IP Office

SoftConsole Installation Manual

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Chapter 1.
Installation

1. Installation

This guide covers the installation, configuration and general administration of 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 system users and hunt groups 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 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/knowledgebase/tools/firewall.

- **Licenses**
  SoftConsole requires you to enter separate licenses 11ᵗ into the telephone system configuration for each simultaneous running copy of SoftConsole. The license is only consumed when the SoftConsole application is running. The licenses must match the serial number of the Feature Key dongle present in the telephone system or the System Identification number of the telephone system.

  - **Receptionist** - Licenses for up to four (4) simultaneous SoftConsole users can be be added in the standard release, while the **Server Edition** license allows up to ten (10) simultaneous SoftConsole users.

  Note: Due to license usage and validation rules, the SoftConsole application will not run when the SoftConsole user hotdesks onto another system. The SoftConsole license is only consumed when the SoftConsole application is running.

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

The following tables identify the minimum recommended PC specifications for SoftConsole:

Operating System Support	
Server OS:	
2003 Server	✘
2008 Server	✘
Client OS:	
XP Professional	✔
Vista	✔
Windows 7	✔

Minimum PC Requirements	
RAM	128MB
Hard Disk Free Space	1GB
Processor:	
- Pentium	PIII 800MHz
- Celeron	Celeron 3 800Mhz
- AMD	Athlon B 650MHz

Telephone Requirements

SoftConsole is used in conjunction with a physical telephone extension which provides the operators speech path for calls. It is not supported with PC softphones.

Supported Languages

SoftConsole supports the following languages. The language used can be selected by the user when running SoftConsole.

- 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

SoftConsole requires entry of at least 1 **Receptionist** license, while a maximum of four (4) simultaneous **Receptionist** licenses are supported in the standard release. **Server Edition** licenses, on the other hand, offer support for up to ten (10) simultaneous **Receptionist** licenses. Ideally, in either case, the licenses are stored 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.

The following license is used to enable support for the SoftConsole application and can only be used by users set to **Receptionist** in the configuration:

- **Receptionist:** *IPO LIC RECEPTIONIST RFA - 171987*
    - For IP Office 6.0 and 6.1, an instance of this license is consumed by each user configured as a **Receptionist**. If the user hot desks to another system in an SCN, their license entitlement is retained, ie. the remote system does not require a **Receptionist** license.
    - For IP Office 7.0 and above, instances of this license are only consumed when the user is using the SoftConsole application. If the user hot desks to another system in an SCN, that system requires an available license in its configuration.

Entering a License Key

1. Open IP Office Manager. Click and receive the configuration from the telephone system.
2. Click **License**. Any existing licenses are listed.
3. Click **Create a New Record** in the Group Pane. Select **License**.
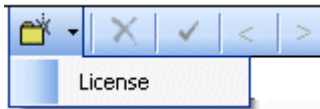
4. Enter the license key in the license key field. If the licenses are in an electronic format copy the license and paste in the license key field.
5. Click **OK**. The **Status** of the newly entered license will be ***Unknown***.
6. Repeat the above steps for any additional licenses.
7. Click and send the configuration back to the telephone system. If the only changes made were to add license keys, this can be done using merge.
8. Click and receive the configuration from the telephone system again.
9. Click **License**.
10. Verify that the **Status** of the license entered has changed to ***Valid***. If a license is listed as ***Invalid***, check that it was entered correctly.

1.3 System 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 collective hunt group. Call directed to the hunt group are then distributed between the available SoftConsole operators. The system 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.

To make changes using IP Office Manager

1. Open IP Office Manager.

2. Click 🔧 and receive the telephone 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 collective 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 👤 and click the user's extension number in the navigation pane. The options are displayed in the group pane area.

2. On the **User** tab select **Receptionist**. The availability of this option is controlled by **Receptionist** licenses 11ᐟ entered into the configuration.

3. 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.

4. 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.

1.4 Installing the SoftConsole Software

This process assumes that the PC is connected to the LAN and can communicate with the IP Office system.

To install SoftConsole software:

1. Ensure that you have:
   - Receptionist user name and password.
   - SoftConsole software.
   - 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 16.

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

6. Inserts the media containing the SoftConsole software or browse to the network location where the software has been placed.
   If installing from the User Applications CD, the CD should auto-start. If not open the CD and double click on setup.exe.
   The **Setup Language** window appears.
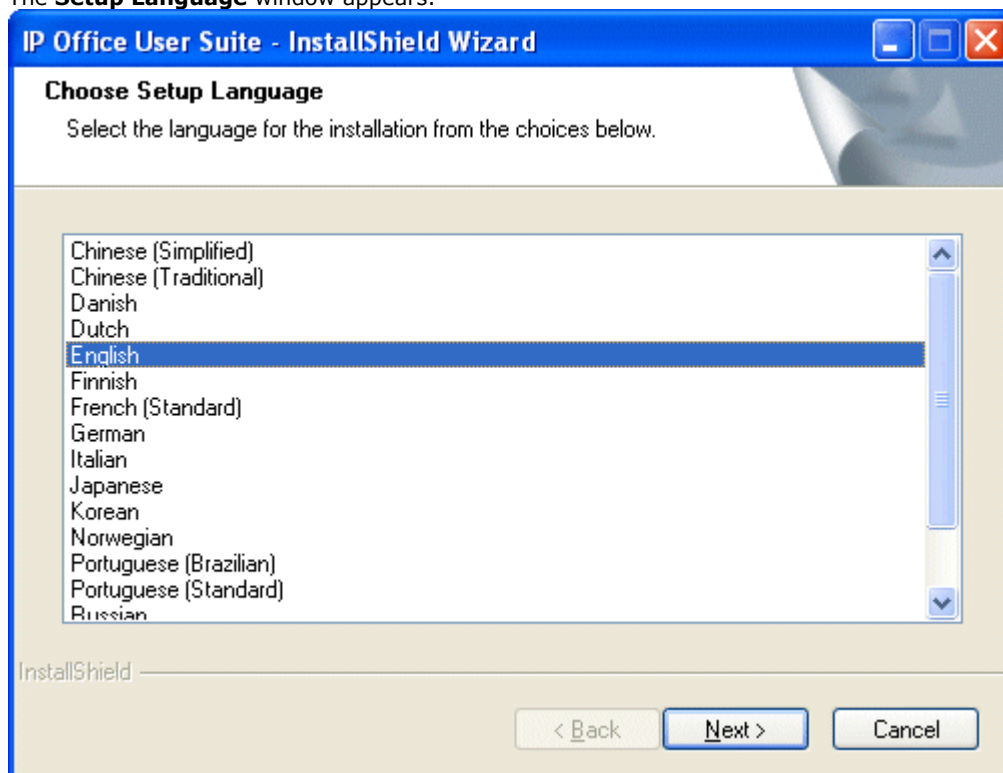
7. Select the language for the installation and click **Next**. The **Preparing Setup** screen appears for a moment.
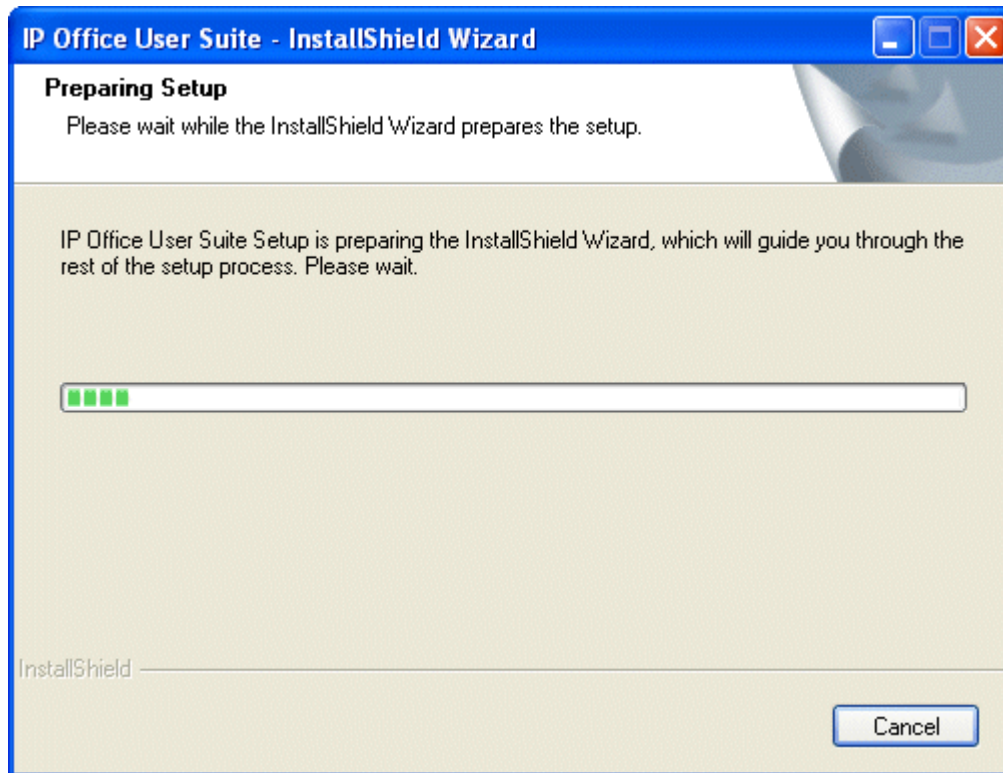
8. The welcome window appears. Click **Next**. The **Customer Information** window appears.
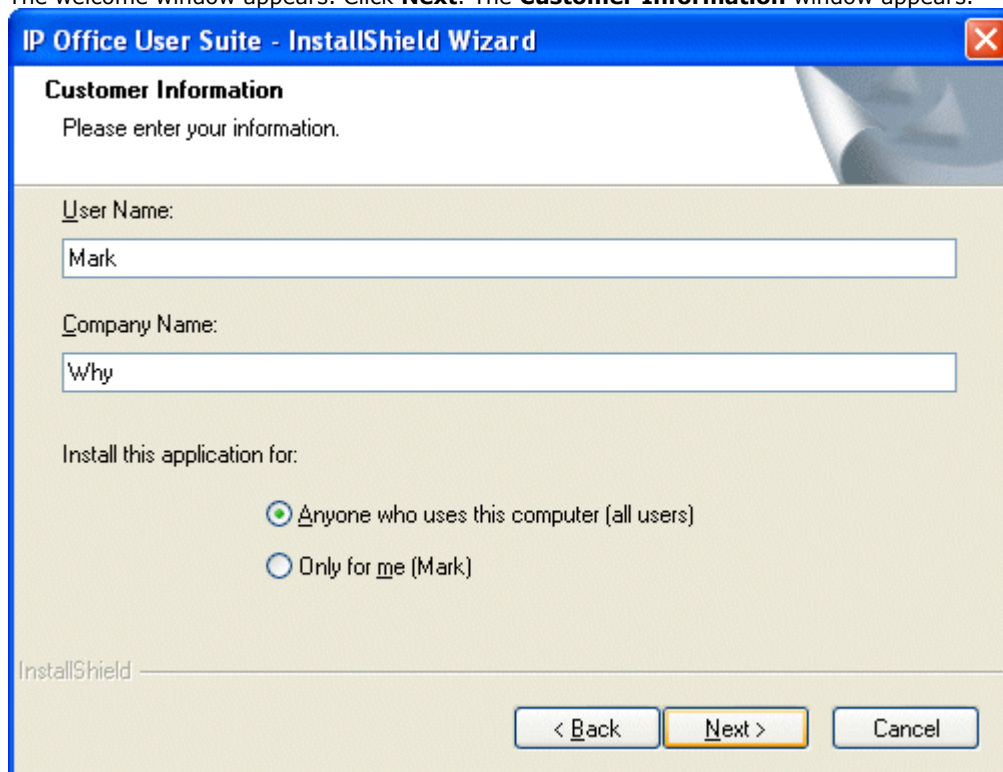
9. Type the user and customer name.

10. Select **Anyone who uses the computer** and click **Next**. The **Choose Destination Location** window appears.
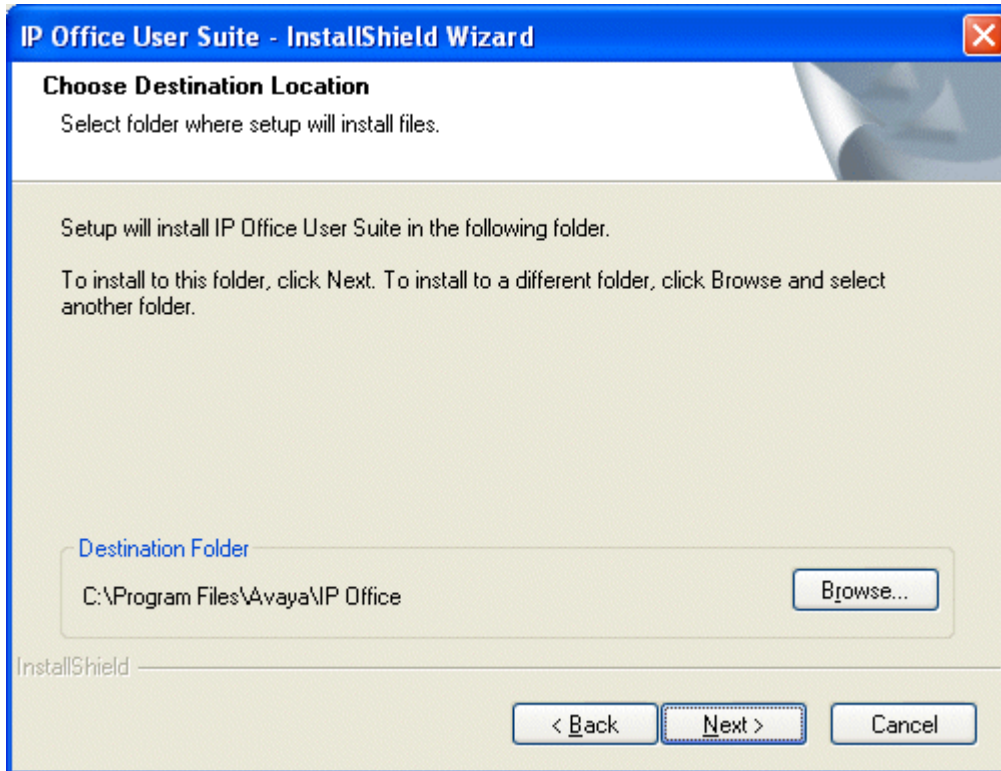
11. Leave the directory setting at default unless absolutely necessary. Click **Next**. The **Setup Type** window appears.
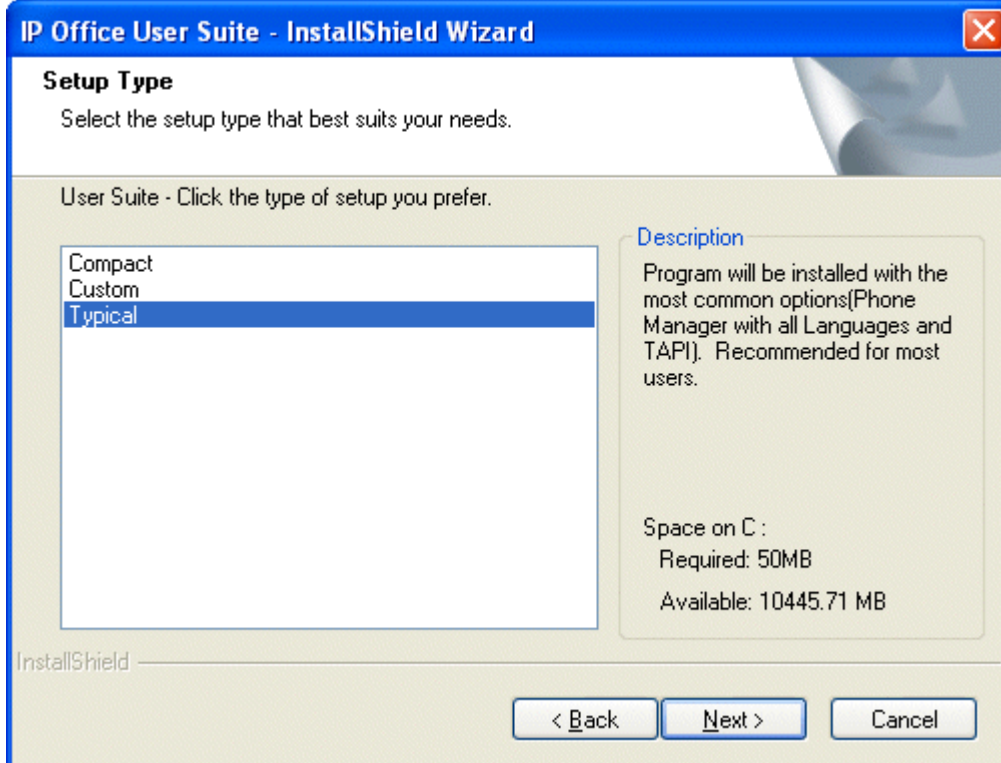
12. Select **Custom**. The **Select Features** window appears.

13. De-select the Phone Manager option and select the **SoftConsole** option. Click **Next**. The **Start Copying Files** window appears. Settings can be changed at this stage.

14. To review or change any settings, click **Back**. Otherwise, click **Next** to begin copying the files. The **Setup Status** window appears. The SoftConsole files may take a few minutes to install.

15. When the installation is complete, 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 13 .

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 User Applications CD. The CD will auto-start the InstallShield Wizard.

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. Click **Next**. The 'Setup Status' window opens and the selected features are upgraded. This may take several minutes.
    When the upgrade is finished, the 'Update Complete' window opens.

5. Click **Finish** to exit the InstallShield Wizard.

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

4. 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.

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

This page is tagged for IP Office standard mode only.

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. Enable the **Apply Custom Skin** checkbox.

3. Enter the file path of the skin file or click **Browse**, select the skin.ini file that represents your chosen skin, and 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.
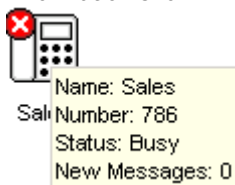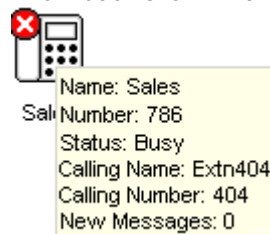
Applying Command Line Options
The following methods apply to programs started via the Windows Start menu. For programs started from a desktop icon, the Target path can be edited by right-clicking on the desktop icon and selecting Properties.

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 program. Right-click on the shortcut icon for SoftConsole and select **Properties**.

4. 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** and close the Explorer window.

7. In the **Customize Start Menu** window, click **OK**.

8. 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. Details are logged in the file called **SoftConsole.log** in the SoftConsole applicaton 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** and restart SoftConsole.

Note: The log file is overwritten each time SoftConsole restarts. If the log results need to be kept, copy the log file to another directory before restarting SoftConsole.

2.8 BLF Operation

This section describes the BLF operation used for the Phone Manager and SoftConsole applications in a Small Community Network.

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 in a Small Community Network exchange user state information with each other.

- IP Office hard-phones exchange user state information with the IP Office to which they are registered using the phone signalling messages embedded in their H.225 stream.

- The SoftConsole and Phone Manager applications receive user state information from the IP Office to which the current application user is logged on, using messages sent out over the data network. The type of message sent depend on whether the application is on 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

Application 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.
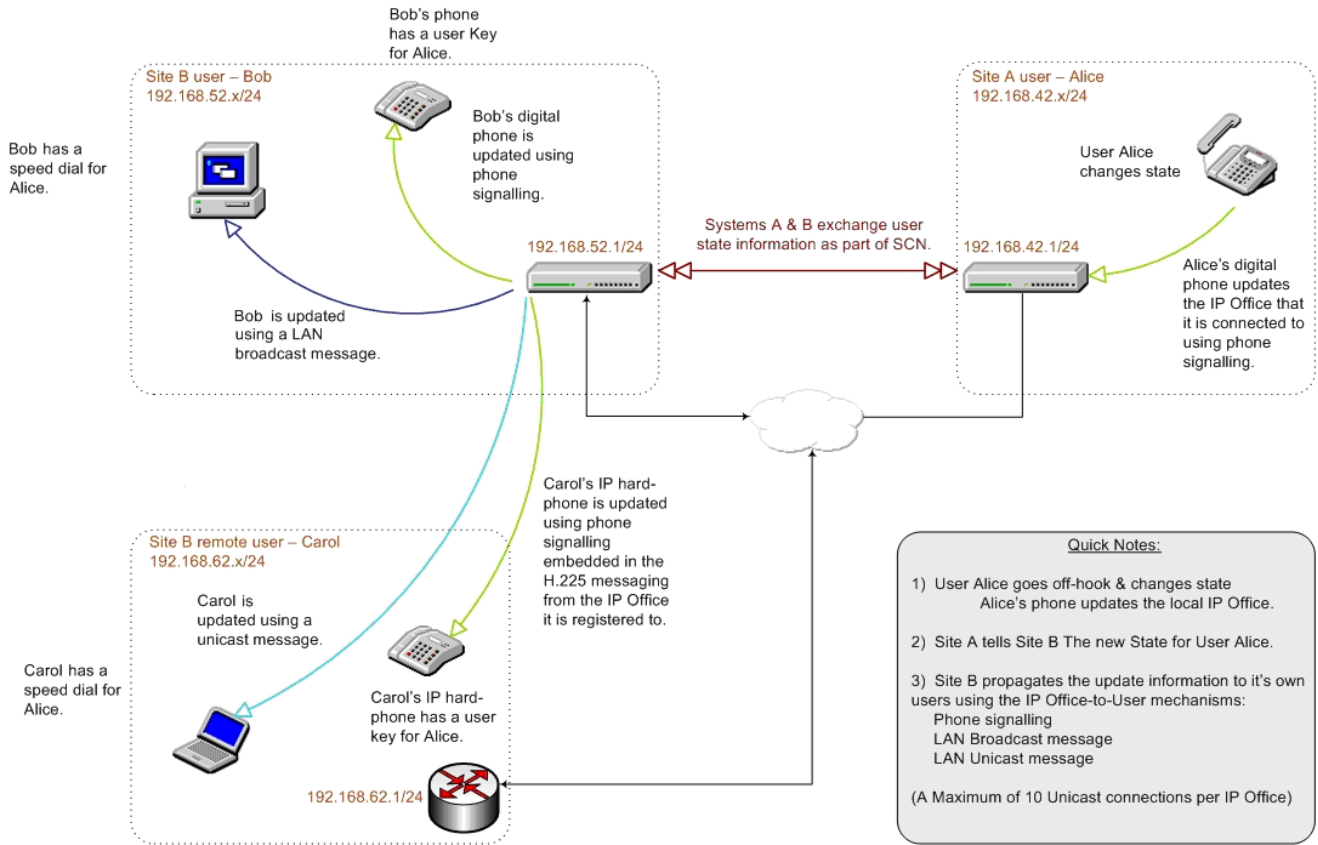
The only limitations of broadcast message BLF updates is the size of subnet:

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.

Remote Network Functionality

When an 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 application is running on. This is a Unicast message. Each IP Office only supports BLF update notifications for 10 remote applications, provided on a first come, first served basis. Upon system start-up, the first 10 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:

Bob's phone
has a user Key
for Alice.

Site B user – Bob
192.168.52.x/24

Bob has a
speed dial for
Alice.

Bob's digital
phone is
updated using
phone
signalling.

Site A user – Alice
192.168.42.x/24

User Alice
changes state

192.168.52.1/24

Systems A & B exchange user
state information as part of SCN.

192.168.42.1/24

Bob is updated
using a LAN
broadcast message.

Alice's digital
phone updates
the IP Office that
it is connected to
using phone
signalling.

Carol's IP hard-
phone is updated
using phone
signalling
embedded in the
H.225 messaging
from the IP Office
it is registered to.

Site B remote user – Carol
192.168.62.x/24

Carol is
updated using a
unicast message.

Carol has a
speed dial for
Alice.

Carol's IP hard-
phone has a user
key for Alice.

192.168.62.1/24

Quick Notes:

1) User Alice goes off-hook & changes state
   Alice's phone updates the local IP Office.

2) Site A tells Site B The new State for User Alice.

3) Site B propagates the update information to it's own
users using the IP Office-to-User mechanisms:
   Phone signalling
   LAN Broadcast message
   LAN Unicast message

(A Maximum of 10 Unicast connections per IP Office)

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