IP Office
SoftConsole Installation

Contents

1. Installation

2. Administration

Chapter 1.
Installation

1. Installation

This guide covers the installation, configuration and general administration of IP Office SoftConsole. SoftConsole is intended primarily for operators and receptionists. It is designed to work in parallel with a physical telephone. The telephone provides the operators speech path and SoftConsole provides call controls.

The key features are:

- Large display for incoming call information.

- Searchable directory of all IP Office groups and users including status information.

- Visual display of queued calls.

- Visual display of the status of extensions.

- Up to 16 call parking areas.

- Mobile Twinning.

SoftConsole cannot be used in full softphone mode. For example, it does not support the PC also being used as a softphone.

1.1 Pre-Installation Requirements

Check the following requirements before attempting to install SoftConsole.

Materials Required

- SoftConsole Software.
  The SoftConsole software is provided either on:
    - ❑ The IP Office User Application CD.
    - ❑ The IP Office Applications DVD.
    - ❑ Alternately the software can be downloaded from http://support.avaya.com.
- AvayaFW.bat
  This file is a batch file that adds various IP Office applications and the ports that they frequently use as exceptions to the Windows in-built firewall settings. This file can be downloaded from http://marketingtools. avaya.com/tools/firewall.
- Licenses
  SoftConsole requires a license entered into the IP Office system configuration for each simultaneous running copy of SoftConsole. The licenses must match the serial number of the Feature Key dongle present in the IP Office system.
    - ❑ SoftConsole (users) - Licenses for up to a maximum of 4 SoftConsoles can be added.

Information Required

- Details of the user name and extension number.
- The PC location and account name and password necessary for PC Administrator rights during installation.
- Service user name and password for IP Office system configuration access.

User PC Requirements
There are the minimum recommended PC specifications for SoftConsole.

RAM	HD	Pentium	Celeron	AMD	XP Pro	2000 Pro	2000 Server	2003 Server
128MD	1GB	800MHz	Celeron 3 800MHz	Athlon B 650MHz	✔	✘	✘	✘

Telephone Requirements
IP Office SoftConsole is used in conjunction with a physical IP Office extension phone which provides the operators speech path for calls. It is not supported with PC softphones.

Language Support
Phone Manager supports the following languages. The language used can be selected by the user when running Phone Manager.

- Brazilian, Chinese (Simplified), Danish, Dutch, English, Finnish, French, German, Italian, Korean, Latin Spanish, Norwegian, Portuguese, Russian, Spanish and Swedish.

Additional Requirements
Sound and media files can be associated with calls. If this feature is to be used then the PC requires a sound card and speakers to be installed.
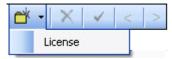
1.2 Entering License Keys

This section assumes that the IP Office feature Key dongle has already been installed and setup plus the IP Office Feature Key server software if required. If this is not the case, refer to the IP Office Installation manual.

To enter license keys in IP Office Manager:

1. Make sure that you have the list of licenses ready and that they match the serial number of the dongle being used by the IP Office.

    *   Preferably the licenses should be in an electronic document from which they can be cut and pasted into the configuration. This reduces the chances of errors in the license entry.

2. Open IP Office Manager. Click ![icon] and receive the configuration from the IP Office system.

3. Click ![icon] License. Any existing licenses are listed.

4. Click Create a New Record in the Group Pane. Select License.

5. Enter the license key in the license key field. If the licenses are in an electronic format copy the license and paste in the license key field.

6. Click OK. The Status of the newly entered license is Unknown.

7. Repeat the above steps for any additional licenses.

8. Click ![icon] and send the configuration back to the IP Office. If the only changes made were to add license keys, this can be done using merge.

9. Click ![icon] and receive the configuration from the IP Office system again.

10. Click ![icon] License.

11. Verify that the Status of the license entered has changed to Valid. If a license is listed as Invalid, ensure that it was entered correctly.

1.3 IP Office Configuration

There are a number of recommended configuration changes for users who want to be SoftConsole operators.

- If there is more than one operator it is recommended that they are placed into a hunt group. Call routing and distribution is then available between the SoftConsole operators. The IP Office can support up to 4 simultaneous SoftConsole operators.

- If the SoftConsole users are members of a group, voicemail for that group should be switched off unless specifically required.

- Unanswered calls should be returned to the SoftConsole operator. If no transfer time is set, calls are not returned to the operator.

- Turn Busy on Hold off. When a SoftConsole operator places a call on hold, incoming calls do not get the busy tone.

- Allow the SoftConsole operator to send a short text message to a user with an Avaya display telephone. For IP Office 4.0+ this option is no longer required in order to use the Send Message function.

To make changes in IP Office Manager

1. Open IP Office Manager.

2. Click and receive the IP Office system configuration.

3. Make the configuration changes to the hunt group and user.

If there is more than one operator, it is recommended that they are placed in a hunt group to which incoming calls are presented. Those calls will then be visible and can be answered by any SoftConsole operator who is active.

To add an extension number to a hunt group

1. Click and open the hunt group for SoftConsole operators.

2. In the Details pane under the extension list area, click Add.

3. Select the operator's extension number and include it in the selected extensions listing.

4. Click OK.

5. Make sure that the checkbox by the new extension is selected.

6. Click OK.

To amend the SoftConsole user

1. Click ![icon] and click the user's extension number in the Navigation Pane. The options are displayed in the Group Pane area.

2. Select the Voicemail tab.

    *   If voicemail is switched on you need to provide the users with message waiting indication for new hunt group voicemail messages.
        Click the Source Numbers tab. Add an Hname entry (replacing name with the group name) for the hunt group.

3. Select the Telephony tab.

    *   Transfer Return Time (secs)
        By default, when the SoftConsole operator does an unsupervised transfer, the call rings the transfer number until answered or the caller hangs up. The call does not return to the SoftConsole operator. When a transfer return time is set, unanswered calls are returned to the operator and (NoAns) is displayed in the Call Information window.

    *   Busy on Held
        We recommend that this is turned Off so that when the SoftConsole operator places a call on hold, additional incoming calls do not get busy tone.

    *   System Phone
        Select this option to let the user use the SoftConsole's Send Message function. For IP Office 4.0+ this option is no longer required in order to use the Send Message function.
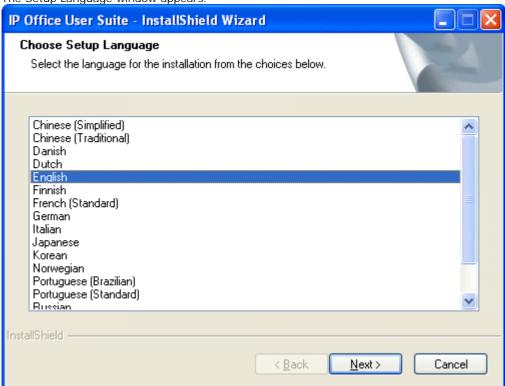
1.4 Installing the SoftConsole Software

This process assumes that the PC is connected to the LAN and can communicate with the IP Office.
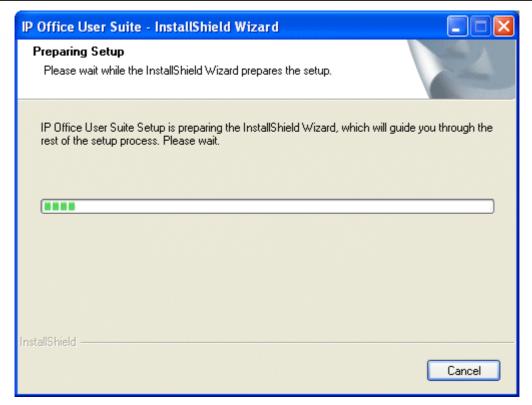
To install SoftConsole software:

1. Ensure that you have:
   - IP Office user name and password.
   - SoftConsole software or path to Phone Manager software on the network.
   - AvayaFW.bat file or path to that file on the network.

2. Log on using an account with administrator rights for the PC, that is sufficient rights to install applications.

3. Check whether SoftConsole is already installed or not. If already installed:

4. If the version is pre-SoftConsole version 3.2, it must be removed before proceeding any further. See Removing Old SoftConsole Software 16ᐩ.

5. If the version is SoftConsole 3.2 or higher, it can be upgraded. See Upgrade Procedure 16ᐩ.

6. Inserts the media containing the SoftConsole software or browse to the network location where the software has been placed.

7. If installing from the IP Office User Applications CD, the CD should auto-start. If not open the CD and double click on setup.exe.
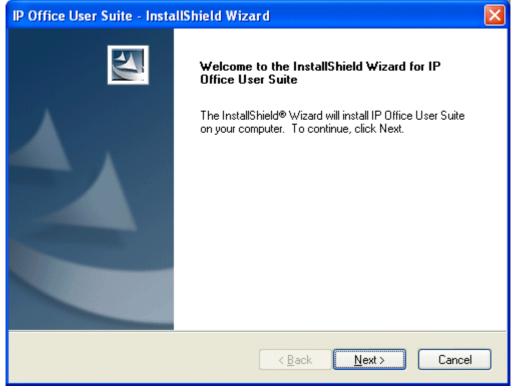
8. The Setup Language window appears.
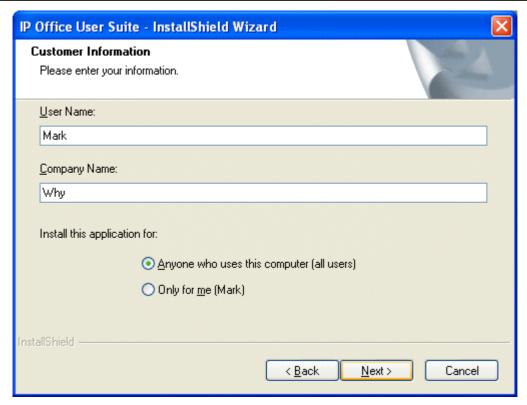
9. Select the language for the installation and click Next. The Preparing Setup screen appears for a moment.

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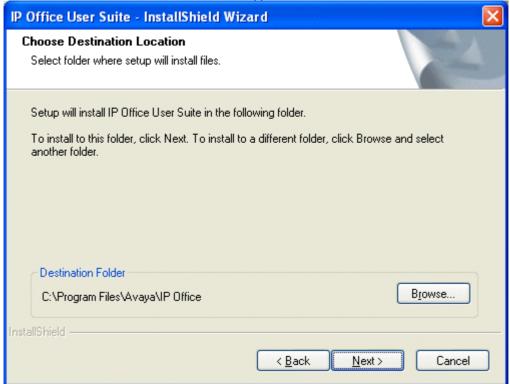
10. The Welcome to the InstallShield Wizard for IP Office User Suite window appears.
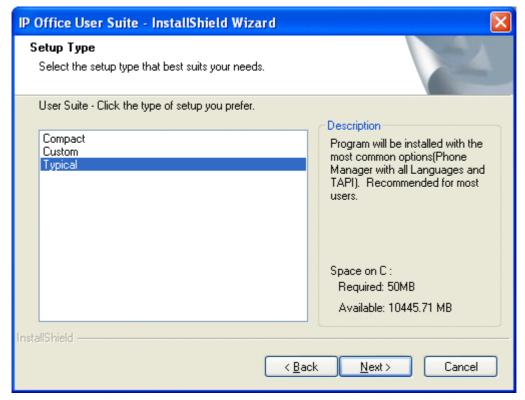
11. Click Next.

12. The Customer Information window appears.

13. Type the user and customer name.

14. Select Anyone who uses the computer and click Next.

15. The Choose Destination Location window appears.

16. Leave the directory setting at default unless absolutely necessary. Click Next.

17. The Setup Type window opens.

18. Select Custom.

19. The Select Features window appears.

20. De-select the Phone Manager option and select the SoftConsole option. Click Next.

21. The Start Copying Files window appears. Settings can be changed at this stage.

22. To review or change any settings, click Back.

23. To begin copying the files, click Next.

24. The Setup Status window appears. The SoftConsole files may take a few minutes to install.

25. The InstallShield Wizard Complete window opens. Click Finish.

1.5 Removing Old SoftConsole Software

If there is a version of SoftConsole below 3.2 already installed, the application must be removed. The new version of software can then be installed. If the SoftConsole version is 3.2 or higher you can upgrade the software. For more information, see Upgrade Procedure 16 .

⚠ WARNING
This process will remove all installed components of the IP Office User suite. If any of the following IP Office applications are installed, ensure that they are reinstalled from the new IP Office User suite:

- TAPI
- DevLink
- MS-CRM
- Phone Manager

To remove existing SoftConsole software:

1. Select Start | Settings | Control Panel.
2. Select Add/Remove Programs.
3. From the list of Currently installed programs, select IP Office User Suite.
4. Click Change/Remove. The InstallShield Wizard for the software suite is started.
5. When the option screen opens, select Remove.
6. You are asked 'Do you want to completely remove the selected application and all of its features?'. Click Yes.
7. Once the suite has been removed, click Finish and close Add/Remove Programs.
8. You can now install the new version of SoftConsole. For more information, see Installing SoftConsole 12 .

1.6 Upgrade Procedure

If the application software is 3.2 or higher you can upgrade the software, without having to removing the existing version.

To upgrade your applications:

1. Insert the IP Office User Suite CD. The CD will auto-start the InstallShield Wizard. The 'Welcome to the InstallShield Wizard for IP Office User Suite' window opens.
2. Click Next. The 'Upgrade Features' window opens. A list of features that can be upgraded is listed.
3. Select the options you want to upgrade and de-select the options you do not want to upgrade.
4. To upgrade, click Next. The 'Setup Status' window opens. The selected features are upgraded. It may take several minutes.
5. The 'Update Complete' window opens. To exit the InstallShield Wizard, click Finish.

Chapter 2.
Administration

2. Administration

2.1 Exporting Directories

Directory entries can be exported in a .csv file format. User, hunt group and directory entries can all be exported as well as the directory entries from the IP Office switch and entries in the Microsoft Outlook Contacts folder.

To export a directory:

1. Select the directory to export. The directories shown in the Directories panel will be exported. To select the entries to be exported, use the Show/Hide buttons. SoftConsole Local Directory entries including any entries from the IP Office switch and entries in the Microsoft Outlook Contacts folder.

2. From the Directory menu, select Export.

   - The exported directory will be, by default, created in the Data directory of the program. If an existing file name is selected the original file contents are overwritten. This folder location contains the LocalDir.csv files that SoftConsole uses. DO NOT overwrite with an export function.

3. Enter a name for the file and click OK.

2.2 Deleting a Profile

Profiles can be removed if they are no longer required.

To delete a profile:

1. Click File > Save Profile As.

2. Select the profile to be deleted.

3. On your keyboard, press Delete.

4. The message *'Are you sure that you want to send 'profile name.pfs' to the Recycle Bin?'* is shown. Click Yes.

5. To return to the SoftConsole main window, click Save.

2.3 Directory Paths

SoftConsole is installed by default under the directory path C:\Program Files\Avaya\IP Office\SoftConsole. Sub-directories are created enabling the user to save specific information when required.

- Data
  The directory contains data files for the local directory. This is the default directory when browsing for a data file, or when exporting a directory to file.

- Langs
  The directory contains language specific files, including Help and Tutorials.

- Profiles
  The directory contains the user profiles (*.pfs) that are available to the SoftConsole application. Initially this directory contains only the default templates. When using the 'Save As' command, profiles or templates are saved in this directory. Only profiles and templates saved in this directory are available from the SoftConsole login window.

- Script
  The directory contains the script file (*.txt or *.rtf) to open on DDI/DID matching. This is the default directory to open when browsing for a script. New script files should be copied into this directory.

- Skin
  The directory is the default location for any custom skins that have been created. For more information, see Creating Custom Skins in the appendix.

2.4 Outlook Warning

If directory access to Microsoft Outlook Contacts folder has been selected in the directories configuration form, a Microsoft Outlook warning screen might appear when an operator is opening SoftConsole or using the option 'Send Email'. For more information, refer to the Microsoft Support web site.

1. Select the Allow access for check box, and then click an amount of time in the list.

2. Click Yes to allow SoftConsole to retrieve Outlook contacts.

2.5 Loading a Skin

When a custom skin has been created it can be loaded into the SoftConsole application. For more information, see the Creating Custom Skins section of the IP Office Phone Manager Installation documentation.

To load a new skin in SoftConsole:

1. Click Tools > Preferences - Configure > Appearance.

2. Check Apply Custom Skin.

3. Enter the file path of the skin file or click Browse, select the skin.ini file that represents your chosen skin, then click Open.

4. Click OK.

2.6 Command Line Options

The following command line option can be used with SoftConsole:

oncall

This will show the Caller ID (if available) of the calling/called party a user is talking to when that user is busy. Use and support of this feature may be subject to local restrictions in some countries.

Information shown without the -oncall option.   Information shown with the -oncall option.

Applying Command Line Options

The following methods apply to programs started via the Windows Start menu. For programs started from a desktop icon, the Target path can be edited by right-clicking on the desktop icon and selecting Properties.

Windows XP

1. Right-click on the Windows taskbar and select Properties. The Taskbar and Start Menu Properties window opens.

2. Select Start Menu and click Customize. From the Customize Start Menu, click Advanced to open an Explorer window.

3. Locate the shortcuts for the IP Office programs. These are normally in *C:\Document Settings\All Users\Start Menu\Programs\IP Office*.

4. Right-click on the shortcut icon for SoftConsole and select Properties. View the Shortcut tab.

5. Edit the Target path to include the command line option.

    *   The example below shows a Target path for SoftConsole set to *oncall*. Enter the quote marks as shown though they may be automatically removed if they are not required by the system.
        C:\Program Files\Avaya\IP Office\SoftConsole\"SoftConsole.exe" "-oncall"

6. Click OK.

7. Close the Explorer window.

8. In the Customize Start Menu window, click OK.

9. In the Taskbar Properties window, click OK.

2.7 Using the Debug Tool

SoftConsole has an integrated debug tool that can be used to assist in diagnosing problems with the program. Traces can be produced for each installation of SoftConsole. Details are logged in the file called *SoftConsole.log* in the SoftConsole directory (by default c:\Program Files\Avaya\IP Office\SoftConsole).

To start the debug tool:

1. Click Start > Programs > IP Office.

2. Highlight SoftConsole, then right mouse click and select Properties from the menu.

3. On the Short Cut tab there is a field titled Target.

4. Place the cursor at the end of the row after the quote, press the spacebar once and type -debug.

5. Click OK.

6. Restart SoftConsole.

Note

1. The log file is over written each time SoftConsole is opened. If the log results need to be kept copy the log file to another directory before restarting SoftConsole.

2.8 Conference Resources

A conference can be created using Conferencing Center, Phone Manager or SoftConsole. Each time a conference is created resources are used. All the applications share the same conference resources.

System features such as call intrusion, call recording and silent monitoring all use conference resources. This includes automatic recording, if enabled. When any of these features are active, the number of slots available for conference parties is reduced.

The number of internal users and external callers that can be involved in conferences at the same time is limited by the conference capacity of your IP Office telephone system.

IP Office	Maximum Callers in Any One Conference	Maximum Total Number of People on Conference Calls	Maximum Number of Conferences on the System
Small Office Edition	6	24	8
IP403	64	64	21
IP406	64	64	21
IP412	64	128	42

Note

- If IP Office Conferencing Center is installed, 5 resources are reserved for use by the system, for example; call recording. The maximum number of callers in any one conference and the total number of people on conference calls is reduced by 5. The maximum number of conferences on the system for IP403, IP406 and IP412 is reduced by 2.

Examples

1. IP403 and IP406 support multiple conferences adding up to 64 callers in conferences.

   - 21 x 3 way conferences.

   - 1 x 10 way conference plus 11 x 3 way conferences. Free capacity for 20 more conference callers to join new or existing conferences.

2. IP412 supports multiple conferences totaling up to 128 callers in conference with no more than 64 callers in any one conference.

3. The IP412 supports two 63 party conference banks. When a new conference is started, the bank with the most free capacity is used for that conference. However, once a conference is started on one conference bank, that conference cannot use any free capacity from the other conference bank.

2.9 BLF Operation

This section describes the BLF operation on the IP Office Phone Manager and SoftConsole applications.

There are several, separate mechanisms for delivering user state information updates. There is one mechanism for the IP Office-to-IP Office information flow and three mechanisms for the IP Office-to-User information flow.

While each of these mechanisms share information with each other, they are completely separate and have no direct impact on each other.

- IP Office systems configured with SCN (Small Community Networking) enabled, exchange user state information using SCN messaging.
- IP Office hard-phones exchange user state information with the IP Office they are registered to, using the phone signalling messages embedded in the H.225 stream.
- The Phone Manager and SoftConsole applications receive user state information from the IP Office they are logged on to, using messages sent out over the network. The type of message sent will depend on whether the application resides within the same (local) subnet as the IP Office it is logged on to, or whether it resides in a different (remote) subnet (as in the case with remote users).

Local Network Functionality

Phone Manager and SoftConsole BLF update notifications are broadcast on to the same subnet as that of the IP Office. In the case of IP Office Control Units that have two local subnets (such as the IP Office 412 and the IP Office Small Office Edition), the messages are broadcast to both subnets.
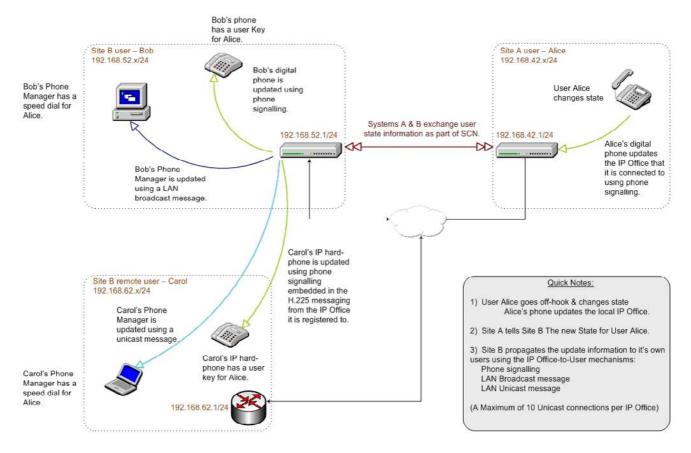
The only limitations of broadcast message BLF updates is the size of subnet:

A 24 bit Class C subnet allows up to 254 host IP addresses. 1 of those will be the IP Office, so there is the potential to have up to 253 other PCs on that network. Each PC can run Phone Manager that will receive BLF updates.

Remote Network Functionality

When a Phone Manager application is logged on to an IP Office system (but does not reside in the same local subnet as the IP Office), IP Office will send BLF update notification messages directly to the PC that the Phone Manager is running on. This is a Unicast message. Each IP Office only supports BLF update notifications for 10 remote Phone Manager applications, provided on a first come, first served basis. Upon system start-up, the first 10 Phone Manager connections from a different subnet will all receive BLF update notifications. Subsequent connections will not be provided with BLF update notifications but all other features will operate as per normal.

An example of user state information updates is shown below:

Index