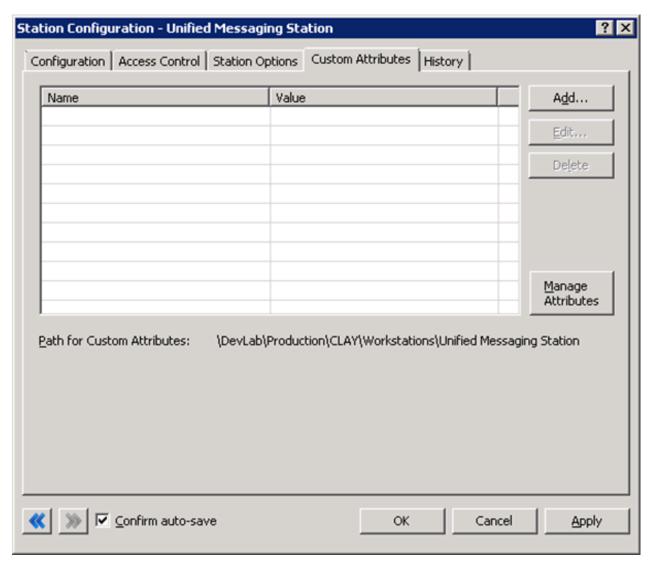
2. In the Media Timing and Media relNVITE Timing boxes, select Normal.

Adding a custom attribute

By default, if a user authenticates with the Customer Interaction Center server, the user will be placed into the Interactive Voice Response (IVR) on the Customer Interaction Center server and will be required to dial a subscriber number to enter the IVR on the Unified Messaging server. You can change the default behavior of the Unified Messaging station by adding a custom attribute.

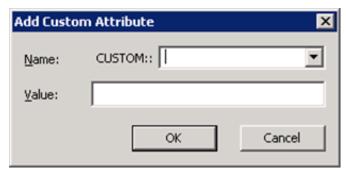
To add a custom attribute:

- 1. In the right pane of the **Stations** container, double-click the Unified Messaging station. The **Station Configuration** dialog box is displayed.
- 2. Click the Custom Attributes tab.



3. Click Add.

The Add Custom Attribute dialog box is displayed.



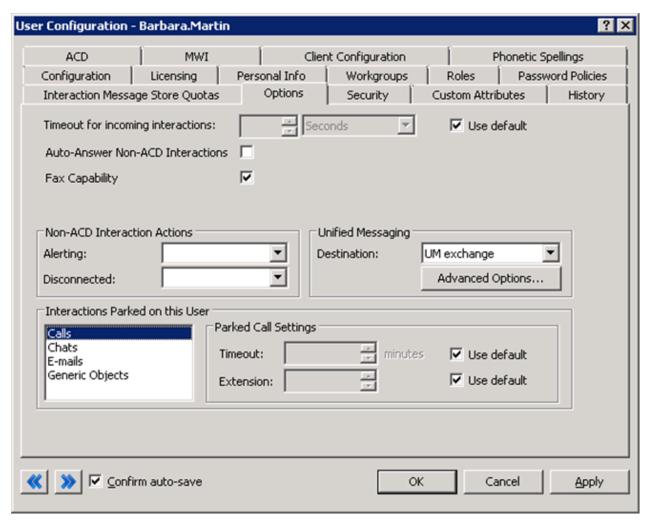
- 4. In the Custom box, click Divert for TUI.
- 5. In the Value box, type 1 and click OK.

Configuring Users

Configure Users to use a third-party Unified Messaging provider in the Interaction Administrator User container.

To configure a user:

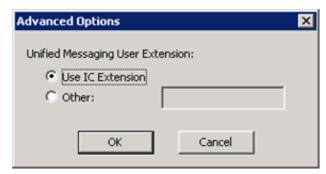
- 1. In the right pane of the **Users** container, double-click the name of the user to configure. The **User Configuration** dialog box is displayed.
- 2. Click the Options tab.



3. In the **Destination** box, click the Unified Messaging station you created to handle communications routed between the Customer Interaction Center server and the Unified Messaging server.

For more information, see **Creating a station**.

4. Click **Advanced Options** to display the **Advanced Options** dialog box.



5. Specify the value to include in the From header on INVITE messages when accessing a user's mailbox or the Diversion header on INVITE messages when calls are transferred to the Unified Messaging server.

For Exchange Server 2010, provide the following:

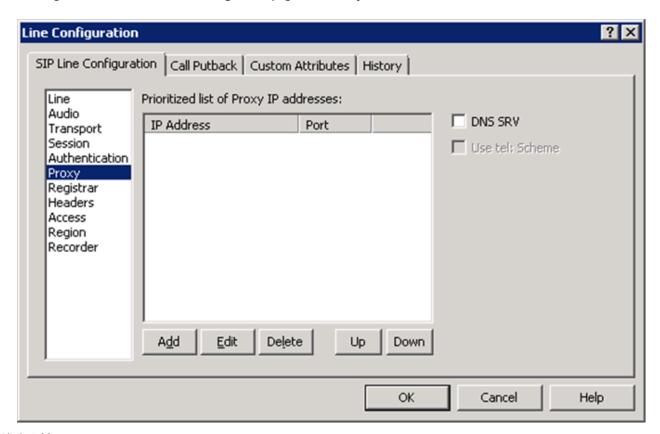
For	Configure
Use IC Extension	Select this option when the user's Customer Interaction Center extension matches the user's Unified Messaging extension.
Other	Select this option and provide one of the following: The user's Unified Messaging extension The E.164 address entered for the user, such as +13178723000 The SIP address for the user, prefixed with sip:.The address defaults to the user's e-mail address, such as sip:john.smith@mycompany.com.

Providing for failover and load balancing

There are two options for providing for failover and automatically balancing the load when multiple Unified Messaging servers are available. The first option is to set up a proxy for each of the Unified Messaging servers. The second option is to set up a single proxy that's used by all the Unified Messaging servers. For more information, see the Interaction Administrator online Help.

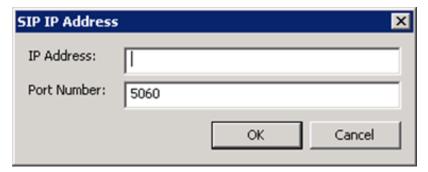
To set up multiple proxies:

- 1. In the right pane of the **Lines** container, double-click the line to configure. The **Line Configuration** dialog box is displayed.
- 2. In the navigation box on the SIP Line Configuration page, click Proxy.

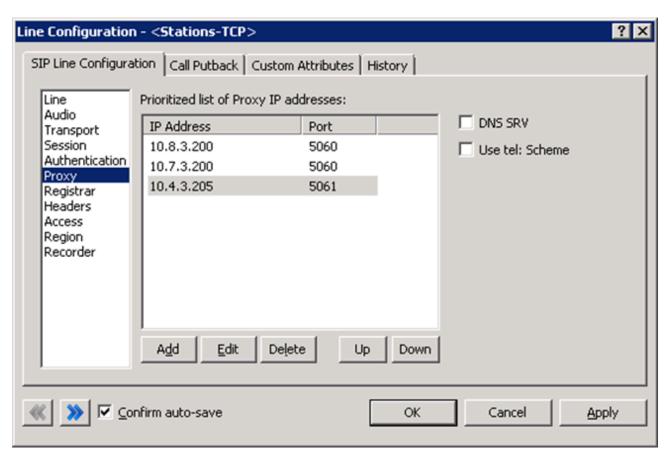


Click Add.

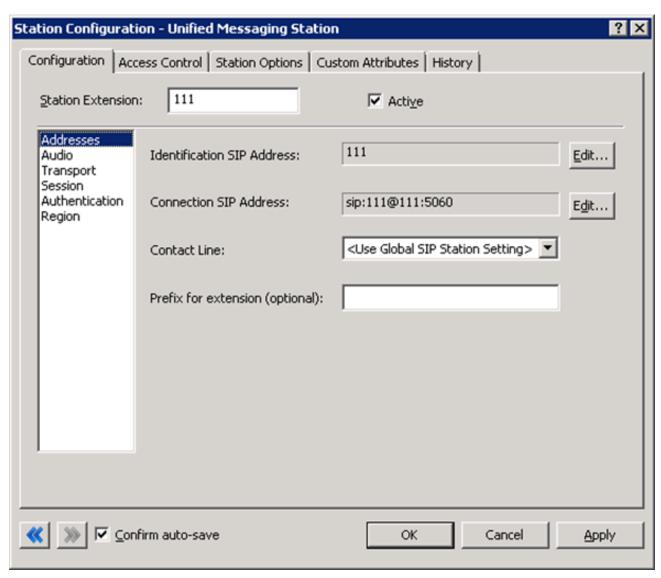
The SIP IP Address dialog box is displayed.



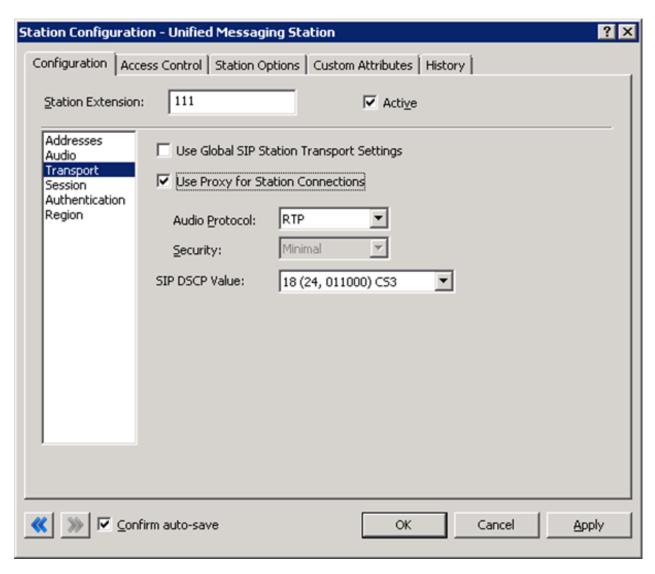
- 4. In the IP Address and Port Number boxes, specify the SIP IP Address and 5060.
- 5. Click OK.
- 6. Add a proxy for each Unified Messaging server.



- 7. On the SIP Line Configuration page, use the Up and Down buttons to arrange the proxies in the order in which they are to be used.
- 8. In the right pane of the **Stations** container, double-click the Unified Messaging station.

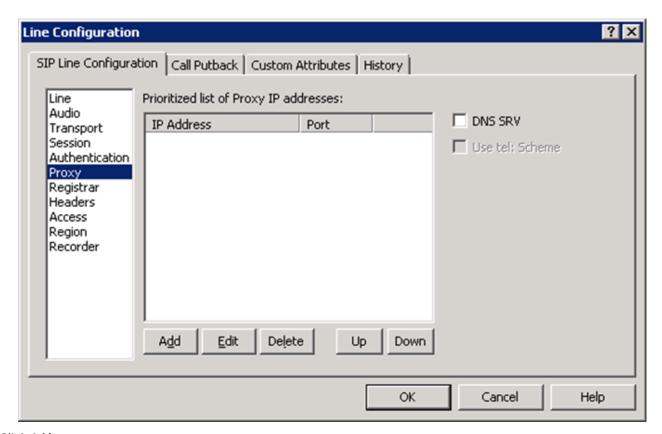


9. In the navigation box on the Configuration page, click Transport and enable the Use Proxy for Station Connections check box.

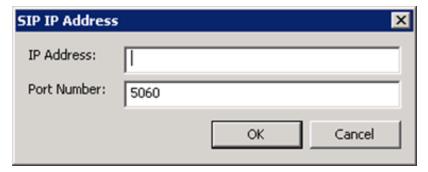


To set up a single proxy:

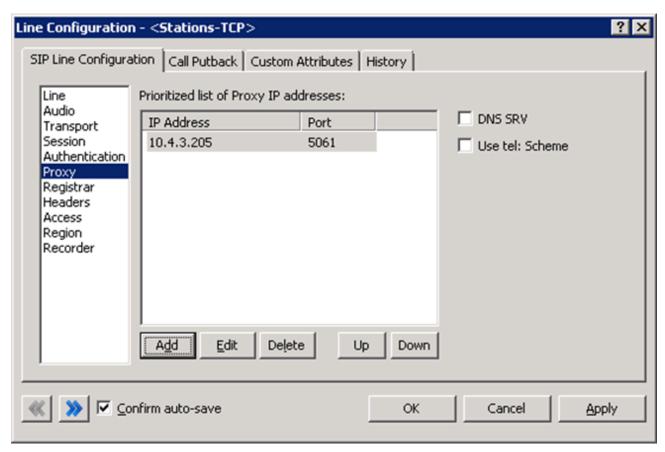
- 1. In the right pane of the **Lines** container, double-click the line to configure. The **Line Configuration** dialog box is displayed.
- 2. In the navigation box on the SIP Line Configuration page in the Line Configuration dialog box, click Proxy.



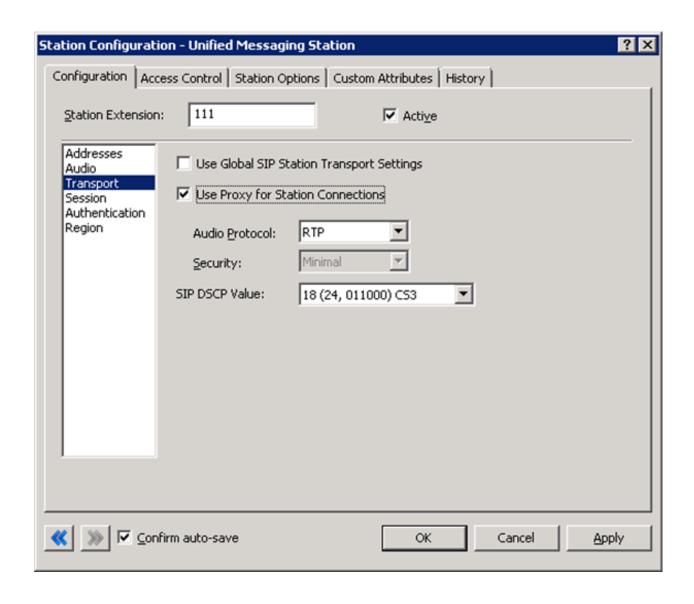
Click Add.
 The SIP IP Address dialog box is displayed.



4. In the IP Address and Port Number boxes, specify the SIP IP Address and 5060.



- 5. In the right pane of the **Stations** container, double-click the Unified Messaging station. The **Station Configuration** dialog box is displayed.
- 6. In the navigation box on the Configuration page, click Transport and enable the Use Proxy for Station Connections check box.

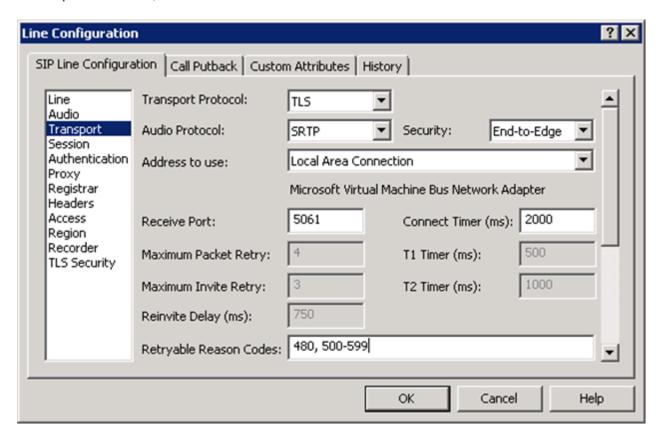


Encrypting SIP signaling and RTP streams

You can encrypt the SIP signaling stream and the RTP stream using TLS.

To enable encryption on the SIP signaling stream:

- In the right pane of the Lines container, double-click the line to configure.
 The Line Configuration dialog box is displayed.
- 2. In the navigation box on the SIP Line Configuration page, click Transport.
- 3. In the Transport Protocol box, click TLS.



To enable encryption on the RTP stream:

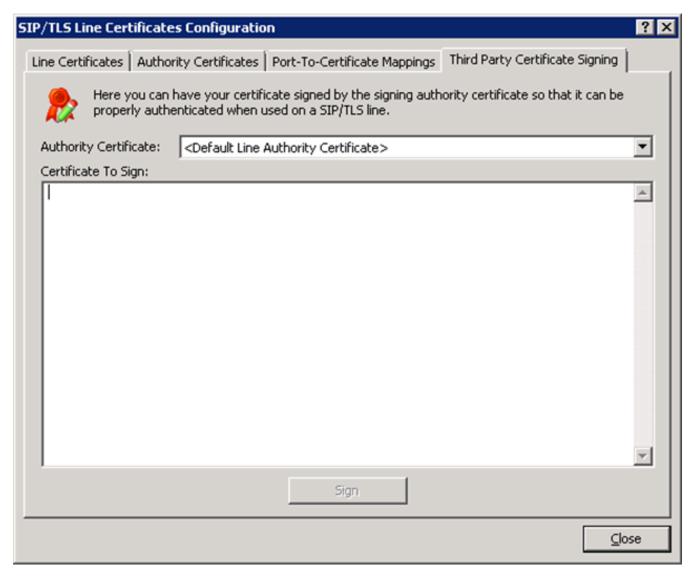
- 1. In the right pane of the **Lines** container, double-click the line to configure. The **Line Configuration** dialog box is displayed.
- 2. In the navigation box on the SIP Line Configuration page, click Transport.
- 3. In the Audio Protocol box, click SRTP.

For more information on these settings, see <u>Creating a line</u>, <u>Creating a station</u>, and *Interaction Administrator Help*.

Digital certificates

You can authenticate SIP/TLS connections to and from the Customer Interaction Center server and the Unified Messaging server using SIP and TLS line certificates. To support TLS, certificates must be configured on both the Customer Interaction Center server and the Unified Messaging server. The Customer Interaction Center server comes preconfigured with a Default Line Authority Certificate that can be used to sign third-party certificates. If a Unified Messaging server uses an existing certificate that has already been signed, you must import the Certificate Authority (CA) certificate on the Customer Interaction Center server. Use the TLS Security option on the SIP line to import the certificate. For more information, see Creating a line in this document.

The Unified Messaging server certificate is used for outbound connections, or when mutual authentication is required. Install the Default Line Authority Certificate as a trusted CA on the Unified Messaging server for inbound connections, or when mutual authentication is required. The Cipher Suites enabled on the Customer Interaction Center server must include at least one cipher suite supported by the Unified Messaging server.



Advanced setup

It is possible to use various combinations of multiple SIP lines and multiple Unified Messaging stations to either connect to multiple Unified Messaging servers or support both encrypted and unencrypted connections simultaneously.

Exchange Server 2010

A single Unified Messaging IP Gateway can have multiple Unified Messaging Hunt Groups, each with a unique Pilot Identifier. This allows multiple Unified Messaging stations to be created, each with different settings. For more information, see Creating a station.

Enable Exchange Server 2010 MWI integration with Interaction SIP Proxy

Customer Interaction Center, when configured as a Unified Messaging (UM) IP gateway on the Exchange Server, does not natively support delivery of Message Waiting Indicator (MWI) Notify messages to endpoints when a user receives or deletes a message from his or her mailbox. However, you can support MWI messages in this environment if you install Interaction SIP Proxy and do some configuration tasks.

You can configure Interaction SIP Proxy to route MWI Notify messages to SIP endpoints, such as IP telephones, and to route voice mail call setup messages between Exchange Server 2010 and the Customer Interaction Center server.

Configuration limitations

Using Interaction SIP Proxy to route MWI Notify messages from Exchange Server 2010 has the following limitations:

- Interaction SIP Proxy will be the destination for all Unified Messaging communications from the Customer Interaction Center server.
- On each Exchange Server 2010 machine, you must create Unified Message IP gateways for Interaction SIP Proxy and each Customer Interaction Center server, including fallback servers in a switchover configuration.
- The Pilot Identifier/Hunt Group that Customer Interaction Center will use will be associated to the Unified Messaging IP Gateway for the Interaction SIP Proxy system.
- Interaction SIP Proxy will have a From based route configured to send Customer Interaction Center traffic to the Exchange server.
- The Unified Messaging extension for the user will match the Customer Interaction Center user extension.
- Polycom phones need to register to the Customer Interaction Center servers as well as the Interaction SIP Proxy system.
- You must set a default station for each user defined in Customer Interaction Center to which you want to send MWI messages.
- The voice mail button on the telephone will not retrieve the voice mail messages for a user.
- If a user logs on or off a station, the MWI indicator will not change.
- The MWI indicator on the phone is enabled when the e-mail message arrives in the mailbox of the user.

Install and connect Interaction SIP Proxy

- 1. Through Genesys or your Genesys partner, purchase Interaction SIP Proxy.
- 2. Install Interaction SIP Proxy.
 - For information on installation requirements and procedures, see "Interaction SIP Proxy installation or upgrade" in *Interaction SIP Proxy Technical Reference*.
- 3. In the Interaction SIP Proxy web interface, configure Interaction SIP Proxy to connect to the Customer Interaction Center server by selecting **System** > **IC Integration**.
 - For more information, see "Connect Interaction SIP Proxy to the Customer Interaction Center server" in *Interaction SIP Proxy Technical Reference*.
- 4. Using Interaction Administrator, trust the connection from the Interaction SIP Proxy system.

For more information, see "Trust the Interaction SIP Proxy connection and assign a location" in *Interaction SIP Proxy Technical Reference*.

Configure Interaction SIP Proxy

- 1. Open a web browser and navigate to the URL address of the Interaction SIP Proxy address server.
- 2. Enter the user name and password for Interaction SIP Proxy and select the **OK** button.
- 3. In the upper right corner, select the Config icon.
- 4. On the **General** tab, set the following controls as indicated:
 - Digest Authentication No
 - Record Route Yes
 - Rewrite Request URI Yes
 - Registration has Priority Yes
- 5. Select the Server Plan tab.

The Config-Server Plan page is displayed.

6. On the right side of the page, select the **insert** hyperlink.

A set of controls is displayed.

- 7. In the box at the top of the set, enter a name for this server plan. Use a name, such as "Exchange UM MWI" or something similar, so that you can identify this entry easily in the future.
- 8. In the **Destinations** box, enter the address of the Exchange Server 2010 system.

You can specify an IP address, host name, or fully-qualified domain name.

9. Change other settings, such as Protocol and Timeout, as necessary.

For more information on these controls, see *Interaction SIP Proxy Help* by selecting the **Help** icon in the upper right corner of the page.

10. Select the Apply button.

The entry is saved and displayed.

11. Select the Routing tab.

The **Config-Routing** page is displayed.

12. On the right side of the page, select the **insert** hyperlink.

A set of controls is displayed.

13. In the box to the right of the check box, enter a name for this route.

Note:

Include "IC UM MWI" or something similar in this name to ensure you can identify it easily in the future.

14. In the From Address box, enter the following text:

(.*)@server_address

server_address is the address of your Customer Interaction Center server. You can specify an IP address, host name, or fully-qualified domain name.

15. In the **To Address** box, enter the following text:

*

- 16. In the Routes to box, enter \$1.
- 17. In the list box to the right of the **Routes to** box, select the server plan that you created earlier in this procedure.
- 18. In the **Description** box, you can, optionally, enter text to further identify this route.
- 19. Select the Apply button.

The route entry is saved and displayed.

20. Ensure that the check box for the route you created is enabled.

Note:

If you use a switchover pair of Customer Interaction Center servers, you must repeat steps 11 through 20 for the second server.

21. Select the Authentication tab.

The Config-Authentication page is displayed.

22. On the right side of the page, select the **insert** hyperlink.

The following set of controls is displayed.

23. In the **Registration Id** box, enter a unique, identifiable string for a managed IP telephone that you want to receive MWI messages.

For more information on defining and configuring managed IP telephones in Interaction Administrator, see "Home > Interaction Administrator > IC Server > Managed IP Phones" in *Interaction Administrator Help*.

24. In the **Username** box, enter the user name for the specified station.

Note:

You set the user name and password for a station through the Stations container in Interaction Administrator.

- 25. In the Password box, enter the password for the specified station.
- 26. In the Aliases box, enter the extension that is assigned to the user of this station.

Note:

You set the extension number for a user through the **Users** container in Interaction Administrator.

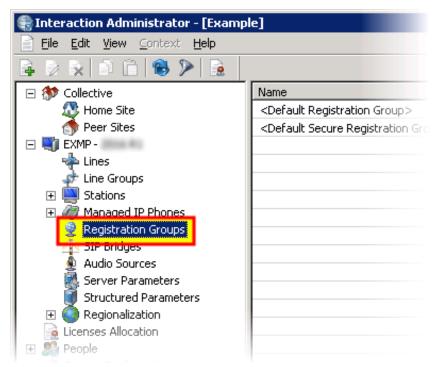
27. On the right side of the page, select the Apply button.

The authentication entry is saved and displayed.

Configure registration group in Interaction Administrator

To receive MWI messages, each managed IP telephone must use a Customer Interaction Center registration group with the appropriate configuration. To create the registration group, do the following steps:

- 1. Log on to Interaction Administrator.
- 2. In the left pane, expand the container for your Customer Interaction Center server.



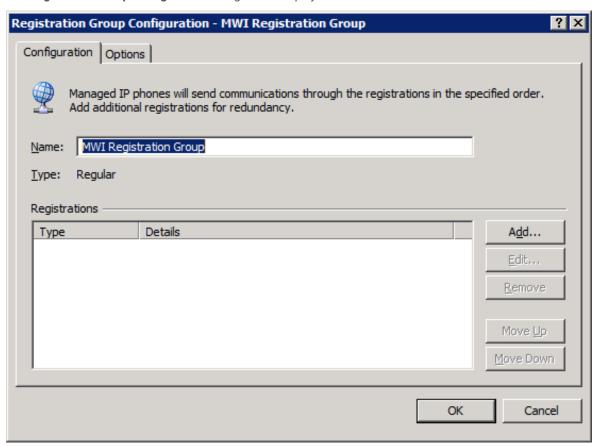
- 3. Select the Registration Groups container.
- 4. In the right pane, right-click an open area and select **New** from the resulting shortcut menu. The **New Registration Group** dialog box is displayed.



- 5. In the Name box, enter a unique, identifiable name for this IP telephone registration group.
- 6. In the **Type** list box, select the **Regular** entry.

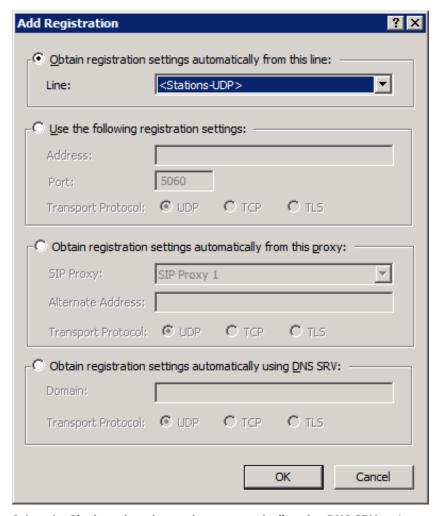
7. Select the **OK** button.

The Registration Group Configuration dialog box is displayed.



8. Select the **Add** button.

The Add Registration dialog box is displayed.



- 9. Select the Obtain registration settings automatically using DNS SRV option.
- 10. In the Domain box, enter domain in which the Customer Interaction Center server resides.

For example, if the fully qualified domain name of the Customer Interaction Center server is CICserver1.mycompany.com, enter mycompany.com in the **Domain** box.

- 11. In the **Transport Protocol** area, select the **TCP** option.
- 12. Select the OK button.

The DNS SRV entry is saved and displayed in the Registration Group Configuration dialog box.

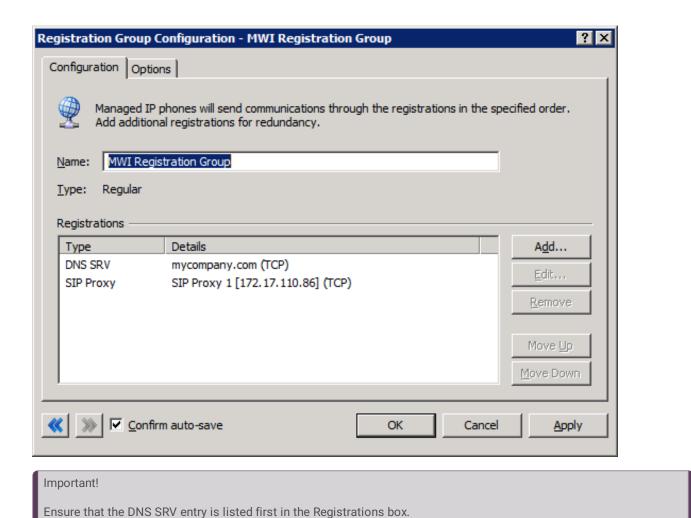
- 13. In the **Registration Group Configuration** dialog box, select the **Add** button.
 - The Add Registration dialog box is displayed.
- 14. Select the Obtain registration settings automatically from this proxy option.
- 15. In the SIP Proxy list box, select the Interaction SIP Proxy server that you installed and configured previously in this procedure.
- 16. In the **Alternate Address** box, enter an address that the managed IP telephone can use to send SIP messages to the Interaction SIP Proxy server.

Important!

Specify the information in the **Alternate Address** box only if the IP telephones exist in locations other than the one that contains this Interaction SIP Proxy server.

- 17. In the **Transport Protocol** area, select the **TCP**option.
- 18. Select the OK button.

The Interaction SIP Proxy entry is saved and displayed in the Registration Group Configuration dialog box.



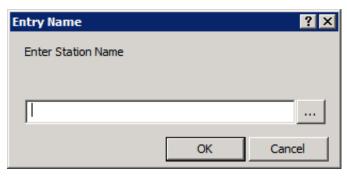
Create a Unified Messaging station for the Exchange Server Pilot in Interaction Administrator

Important!

This procedure requires that you have created a Pilot Identifier number on the Exchange Server 2010 UM.

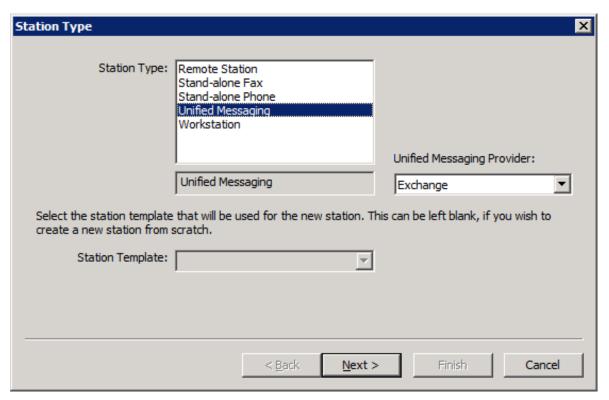
- 1. Log on to Interaction Administrator.
- 2. In the left pane, expand the configuration for your Customer Interaction Center server.
- 3. Select the **Stations** container.
- 4. In the right pane, right-click an open area and select **New** from the resulting shortcut menu.

The Entry Name dialog box is displayed.



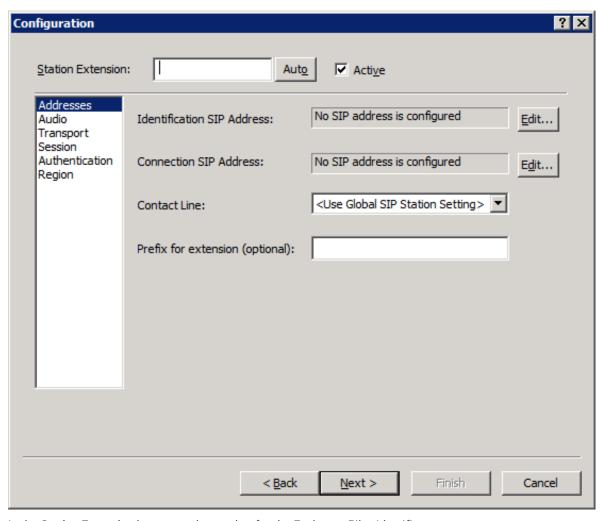
- 5. In the Enter Station Name box, enter EXCHANGE.
- 6. Select the OK button.

The Station Type dialog box is displayed.

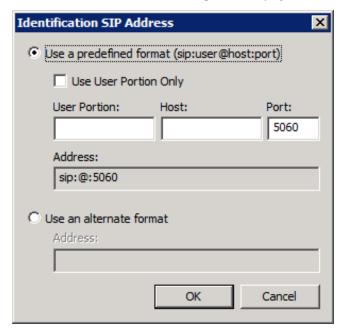


- 7. In the **Station Type** box, select **Unified Messaging**.
- 8. In the **Unified Messaging Provider** list box, select **Exchange**.
- 9. Select the Next button.

The **Configuration** dialog box is displayed.



- 10. In the **Station Extension** box, enter the number for the Exchange Pilot Identifier.
- 11. Select the **Edit** button to the right of the **Identification SIP Address** box. The **Identification SIP Address** dialog box is displayed.

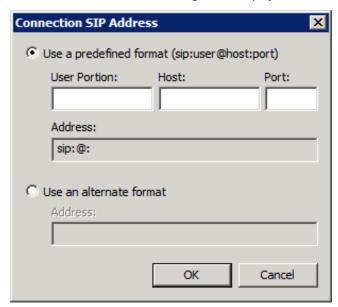


- 12. In the User Portion box, enter the number of the Exchange Pilot Identifier.
- 13. In the Host box, enter the address of the Interaction SIP Proxy server that you configured earlier in this procedure.
- 14. Select the **OK** button.

The address is displayed in the **Configuration** dialog box.

15. In the Configuration dialog box, select the Edit button to the right of the Connection SIP Address box.

The Connection SIP Address dialog box is displayed.



- 16. In the User Portion box, enter the number of the Exchange Pilot Identifier.
- 17. In the Host box, enter the address of the Interaction SIP Proxy server that you configured earlier in this procedure.
- 18. In the Port box, enter 5060.
- 19. Select the **OK** button.

The address is displayed in the Configuration dialog box.

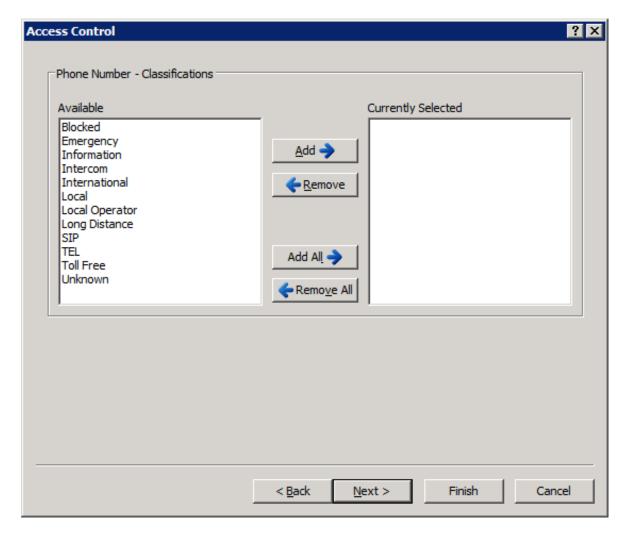
20. In the **Contact Line** list box of the **Configuration** dialog box, select the Customer Interaction Center SIP line that you want to use for this station.

Important!

The SIP line that you select for Contact Line must be configured to use the TCP protocol and port 5060.

21. In the Configuration dialog box, select the Next button.

The Access Control dialog box is displayed.



- 22. In the Available box, select SIP and then select the Add button.
- 23. Select the Finish button.

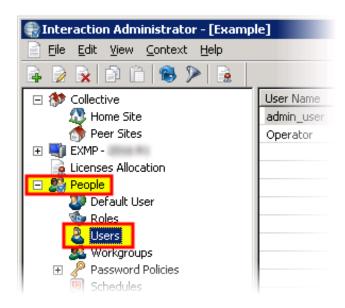
The station for Exchange Unified Messaging is saved and displayed in Interaction Administrator.

Configure users in Interaction Administrator

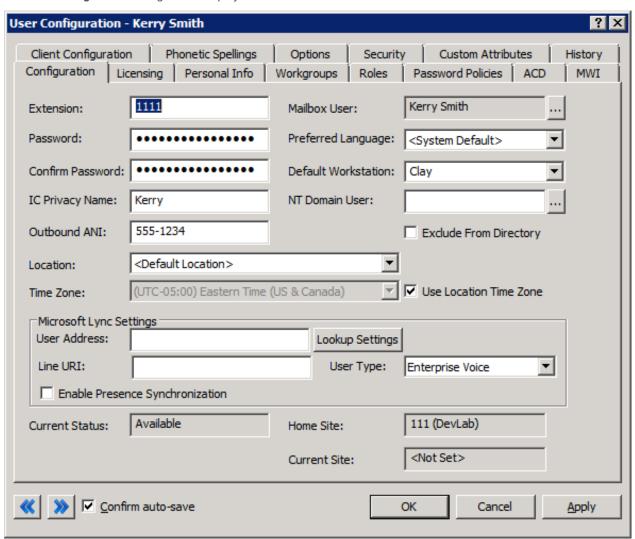
Note:

You must do this procedure for each user who you want to receive MWI messages from Exchange Server 2010 UM.

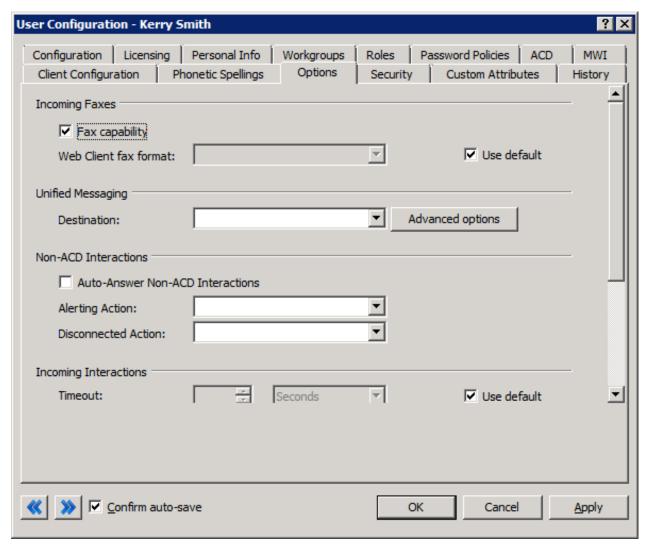
- 1. Log on to Interaction Administrator.
- 2. In the left pane, expand the container for your Customer Interaction Center server.
- 3. Select the Users container.



4. Double-click a user entry that you want to configure to receive MWI messages from Exchange Server 2010 UM. The **User Configuration** dialog box is displayed.



- 5. In the Extension box, enter the UM Extension configured in Exchange Server 2010 UM.
- 6. In the **Default Workstation** list box, select the station that will receive MWI messages for this user.
- Select the **Options** tab.
 The **Options** tab is displayed.



- 8. In the **Destination** list box in the **Unified Messaging** area, select the **EXCHANGE** registration group that you created previously in this procedure.
- 9. Select the **OK** button.

The changes to this user entry are saved.

Configure Exchange Server 2010 UM IP gateways and UM hunt group

- 1. Open the Exchange Management Console window.
- 2. In the left pane, expand the **Organization Configuration** container.
- 3. In the left pane, select the Unified Messaging item.

The **Unified Messaging** pane is displayed on the right side.

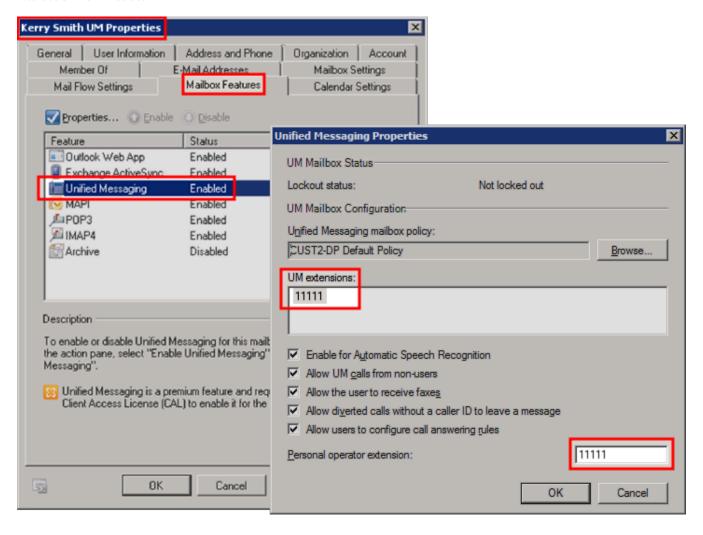
- 4. Select the UM IP Gateways tab.
- 5. Using the **Add Expression** button, add the following servers:
- Primary Customer Interaction Center server
- Secondary Customer Interaction Center server, if using a switchover pair
- The Interaction SIP Proxy server that you configured earlier in this procedure

Important!

Ensure that you set the **Pilot Identifier** for the default UM hunt group of the Interaction SIP Proxy server UM IP Gateway to the value you specified in the <u>Create a Unified Messaging station for the Exchange Server Pilot in Interaction Administrator</u>.

Configure user mailboxes in Exchange Server 2010 UM

In Microsoft Exchange Server 2010 UM, configure each user mailbox to have the UM extension that you specified for that user in Interaction Administrator.



Change Log

The following changes have been made to this document since release:

Date	Changes
01-October-2011	Initial Release
23-July-2013	 Updated formatting Added content for supporting MWI messages from Exchange Server 2010 UM with Interaction SIP Proxy
05-September-2014	Updated documentation to reflect changes required in the transition from version 4.0 SU# to CIC 2015 R1, such as updates to product version numbers, system requirements, installation procedures, references to Interactive Intelligence Product Information site URLs, and copyright and trademark information.
13-October-2015	 Updated cover page to reflect corporate branding Updated "Copyright and trademark information" page Minor edits
08-August-2017	 Removed Exchange Server 2010 TLS cipher suites section from Digital certificates topic. Updated copyright and trademark page.
10-May-2018	Rebranded from Interactive Intelligence to Genesys