

OFFICESUITE PC CONSOLE INSTALLATION GUIDE

Please follow this Guide to successfully install the OfficeSuite PC Console.

CONSOLE REQUIREMENTS

Recommended Operating Systems:

- Windows XP Professional SP3 (32bit Only)
- Windows Vista SP2 (32 & 64 bit)
- Windows 7 (32 & 64 bit)
- Windows 8 (32 & 64 bit)
- Virtual Machine not supported

The following versions of Microsoft Outlook are supported:

- Outlook 2003 (32 bit only)
- Outlook 2007 (32 bit only)
- Outlook 2010 (32 bit only)
- Outlook 2013 (32 bit only)

PROCEDURE – INSTALLATION

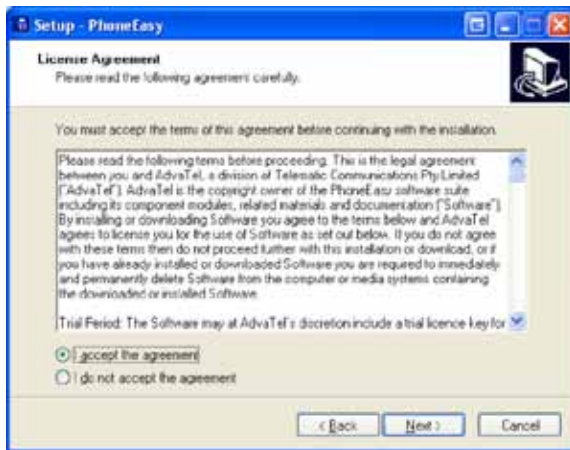
1. Log into the PC with a User account having Administrator rights.
(For Windows Vista and Windows 7 installations, please refer to Appendix A for additional Instructions)
2. Launch the PhoneEasy installation by double clicking on **PhoneEasy_IP_Console_Metaswitch_Setup.exe**.
3. Click **OK** on the Language Selection.



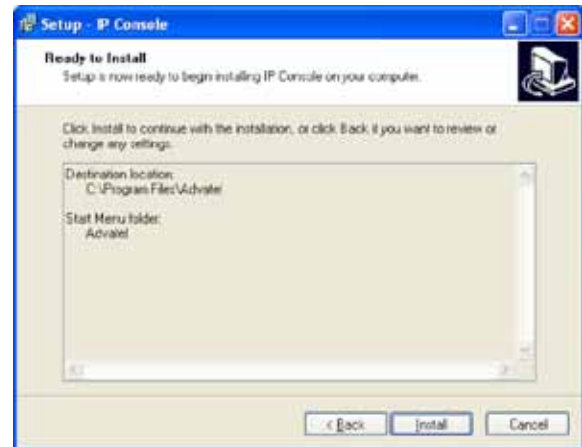
4. Click **Next** on the Welcome to Setup Wizard Screen.



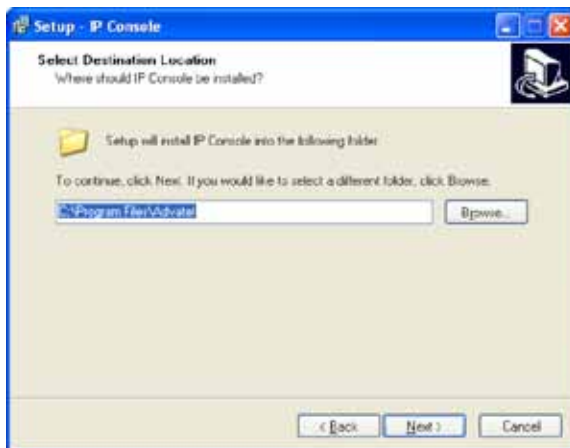
5. Accept licence and click **Next**.



8. Review the installation information on the Ready to Install screen and if acceptable click **Install**.



6. Click **Next** on the Select Destination Location screen.



9. Click **Finish** on the Completing the Setup Wizard screen and the Configuration Wizard will start.



7. Click **Next** on the Start Menu Location screen.



10. Click **Next** on the Welcome to SIP Configuration Wizard Screen.



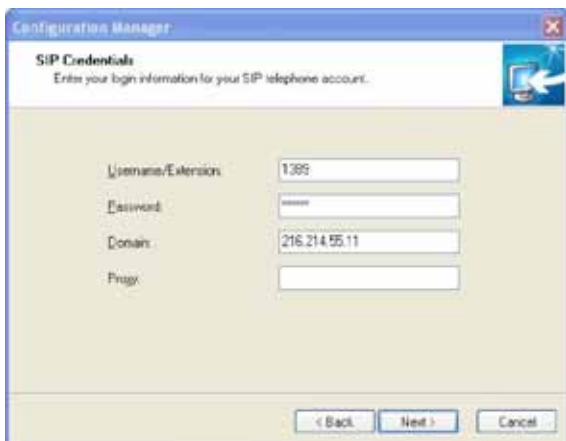
11. Click on **Phone and Modem Options** to specify the Country & Area code then click **Next**.



13. Select not to launch PhoneEasy Client and Click **Finish** on the Configuration complete Screen.



12. Specify the Username (Your OfficeSuite extension), Password (Your OfficeSuite PIN), Domain (please reference your Welcome Letter) & Proxy (leave blank) of the SIP Credentials and then click **Next**.



14. After the installation process the following items are installed onto the computer under **Start> All Programs>AdvaTel> IP Console & Licensing** (Activation & Deactivation).

15. Start the PhoneEasy Client and you will need to activate the license for your client via the Licence Activating Wizard. (Internet access is required for this)



CONFIGURATION – PROCEDURE

1. You will first need to load your contacts. There are two ways to perform this task:
 - **Add contacts manually by selecting the appropriate tab from the top** (Internal, External, Directory, Favorites)
 - a. Right click inside the contacts area and select **New**
 - **Import/Export a .csv file**
 - a. Export the contact list into a .csv file
 - b. Match the contact schema (see Appendix B)
 - c. Select file from the top navigation
 - d. Select **Export/Import** the internal contacts
 - e. Select **Browse**
 - f. Select **Import**
2. To monitor contacts, right click on one or more internal contacts and select **Monitor contact**.
Note: Only the internal contacts will have their BLF monitored.
3. Configure the SIP Settings under **Tools>Options>SIP Settings**
 - a. Username: Your OfficeSuite extension
 - b. Password: Your OfficeSuite PIN
 - c. Domain: Please refer to the Welcome Letter
 - d. Proxy: Leave this Blank.
 - e. Port: 5060
 - f. Set the Feature Settings as per your Switch configuration:
 - Unpark (Leave this Blank)
 - Music on Hold (Leave this Blank)
 - Resource List. (Leave this Blank)
 - Directed Pickup (Select “Do not need to dial a code”. This enables right-click to “Pickup” a ringing Internal Contact which is being monitored).
 - MWI Extension (Leave this Blank)
 - g. Set the Audio Settings accordingly.
4. Next Select **Tools-Options-Call Settings-Outgoing Calls** from the PhoneEasy Desktop window.
Put in the following settings:
Incoming calls
“Voicemail number” – *98 will allow you to see a message waiting indicator light when you select Voicemail as a Flexkey setting.
Outgoing calls
“Length of Internal Numbers” – Enter 5.
Password – the password that is used to access the SMS gateway (Provided by Messagenet).
5. Click **OK** to save the changes.

CONFIGURATION – OUTLOOK

1. From the Console menu, select **Tools**, and click the **Options** selection.
2. From the Options pop-up menu, select the **Directory Settings**, and click on the **Logon to Outlook** setting.
3. Click **OK** to save.
4. From the Console menu, select **Tools**, and click the **Options** selection.
5. From the Options pop-up menu, select the **My Workgroup**, and click on the **Mine Outlook Calendars** setting.

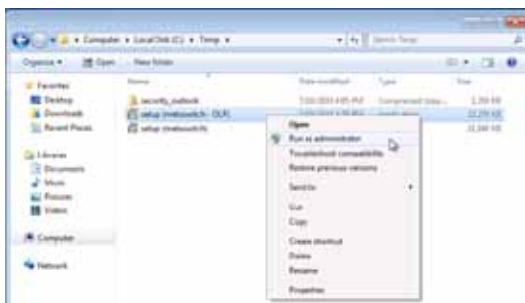
Appendix A

WINDOWS VISTA & WINDOWS 7 INSTALLATION

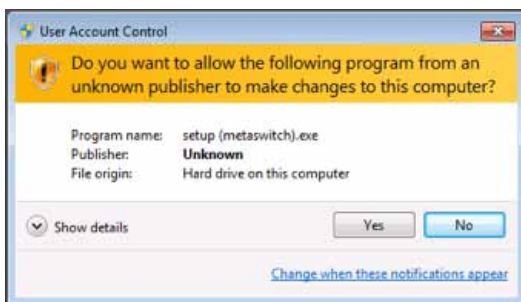
1. (Standalone) Log into the PC with Local Administrator rights (Administrator, Default User) or the Domain Administrator User (Networked)
2. (Networked) Log into the PC with the Domain Administrator User
3. If the Domain Administrator User (Networked) login is not available, then a user with "Administrators," "Domain Admins" & "Domain Users" group membership is required.



4. Launch the PhoneEasy installation by right clicking on **Setup.exe** and selecting **Run as administrator**.

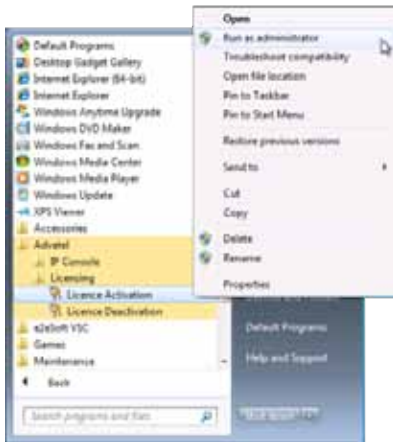


5. Allow the installation to commence by clicking **Yes** to the UAC warning.
Note: If you are prompted for a username and password at this step, your current login does not have sufficient rights to perform a successful installation. Cancel the setup and log into the PC with a user account of sufficient privilege level, as defined in Step 3.

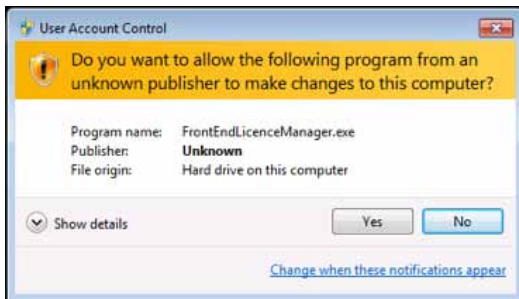


6. Follow Steps 3 to 14 on pages 1 to 7 to complete the installation.

7. After installation is complete, Activate the license by right clicking on **License Activation** found in **Start>All Programs>AdvaTel>Licensing**



8. Allow the Application by clicking **Yes** to the UAC warning.
Note: If you are prompted for a username and password at this step, your current login does not have sufficient rights to perform a successful installation. Cancel the setup and log into the PC with a user account of sufficient privilege level, as defined in Step 3.



9. Complete the required fields in the License Activation Wizard
10. Log off the PC
11. Log into the PC with any "User" account
Upon successful installation OfficeSuite PC Console is now available for use by any users logged into the PC.
Note: Each new user will be required to configure SIP settings and Contacts, these settings are saved for future logins by the same user.

Appendix B

MATCHING THE CONTACT SCHEMA

1. To load your Internal OfficeSuite contacts you will need to visit the OfficeSuite Portal
2. Under Contact Lists select Internal Contacts
3. At the bottom of the page there is an Export option. Be sure to select CSV
4. Please make sure that the CSV columns are in this order:

first_name last_name primary_number mobile_number department location email user_1 user_2