



Configuring

AdvaTel

PhoneEasy IP Console rel 1.3.4.2739
and
PhoneEasy Desktop rel 2.0.2.2739

for use with

Nortel

Software Communication System

(SCS) Release 3.0

Task Based Guide

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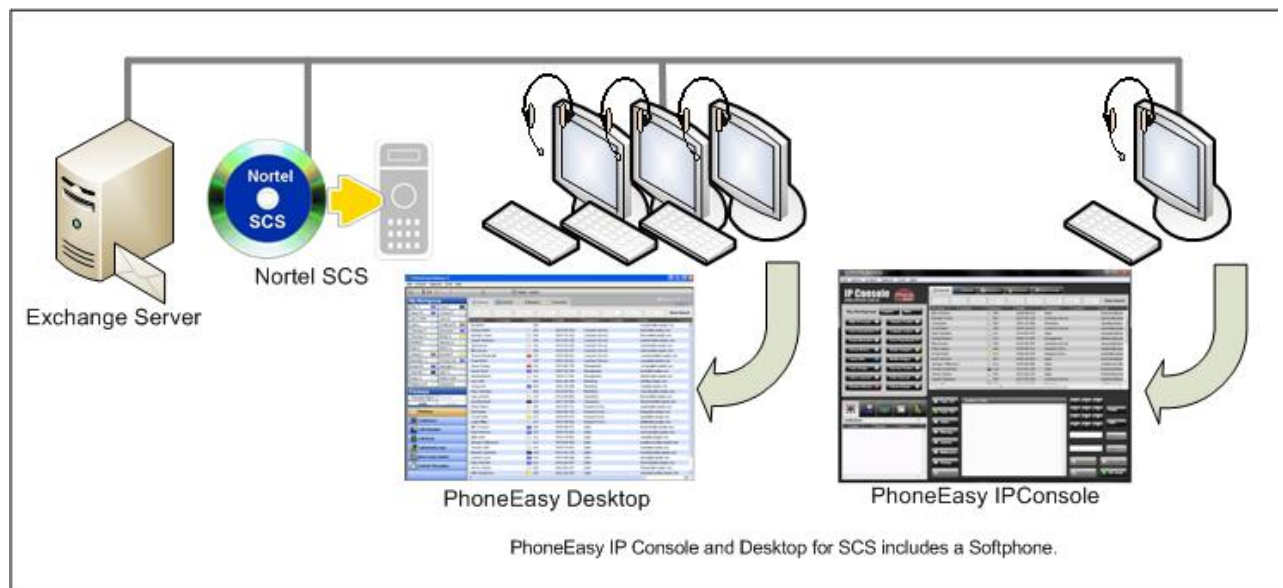
AdvaTel PhoneEasy

Overview

The AdvaTel PhoneEasy IP Console and PhoneEasy Desktop products are software only SIP user agent applications which include a softphone and provide Unified Communications to a user's desktop through the integration of voice, email, PC Based SMS and presence information (phone state and Outlook® calendar mining) in one solution.

The purpose of this brief guide is to familiarize the reader with the AdvaTel PhoneEasy solutions, and to guide the reader through the process of configuring the PhoneEasy products for use with Nortel Software Communication System (SCS) Release 3.0.

For comprehensive information on features and functionalities beyond initial configuration and pairing with SCS, please refer to the SCS 'End User' guide as well as www.advatel.com.au



Requirements

The following are the minimum requirements to successfully install and run the AdvaTel PhoneEasy products:

- 1 PhoneEasy IP Console license & software, or 1 PhoneEasy Desktop license & software
- Microsoft Outlook® (optional) for email integration, calendar mining, and contact retrieval functionality. The following versions of Microsoft Outlook® and Microsoft® Exchange are supported for use with PhoneEasy software:
 - Outlook 2007
 - Outlook 2003
 - Outlook 2002
 - Exchange 2000
 - Exchange 2003
- Lotus Notes™ (optional) version 7.0. PhoneEasy IP Console and PhoneEasy Desktop can retrieve contact information from Lotus Notes™ version 7.0.

The PhoneEasy Client PC requirements are listed below:

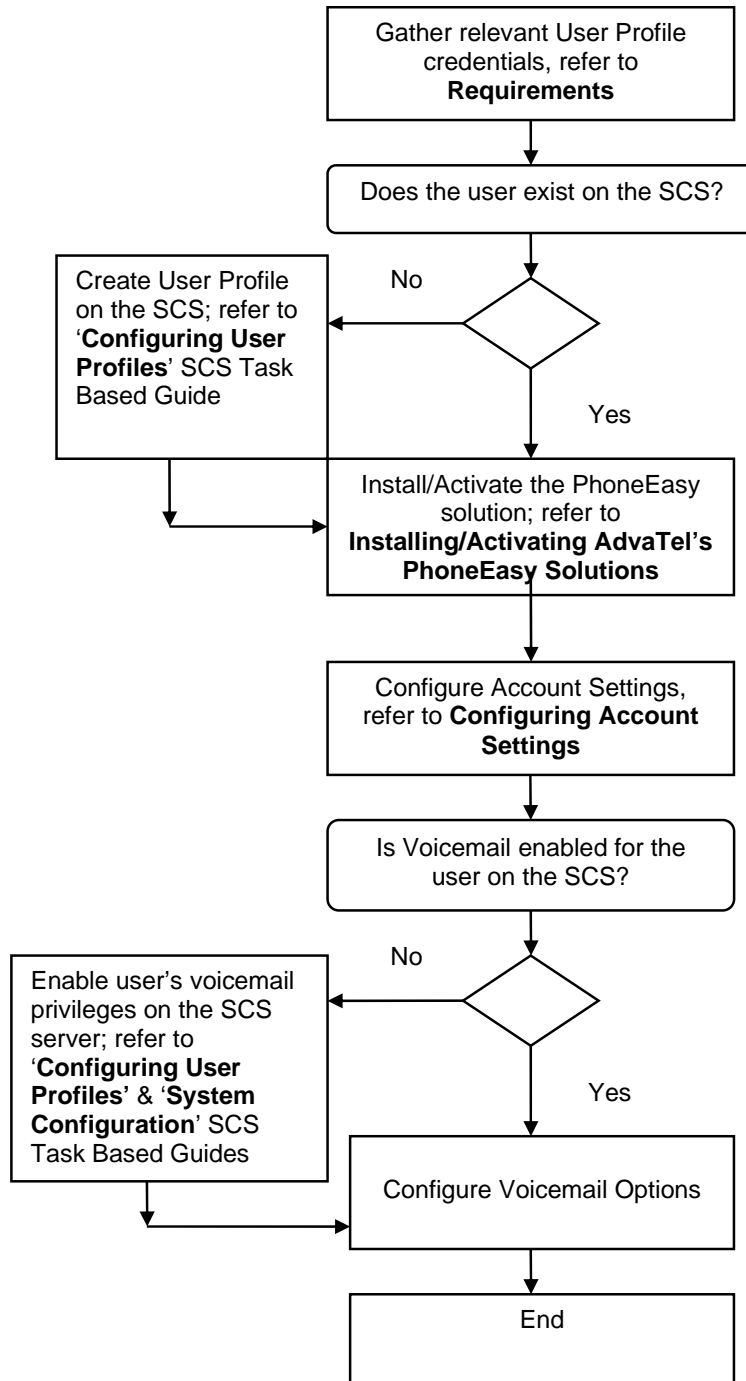
- A PC running one of the operating systems listed below. Please ensure that the PC hardware exceeds Microsoft's minimum hardware requirements for the chosen operating system.
 - Windows XP Professional SP2
 - Windows 2000 Professional SP4
 - Windows Vista
 - Virtual Machine not supported
- A minimum of 72 MB of unused RAM. To confirm that this amount of memory is available, after booting the PC, ensure that the Available Physical Memory value (found on the Performance page of the Windows Task manager) is greater than 72 MB.
- A Network Connection. The PhoneEasy Client PC needs to be accessible via TCP/IP on the customer LAN / WAN.
- Windows Installer v3.0 or later. This may require that a Service Pack be installed prior to the Client installation.
- MS .NET Framework 2.0 (minimum)
- Microphone & speakers or a headset

- DirectX 9.0c or better

Before attempting to configure an account on a PhoneEasy product, please ensure that a valid user account has been set up on the SCS platform. The following information will be required during PhoneEasy account configuration:

- The fully qualified domain name of the SCS platform
- A valid SCS User ID
- The SIP Password associated with the User
- User's Resource List Uniform Resource Identifier (URI)
- Unpark & Directed Pickup Code
- Voicemail Number
- Music on Hold URI
- Call Park locations

Flow Chart



Installing/Activating AdvaTel's PhoneEasy Solutions

Installation Procedure

To install AdvaTel PhoneEasy IP Console or PhoneEasy Desktop:

- 1) Log into the PhoneEasy Client PC as a User with administrator rights.
- 2) Launch the PhoneEasy installation by double clicking setup.exe.
- 3) Click **Next** on the **Welcome to Setup Wizard** screen.
- 4) Accept the license, click **Next**, and click **Next** again.
- 5) On the **PhoneEasy Server Install** screen select **Client Only Installation** and click **Next**.
- 6) Click **Next** on the **PhoneEasy Clients** screen.
- 7) Select **SIP** for **Client Install Type** and click **Next**.
- 8) Check the checkbox for **PhoneEasy Desktop** or **IP Console (Modern or Classic Skin)** and **PhoneEasy IQ**, and click **Next**.
- 9) On the **PhoneEasy Client Settings** screen select **Install 'Stand-alone' PhoneEasy client software**, and click **Next**.
- 10) Click **Next** on the **Select Destination Location** screen.
- 11) Click **Next** on the **Start Menu Location** screen.
- 12) Review the installation information on the **Ready to Install** screen and if acceptable click **Install**.
- 13) Click **Finish** on the **Completing the Setup Wizard** screen and the Configuration Wizard will start.
- 14) Click **Next** on the **Welcome to SIP Configuration Wizard** screen.
- 15) Click on **Phone and Modem Options** to specify the Country & Area code, and click **Next**.
- 16) Specify the Local & International Dialling Prefixes, and click **Next**.
- 17) Specify the **Username**, **Password**, **Domain** (FQDN of SIP Server e.g. sip.example.local) & **Proxy** (if applicable) of the **SIP Credentials**, and click **Next**.
- 18) Specify the **Resource List URI**, and click **Next**.
- 19) Specify the **Call Park locations** and click **Next**.
- 20) Select not to launch PhoneEasy Client and Click **Finish** on the **Configuration Complete** screen.

Activation

- 1) During the installation process the following items are added to the Start menu:
 - Start> All Programs> AdvaTel>**
 - a) **PhoneEasy and/or IP Console**
 - b) **PhoneEasy IQ**
 - c) **Licensing (Activation & Deactivation)**

- 2) Start PhoneEasy IP Console or PhoneEasy Desktop and activate the PhoneEasy license via the License Activating Wizard. **(Note that internet access is required for this)**

Configuring Account Settings

<p>Note: Before attempting to configure SCS account settings on the PhoneEasy, ensure that a valid user profile exists on the SCS.</p>

The following section details the procedure used for configuring an SCS user profile in AdvaTel's PhoneEasy IP Console or PhoneEasy Desktop. You will need to know the following user and domain information:

- **User SIP Address** – The user name of the SCS account holder in its full SIP address format , e.g. user@scshost.domain.com

- **SIP Password** – The password used by the user profile to initiate communication. This password is usually generated automatically by the SCS during profile creation, for instructions on retrieving the SIP password from the SCS read the next section, 'Locating the SIP Password'.

- **Domain Name** - The SCS server's domain name. If SRV records are not available on the DNS, the fully qualified domain name (host name and domain name, for example **scshost.scsdomain.com**) must be supplied.

- **Resource List URI** – Adding users with **subscribe to presence** enabled into a speed dial list results in an entry in the resource list. Using a resource list reduces the network load exerted during Busy Lamp Field (BLF) monitoring.

- **Unpark & Directed Pickup Code** – The Unpark & Directed Pickup code is used to retrieve parked calls & Pickup ringing contacts.

Voicemail Number – Programming the Voicemail number enables PhoneEasy IP Console or PhoneEasy Desktop to dial this number when the Voicemail Flexkey is pressed.

- **Music on Hold URI** – The Music on Hold URI enables the PhoneEasy solution to play music for a caller when put on hold.

If the user does not already have a profile configured on the SCS, a new profile must be created before continuing. See the ‘Configuring User Profiles’ SCS Task Based Guide for full instructions on how to create a new profile.

Locating the SIP Password

Note: You will need 'superadmin' user privileges to access the SCS system administrator portal.

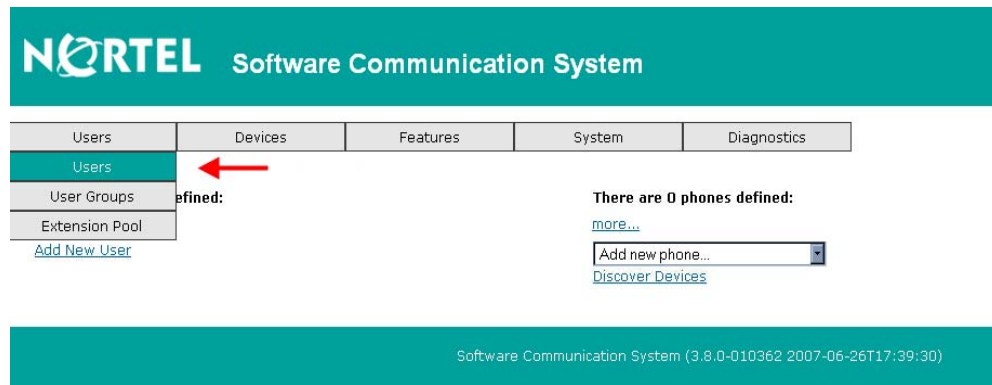
In order to successfully configure a link between the PhoneEasy solution and the SCS, PhoneEasy IP Console or PhoneEasy Desktop must be given a SIP user name and password. Typically, the SIP user name is made up of the SCS **User ID** and the host and domain name, similar to an email address:

1234@scshost.domain.com

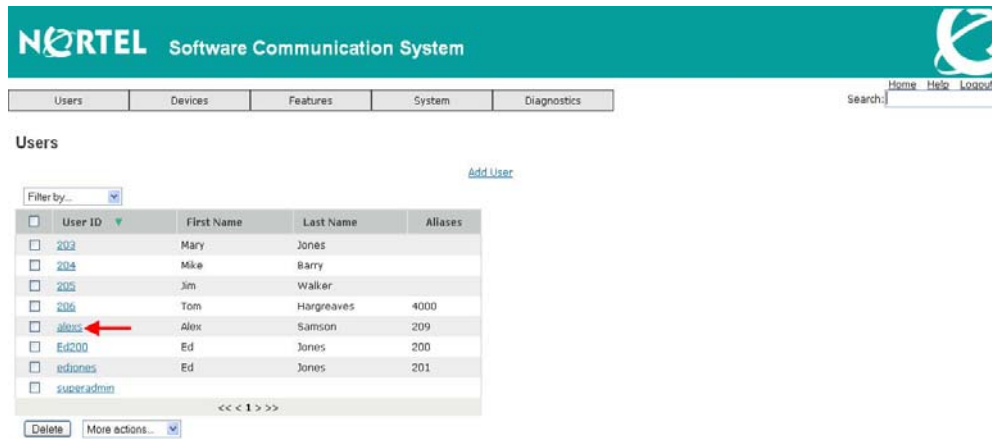
For the purpose of PhoneEasy IP Console or PhoneEasy Desktop configuration, User ID refers to the value before the '@'.

The SIP password is slightly harder to find. The SIP password is used to register the user's phone with the SIP proxy, and it is therefore important that it is a secure password. Because of this security requirement, the SCS automatically generates an alpha-numeric SIP password when an account is created. The password is then 'hidden' from view when the account profile is opened for editing. To find out a user profile's SIP password:

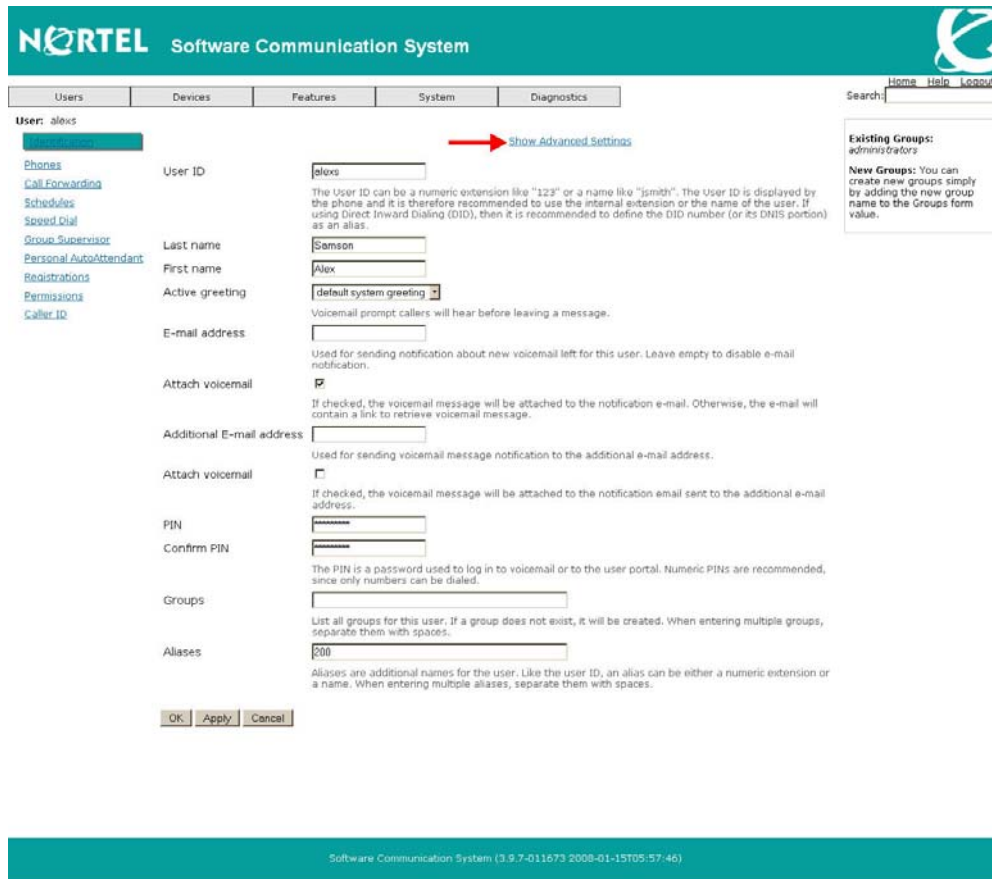
1. Open a web browser and log in to the SCS administrator portal. See 'Configuring User Profiles'.
2. Place the mouse pointer over the **Users** menu and then select **Users**.



3. Select the required user profile from the list displayed on the screen.



- The User Identification screen is displayed. By default, only basic settings are displayed. Click **Show Advanced Settings**.



- The SIP Password is now displayed among the other settings. Highlight the password, right-click and select **Copy**.

NORTEL Software Communication System

Users | Devices | Features | System | Diagnostics

Home | Help | Logout

Search: _____

User: alexs [Hide Advanced Settings](#)

Existing Groups: administrators, general

New Groups: You can create new groups simply by adding the new group name to the Groups form value.

Phones

Call Forwarding

Schedules

Speed Dial

Group Supervisor

Personal AutoAttendant

Restrictions

Permissions

Caller ID

User ID: alexs

The User ID can be a numeric extension like "123" or a name like "jsmith". The User ID is displayed by the phone and it is therefore recommended to use the internal extension or the name of the user. If using Direct Inward Dialing (DID), then it is recommended to define the DID number (or its ONIS portion) as an alias.

Last name: Samson

First name: Alex

Active greeting: default system greeting

Voicemail prompt callers will hear before leaving a message.

E-mail address: alexsamson@teluk.com

Used for sending notification about new voicemail left for this user. Leave empty to disable e-mail notification.

Attach voicemail:

If checked, the voicemail message will be attached to the notification e-mail. Otherwise, the e-mail will contain a link to retrieve voicemail message.

Additional E-mail address: _____

Used for sending voicemail message notification to the additional e-mail address.

Attach voicemail:

If checked, the voicemail message will be attached to the notification email sent to the additional e-mail address.

PIN: _____

Confirm PIN: _____

The PIN is a password used to log in to voicemail or to the user portal. Numeric PINs are recommended, since only numbers can be dialed.

SIP password: M1R0T0P

The SIP this syst unmana security

's phone to register with the SIP proxy. For phones managed by J here will be configured automatically on the phone. For 3 is needed when manually configuring lines on the phone. The tant and that is why a secure password is auto-generated.

Groups: _____

List all g separat

209

Aliases are additional names for the user. Like the user ID, an alias can be either a numeric extension or a name. When entering multiple aliases, separate them with spaces.

OK | Apply | Cancel

Software Communication System (3-9-4-011030 2007-10-21T21:05:18)

6. Open PhoneEasy IP Console or PhoneEasy Desktop and configure user credentials.

Setting User Credentials and Information

Select Tools> Options> SIP Settings

SIP Settings

Edit Monitored Lines...

Network settings
Changes to the network settings will not take effect until IP Console has restarted.

Local network adapter

Username: 200
 Password: ****
 Domain: scs.example.local
 Proxy:
 Port: 5060

Network: Windows Default
 IP Address: 0.0.0.0

Unpark

No Unpark
 Do not need to dial a code
 Dial the following code then the extension number

*4

Music on Hold
Provide the full address of the Music on Hold server if hold music is desired, e.g. ~*~mh*~@myswitch

~*~mh*~@scs.example.local

Resource List
Provide the full address of the Resource List for your server, e.g. ~*~rl*~@myswitch

Group Pickup

No Group Pickup
 Do not need to dial a code

OK Cancel Help

1 of 2

SIP Settings

Unpark

No Unpark
 Do not need to dial a code
 Dial the following code then the extension number

*4

Music on Hold
Provide the full address of the Music on Hold server if hold music is desired, e.g. ~*~mh*~@myswitch

~*~mh*~@scs.example.local

Resource List
Provide the full address of the Resource List for your server, e.g. ~*~rl*~@myswitch

Group Pickup

No Group Pickup
 Do not need to dial a code
 Dial the following code

*79

Directed Pickup

No Directed Pickup
 Do not need to dial a code
 Dial the following code then the extension number

*78

Enable extended SIP event logging

OK Cancel Help

2 of 2

- a) **Edit Monitored Lines:** List of lines to be monitored. The list of available lines will be populated from your internal directory. You must add any Park Orbits to the **Edit Monitored Lines** dialog in order to use the Park Flexkey, as this flexkey must be linked with a Monitored Line and not a Resource List line.
- b) **Username:** The username portion of your registration credentials required to establish a connection with your telephone service (eg. 200)
- c) **Password:** The password portion of your registration credentials.
- d) **Domain:** The domain name of the user account (eg. scs.example.local).
- e) **Proxy:** Some telephony services, internet gateways, or firewalls may require SIP traffic to be routed through a proxy server. Enter the name or address of the proxy, where required.
- f) **Port:** The IP port number to connect to for SIP signalling. (Default is 5060 and should not need to be changed)
- g) **Network:** The list of available network adapters which can be used for SIP traffic. Choosing one of the values listed below selects a particular network adapter. The default value is **Windows Default**. The default value is recommended for most circumstances.
 - **Windows Default** selects the Windows Default Adapter.
 - **Local Area Connection** selects a local NIC Card.
 - **IP address specified below** selects the adapter based on the IP address specified in the **IP Address** field.
- h) Set the Feature Settings as per the SCS configuration:
 - **Unpark** (The default is *4. This enables the user to retrieve parked calls by clicking on the “Park” Flexkey.)
 - **Music on Hold** URI (e.g. ~~mh~@scs.example.local)
 - **Resource List** URI. Refer to Appendix B for more information on how to get the Resource List URI.
 - **Directed Pickup** (The default is *78. This enables a user to “Pickup” a ringing Internal Contact by a right-click.)

Note: The Unpark & Directed Pickup codes can be found in the SCS GUI at **System> General> Call Pickup**

- i) Set the Audio Settings accordingly.

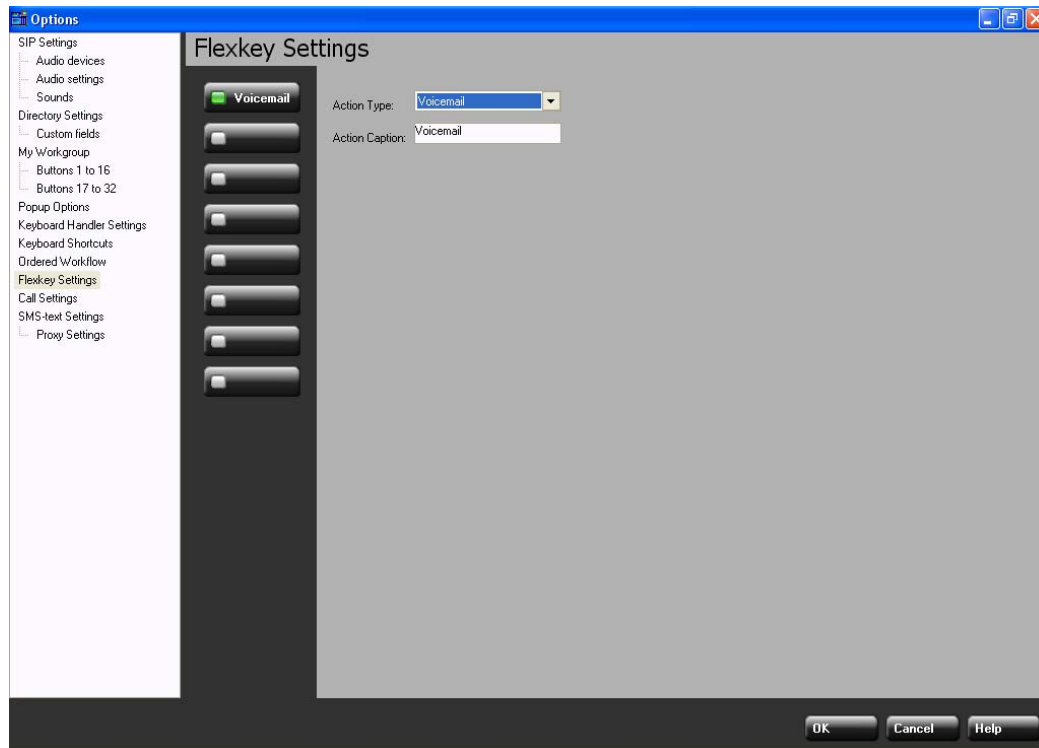
Note: Changes to Network Setting will not take effect until PhoneEasy is restarted.

Voicemail Settings

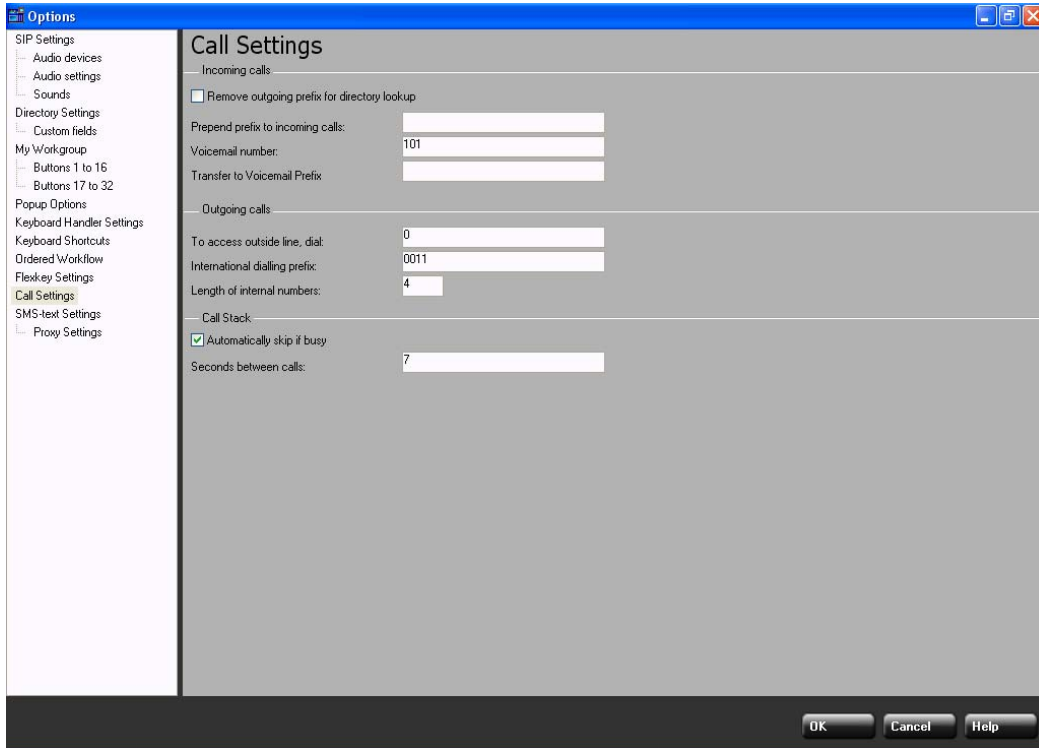
Note: Call forwarding to voicemail is controlled by the SCS. Ensure that voicemail has been activated on the SCS for the user in question.

To set call forwarding to voicemail, see the SCS 'Voicemail Setup and Operation' SCS Task Based Guide. Some settings can be configured within the PhoneEasy interface as follows:

1. Select **Tools> Options> Flexkeys** and configure a Voicemail Flexkey

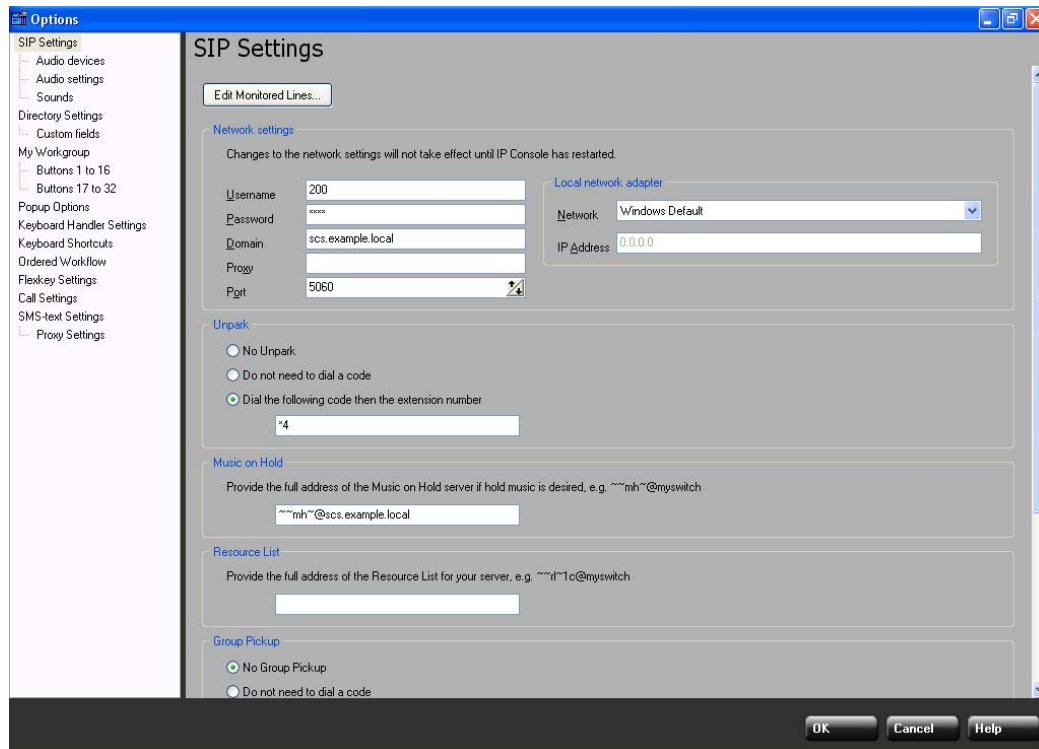


2. Select **Tools> Options> Call Settings** and configure the **Voicemail Number** (Note that "101" is the default value).



Music on Hold Settings

Select **Tools> Options> SIP Settings** and provide the address of the Music on Hold server.



Multiple Accounts

PhoneEasy IP Console and PhoneEasy Desktop do not support Multiple Accounts.

Other Features and Functions

PhoneEasy Configuration

1. Load the PhoneEasy Internal, External, Emergency & Favourites Directory into PhoneEasy Client via the PhoneEasy Desktop by selecting **File> Export/Import** and using a CSV file. The easiest way to familiarize yourself with importing and exporting a PhoneEasy directory is to insert one or two entries into a blank directory, export it, review the resulting exported CSV file, and make a change or two before importing it again into PhoneEasy. Refer to Appendix A for more information on import/export formats.

Note: Only the Busy Lamp Fields (BLF) of internal contacts will be monitored.

2. Select **Tools> Options> Call Settings> Outgoing Calls** from the PhoneEasy Desktop window. Enter the following settings:

For Incoming Calls:

- **Voicemail number**, e.g. "101". The Voicemail number can be found in the SCS GUI by selecting:

System> DialPlan> Call Pickup> Voicemail> Voicemail extension.

For Outgoing Calls:

- **To access Outside Line**, e.g. "9"
- **International Dialling Prefix**, e.g. "011"
- **Length of Internal Numbers**, e.g. "4"

3. If required, select **Tools> Options> SMS Settings> Gateway Info & Proxy Settings** and enter the **User Name** and **Password** (Note that these are the User Name and Password required to access the SMS gateway, and which are provided by Messagenet) and **Proxy Settings** (provided by the system administrator). The URL at which you can register for a Messagenet account is <https://www.messagenet.com.au/advatel/>.

Ensure **Tools> Options> SMS Settings> Gateway Info** is set to:

<https://www.messagenet.com.au/dotnet/Lodge.aspx/LodgeSMSMessageWithReply>.

4. Click **OK** to save the changes.

Referenced Documents

- SCS Configuring User Profiles Task Based Guide
- SCS System Configuration Task Based Guide
- SCS Voicemail Setup and Operation Task Based Guide
- SCS End User Task Based Guide
- SCS Troubleshooting Task Based Guide

Appendix Almpoort/Export Formats

Internal Directory

first_name	last_name	primary_number	mobile_number	department	location	email	user_1	user_2

External Directory

first_name	last_name	primary_number	mobile_number	organization	address	email	user_1	user_2

Emergency Directory

contact_name	primary_number	call_type	description

Favourites Directory

contact_id	source_table_id	source_contact_id	first_name	last_name	primary_number	mobile_number	email

Appendix B Resource List URI

Populating a Resource List

The Speed Dial list must be populated with at least one entry by either the user or the administrator before the Resource List URI can be determined.

To populate the Resource List, login to the SCS as an individual user, Go to Speed Dial and enter the respective numbers making sure to tick the subscribe to presence.

Entering the numbers into the user's speed dial list reduces the network load exerted during BLF monitoring.

This approach is much more scalable and versatile compared to a peer-to-peer approach where every phone would subscribe for presence directly with the other phone. Tests have shown that the peer-to-peer approach can cause exponential network traffic growth that impacts negatively on a network's performance.

Note: Some firmware versions for the LG-Nortel 68xx series phones suffer a "Call waiting" BLF status limitation. See <http://track.sipfoundry.org/browse/XTRN-140> for more information.

Determining a User Resource List URI for SCS Release 2.0

The administrator must:

1. SSH login to SCS (with the root username and password), to obtain the information which resides in the `/etc/sipxpbx/resource-lists.xml` file.
2. Run the following single command to extract the information substituting the user's SIP username for `<Username>`:

```
ruby -e 'require "rexml/document"; include REXML; Document.new(File.new("/etc/sipxpbx/resource-lists.xml")).elements[1].elements.each {|x| if x.elements["name"].text==ARGV[0] then puts "--> #{x.attributes["user"]}@#{`hostname`}" end}' <Username>
```

Determining a User Resource List URI for SCS Release 3.0

The Resource List URI for a user can be determined by:

`~~rl~F~[USER]@[DOMAIN]`

Appendix C Example of PhoneEasy Configuration

Assumptions:

- 1) The address of the SCS is scs.example.local
- 2) The SCS release is Release 3.0
- 3) Internal extensions are 3 digits long
- 4) The internal extensions are 200 through 210 (inclusive)
- 5) The user being configured is at extension 200
- 6) Park orbits are at 300 and 301
- 7) Voicemail is 101
- 8) Unpark is achieved by dialing *4<Park Orbit Extension> e.g. *4300
- 9) Call Pickup is achieved by dialing *78<Ringling Extension> e.g. *78201
- 10) Music on Hold is available at ~~mh~@scs.example.local

Configuring PhoneEasy:

- 1) User 200 logs into the web configuration page for the SCS at <http://scs.example.local>
- 2) The user logs into SCS and configures extensions 201 through 210 (inclusive) in the Speed Dial settings - remembering to check the **Subscribe to Presence** check-box
- 3) The administrator logs into the SCS via SSH and runs the ruby command provided in Appendix B, which returns a resource list URI of “~~rl~5@scs.example.local”
- 4) The following steps are performed by the user:
- 5) Install PhoneEasy IP Console
- 6) Enter 200 as the username and the password
- 7) The domain is scs.example.local
- 8) Enter the resource list URI as determined in step 3) above - **~~rl~5@scs.example.local**
- 9) Enter 300 and 301 for the Park locations
- 10) Run PhoneEasy IP Console
- 11) Add contacts in the PhoneEasy internal directory for each extension 201 through 210 and for the park locations 300 and 301
- 12) Select **Tools> Options> SIP Settings** and click **Edit Monitored Lines...**
- 13) Ensure that the two park locations are in the list **To be Monitored** (Right hand side). Other extensions are not required to be in this list as they are in the resource list

- 14) Confirm that the network settings are set as configured by the wizard
- 15) Ensure Unpark is set as **Dial the following code then the extension number** and a value of *4 is entered
- 16) Ensure that Music on Hold is set to **~~mh~@scs.example.local**
- 17) Ensure that the Resource List is set to **~~rl~5@scs.example.local**
- 18) Ensure that group pickup is set as **No group pickup**
- 19) Ensure that Directed Pickup is set as **Dial the following code then the extension number** and a value of *78 is entered
- 20) Select **Flexkey Settings**
- 21) Program 2 Park flexkeys, select line 300 for the first and 301 as the second line
- 22) Program a Voicemail flexkey
- 23) Select **Call Settings**
- 24) Enter **101** as the voicemail number
- 25) Ensure that the **Length of internal numbers** is correct (3 for this example)
- 26) Click **OK**