SmartServer

User Guide

Contents

SmartServer End User License Agreement

This End-User License Agreement (EULA) covers the SmartServer software product.

IMPORTANT - READ CAREFULLY: This End-User License Agreement ("EULA") is a legal agreement between you (either an individual or a single entity) ("YOU") and Oak Telecom Ltd ("OAK") for the OAK product(s) accompanying this EULA, which include(s) computer software and may include "online" or electronic documentation, associated media, and printed materials ("SOFTWARE PRODUCT"). An amendment or addendum to this EULA may accompany the Product. By installing, copying, or otherwise using the SOFTWARE PRODUCT or any UPDATES (as defined below), YOU agree to be bound by the terms of this EULA. If YOU do not agree to the terms of this EULA, do not install, copy, or otherwise use the SOFTWARE PRODUCT; however, YOU may return it to your place of purchase for a full refund. In addition, by installing, copying, or otherwise using any updates or other components of the SOFTWARE PRODUCT that YOU receive separately as part of the SOFTWARE PRODUCT ("UPDATES"), YOU agree to be bound by any additional license terms that accompany such UPDATES. If YOU do not agree to the additional license terms that accompany such UPDATES, YOU may not install, copy, or otherwise use such UPDATES.

SOFTWARE PRODUCT LICENSE
Copyright laws and international copyright treaties, as well as other intellectual property laws and treaties protect the SOFTWARE PRODUCT. This EULA does not grant YOU any rights in connection with any trademarks or service marks of OAK. All title and intellectual property rights in and to the SOFTWARE PRODUCT (including but not limited to any images, photographs, animations, video, audio, music and text incorporated into the SOFTWARE PRODUCT), the accompanying printed materials, and any copies of the SOFTWARE PRODUCT, are owned by OAK. YOU may not copy the printed materials accompanying the SOFTWARE PRODUCT. This EULA grants YOU no rights to use such content. All rights not expressly granted under this EULA are reserved by OAK.

The SOFTWARE PRODUCT is licensed, not sold. The SOFTWARE PRODUCT is licensed to YOU for use on a single computer only. The SOFTWARE PRODUCT may not be installed, accessed, displayed, run, shared or used concurrently on or from different computers, including a workstation, terminal or other digital electronic

device. YOU may not make access to THE SOFTWARE PRODUCT available to others in connection with a service bureau, application service provider, or similar business. If OAK has not provided YOU with a back-up copy of the SOFTWARE PRODUCT, YOU may make a single back-up copy of the SOFTWARE PRODUCT. YOU may use the back-up copy solely for archival purposes. Except as expressly provided in this EULA, YOU may not otherwise make copies of the SOFTWARE PRODUCT, including the printed materials accompanying the SOFTWARE.

LIMITED WARRANTY. OAK warrants that (a) the SOFTWARE PRODUCT will, for a period of ninety (90) days from the date of delivery, perform substantially in accordance with OAK's written materials accompanying it, and (b) any Support Services provided by OAK shall be substantially as described in applicable written materials provided to you by OAK.

CUSTOMER REMEDIES. In the event of any breach of warranty or other duty owed by OAK, OAK'S and its suppliers' entire liability and your exclusive remedy shall be, at OAK's option, either (a) return of the price paid by you for the SOFTWARE PRODUCT (not to exceed the suggested retail price) if any, (b) repair or replacement of the defective SOFTWARE PRODUCT or (c) re-performance of the Support Services. This Limited Warranty is void if failure of the SOFTWARE PRODUCT has resulted from accident, abuse, or misapplication. Any replacement SOFTWARE PRODUCT will be warranted for the remainder of the original warranty period or thirty (30) days, whichever is longer.

NO OTHER WARRANTIES. TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, OAK AND ITS SUPPLIERS DISCLAIM ALL OTHER WARRANTIES AND CONDITIONS, EITHER EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, TITLE AND NON-INFRINGEMENT, WITH REGARD TO THE SOFTWARE PRODUCT AND THE PROVISION OF OR FAILURE TO PROVIDE SUPPORT SERVICES. THE LIMITED WARRANTY GIVES YOU SPECIFIC LEGAL RIGHTS. YOU MAY HAVE OTHERS, WHICH VARY FROM COUNTRY/STATE/JURISDICTION TO COUNTRY/STATE/JURISDICTION. Some countries and states and jurisdictions do not allow disclaimers of or limitations on the duration of an implied warranty, so the above limitation may not apply to you. To the extent implied warranties may not be entirely disclaimed but implied warranty limitations are allowed by applicable law, implied warranties on the SOFTWARE PRODUCT, if any, are limited to ninety (90) days.

IN ADDITION, IN NO EVENT DOES OAK AUTHORIZE YOU TO USE THE SOFTWARE PRODUCT IN APPLICATIONS OR SYSTEMS WHERE THE SOFTWARE PRODUCTS FAILURE TO PERFORM CAN REASONABLY BE EXPECTED TO RESULT IN SIGNIFICANT ENVIRONMENTAL DAMAGE, PHYSICAL INJURY, OR IN LOSS OF LIFE. ANY SUCH USE BY YOU IS ENTIRELY AT YOUR OWN RISK, AND YOU AGREE TO HOLD OAK HARMLESS FROM ANY CLAIMS OR LOSSES RELATING TO SUCH UNAUTHORIZED USE.

All rights of any kind in THE SOFTWARE PRODUCT which are not expressly granted in this EULA are entirely and exclusively reserved to and by OAK. YOU may not rent, lease, lend, modify, translate or create derivative works based on THE SOFTWARE PRODUCT. YOU may not reverse engineer, decompile, or disassemble the SOFTWARE PRODUCT, except and only to the extent that such activity is expressly permitted by applicable law notwitstanding this limitation. The SOFTWARE PRODUCT is licensed as a single product. Its component parts may not be separated for use on more than one computer.

The package for the SOFTWARE PRODUCT may contain multiple versions of this EULA, such as multiple media versions (e.g., in the user documentation and in the software). In this case, YOU are only licensed to use one (1) copy of the SOFTWARE PRODUCT.

YOU may permanently transfer all of your rights under this EULA only as part of a permanent sale or transfer of the SOFTWARE PRODUCT, provided YOU retain no copies, YOU transfer all of the SOFTWARE PRODUCT (including all component parts, the media and printed materials, any upgrades and this EULA), and the recipient agrees to the terms of this EULA. If the SOFTWARE PRODUCT is an upgrade, any transfer must also include all prior versions of the SOFTWARE PRODUCT.

Without prejudice to any other rights, failure to comply with any and all of the terms and conditions of this EULA will result in immediate and permanent termination of this EULA. In such event, YOU must immediately destroy all copies of the SOFTWARE PRODUCT and all of its component parts.

Section One

Introduction

SmartServer Introduction & Requirements

Introduction

Congratulations on your purchase of SmartServer, the world's premier Computer Telephony Integration product. SmartServer is the single, integrated, server-side part of the SmartPhone, SmartConnect, SmartOperator, and SmartCampaign products. However, it is also a useful product in its own right. This manual will guide you all the way through SmartServer, explaining to you all the information that is available at the click of a mouse.

For information on how to install SmartServer, see the section entitled SmartServer Installation Guide. To find out how to set up SmartServer for use in your company, refer to the SmartServer Configuration Guide section. There is also a document of Frequently Asked Questions available for a quick reference of common queries about SmartServer and SmartServer Configuration. All of these documents are available from the Oak Telecom web site: www.oak.co.uk.

This document is broken up into six main parts:
- **SmartServer Introduction & Requirements**: This section contains hardware/software requirements for running SmartServer.
- **SmartServer Installation Guide**: Guides you through installing and uninstalling the SmartServer software.
- **Post-Installation Wizard**: First time installation tasks such as licensing and phone system configuration.
- **Configuration**: Explains all the options available from within SmartServer Configuration.
- **SmartServer User Manual**: Explains what can be done with SmartServer.
- **SmartServer Address Book Plugins**: Shows you how to configure the different address books.

The user manual is further broken up into these areas:
- **Information**: Shows you all the information available from the various tabs of the SmartServer main window.
- **Call History**: Shows you how you can export various call histories.
- **TPS Lists**: Explains how to import/export TPS lists for use with SmartCampaign (where available).

- **Importing Contacts**: Guides you through the one-off import of an address book using the Contact Import Wizard.

The **Information** section is further broken up into these eight sub-sections, corresponding to the eight tabs of the SmartServer main window:
- **System**: Hardware settings, general information, basic network information, and command list.
- **Events**: Events list.
- **Live**: Calls in progress and the status of the extensions being monitored by the system.
- **Cluster**: Composite list of the status of all extensions on all clustered SmartServers (where available).
- **Trunks**: Trunk usage chart/statistics and the status of the trunks being monitored.
- **Network**: SmartPhone clients and the messages sent to SmartPhone clients.
- **External Calls**: Statistics on the inbound, outbound, and missed calls of today.
- **Address Books**: Status of address books, including hit rate, and list of unknown callers.

SmartServer Requirements

If your platform requires a TAPI server PC with its own list of requirements, and that PC will also have SmartServer installed on it, the list of requirements that results in a higher spec will take precedence over the other. E.g. if the requirements for the TAPI server PC are higher than the requirements for SmartServer, the TAPI server requirements will take precedence and are the ones your machine should conform to. If in any doubt, contact Oak Telecom support or your dealer.

Minimum Requirements

- IBM-PC or 100% compatible running Windows 2000 Professional / Server SP2, Windows XP Professional, or Windows Server 2003
- 800 MHz Celeron-class processor
- VGA display
- 256 MB Memory
- 500 MB free hard drive space
- Network adapter bound to a TCP/IP network
- Mouse
- Spare serial port (dependant on phone system)
- **No** modem installed (dependant on phone system)
- Telephony Dialing Rules must be correctly configured

Recommended Requirements

- IBM-PC or 100% compatible running Windows 2000 Professional / Server SP2, Windows XP Professional, or Windows Server 2003
- 2 GHz Pentium III class processor
- SVGA display
- 512 MB memory
- 1 GB free hard drive space
- Network adapter bound to a 100Mbit TCP/IP network
- Mouse
- Spare serial port (dependant on phone system)
- **No** modem installed (dependant on phone system)
- Telephone Dialing Rules must be correctly configured
- CD-ROM drive
- Internet connection (for licensing and remote support)

SmartServer Test Platforms

SmartServer has been tested on the platforms listed below. If you cannot see your platform in the list, please contact Oak Telecom before installation.

Operating Systems
- Windows 2000 Professional and Server SP2, SP3, and SP4
- Windows XP Professional, SP1a, and SP2
- Windows Server 2003, and SP1

Network Configurations
- Client for Microsoft Networks
- TCP/IP with DHCP addressing scheme
- TCP/IP with Static IP addressing scheme

Telephone Systems*
- Aastra Intelligate (Ascotel)
- Alcatel OmniPCX, 4400
- Avaya IPOffice, INDeX, Communication Manager
- Cisco Call Manager (not CME)
- Inter-Tel Axxess
- LG LDK 100, LDK 300
- Mitel 3300
- NEC DXE, XN120, Topaz
- Nortel BCM, Norstar, Meridian
- Panasonic KX-TD, KX-TDA
- Samsung Compact 2, DCS, iDCS, OfficeServ, 7000 series
- Siemens HiCom 2, HiPath 3000 series
- Telrad Connegy
- Toshiba CTX, CITX

* Some PBXs require additional hardware or licenses before SmartServer is able to work with them (more information is available from your supplier)

Section Two

Installation Guide

SmartServer Installation Guide

Before you install SmartServer, you need to choose a suitable PC by reviewing the spec above. The PC needs to have a TCP/IP connection to the local network and a spare serial (or COM) port. This must be a real serial port and not a USB serial port emulator.
NB Some configurations do not require a spare serial port. If you are unsure, contact Oak Telecom or your dealer, or view the relevant PBX Notes document (available from our website).

Before you install the SmartServer software, you will typically need to connect the PBX to your PC. Please discuss this with your telephone maintainer; a switch-specific PBX Notes document is available from our website to help you.

When you are ready to install the software, first make sure that you are logged on to the machine as an Administrator and ensure that no programs are running on the SmartServer machine. Then proceed as directed below.

Installing from a CD-ROM

Insert the CD-ROM into your CD-ROM drive and follow the instructions on screen. If setup does not begin click **Start**, click **Run**, enter **D:\SmartServerSetup.exe** in the **Open** box that appears (replacing **D** with the letter of your CD-ROM drive). Click **OK** and installation will begin.

Installing from an Internet distribution

Use **My Computer** or **Explorer** to browse to the folder where you extracted the SmartServer installation files. Double-click on the **SmartServerSetup.exe** file.

The first screen that appears when SmartServer installation begins is the Welcome screen. Click **Next**.


Now you need to select where to install SmartServer. It is highly recommended you use the default directory. If you want to select another directory, click **Change**. Click **Next** to continue.
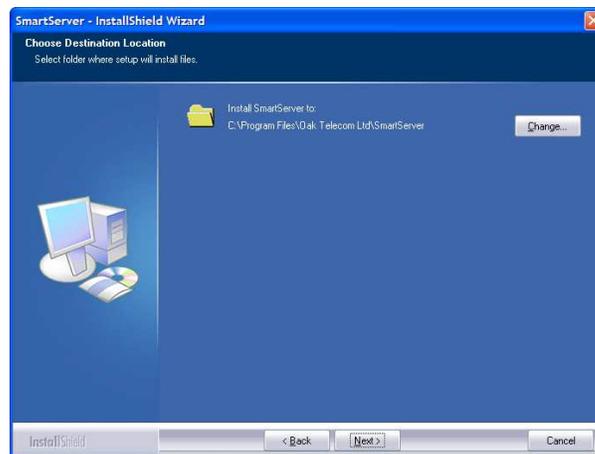
The next screen is your last opportunity to go back and make any changes to your installation options. When you click **Install**, SmartServer will be installed on your computer.
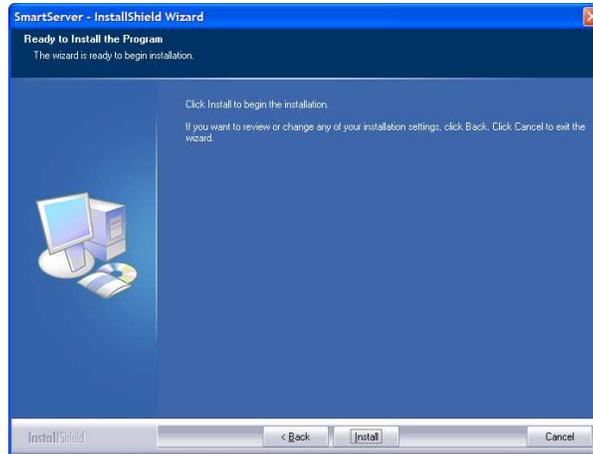
When installation is complete, you will see the screen shown above. Click **Finish** to exit the installation program and start the Post-Installation Wizard. The Wizard will help you connect SmartServer to your phone system and license your copy of SmartServer so that it can accept client connections.
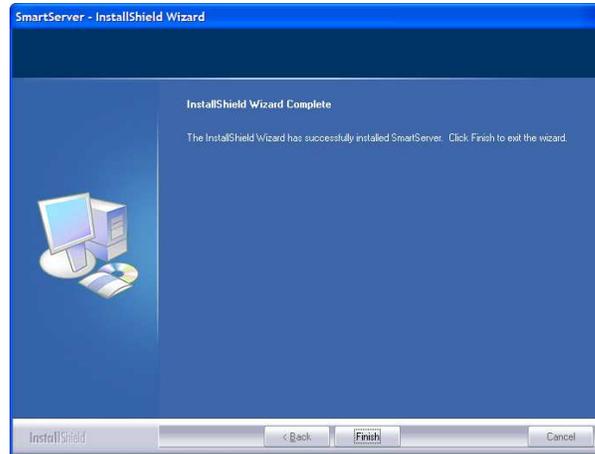
Please review the next section of this document for information on the Post-Installation Wizard.

Uninstallation

If you ever wish to uninstall SmartServer, make sure SmartServer is not running, double-click the **My Computer** icon on your desktop, double-click **Control Panel**, double-click **Add/Remove Programs**, and in the list that appears, highlight **SmartServer** and click **Add/Remove**.
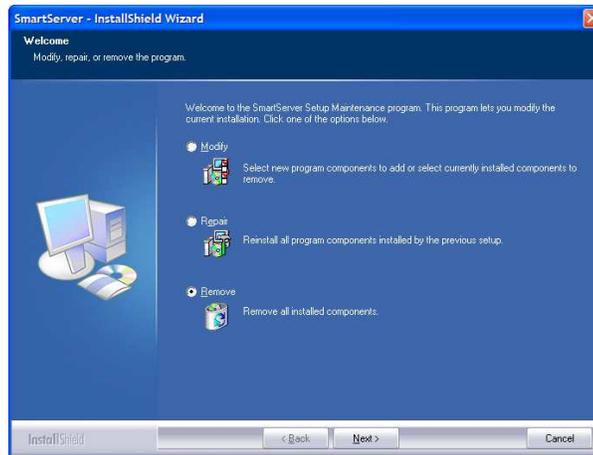
On the SmartServer Maintenance screen, select **Remove** and click **Next**. When SmartServer has been uninstalled from your computer, click **Finish**.

Section Three

Post-Installation Wizard

Post-Installation Wizard

The Post-Installation Wizard makes it easy for you to connect SmartServer to your phone system and to license your SmartServer. The Wizard is run automatically after you first install SmartServer, but it can be ran again any time any major configuration changes need to be made by going to the SmartServer program group on the Start menu and selecting Post-Install Wizard. In general however, the Wizard will only ever be run once.

When the Wizard is run, if SmartServer is currently running it will be stopped.

License Agreement

The first time the Wizard is run on a computer, the SmartServer End User License Agreement (EULA) will be displayed. You must check the **I accept the terms of the license agreement** tick-box to continue.
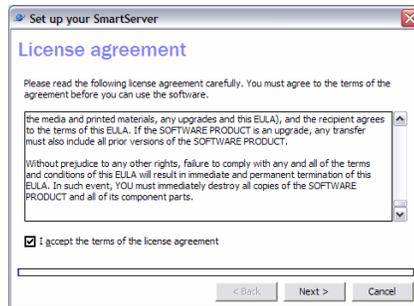
Once you have agreed to the EULA, you will not see this screen on subsequent runs of the Wizard.

Retrieve Your License Details

The first thing you need to do when using the Wizard is to tell it your Serial Number. This eight-character code will have been given to you when you obtained the software. It is used to enable SmartServer to be licensed so that it can accept client connections and connect to your phone system, and to provide you with technical support should you need it.

The Wizard will connect to the Oak Telecom licensing website on the Internet to obtain your license, so you will need to make sure that the SmartServer PC has a working Internet connection and that if you have a firewall turned on, it has been configured to allow the Wizard to access the Internet on port 80. For more information on configuring your firewall, please consult with the third party vendor of your firewall solution.
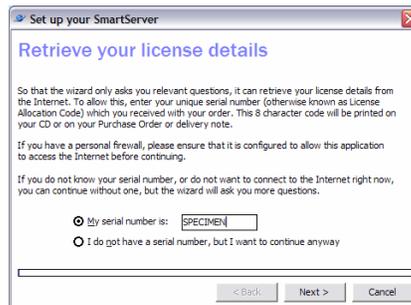
There are a number of scenarios where you may not wish to enter your Serial Number at this point:
- you have already run the Wizard once and so do not need to have SmartServer licensed again
- the SmartServer PC has no Internet connection
- you do not want to license SmartServer at this time (if you want to make use of the 30 day 10 user trial period)

If one of the above scenarios apply to you, just select **I do not have a serial number, but I want to continue anyway**.

Click **Next** to continue.

Select Your Phone System

The next screen of the Wizard is used to select the type of phone system (or PBX) you have that SmartServer will connect to.

When you select from the PBX list, you will see a message if your computer does not appear to have the right drivers installed for connection to the PBX.
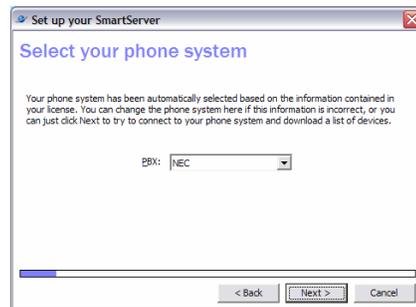
If you will be connecting SmartServer to a Definity, InterTel, Nortel, Siemens, Telrad, or Toshiba phone system, you will need to enter some more settings on the next one or two pages of the Wizard.

For instance you may need to select whether to connect to the phone system using an Ethernet connection or using a serial cable.

If required you will also be asked to enter the password to use when connecting to your PBX.

If you are connecting to a phone system using a serial cable, the Wizard can attempt to find the COM port and baud rate to use for you.

The Wizard will then connect to your phone system and try to download a list of devices that can be monitored by SmartServer. Some PBXs do not allow the Wizard to download a list of devices, and so all devices must be entered manually. This is done on the next screen.

Add Devices to SmartServer

This screen shows you a list of the extensions, agents, groups, and trunk lines from your phone system that SmartServer will monitor.


You can remove devices that you do not want SmartServer to monitor by highlighting them and clicking **Remove**, or you can add devices or a range of devices by entering the required information and clicking the **Add** button.

Select Town and Country

The Wizard will detect which country and town you are in by reading the settings stored in your Windows operating system's Telephony Dialing Rules. If the information is not present or incorrect, or SmartServer will have different settings, you can choose them here.

When you select a country from the drop down, the list of area codes will update to show the area codes that are valid in that country.
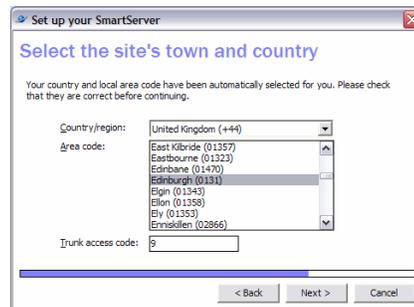
Also on this screen of the Wizard you need to enter your primary trunk access code (usually 9 in the United Kingdom).

Run as an Application or a Service

The Wizard now gives you the option to run SmartServer as an application or a service. The setting you choose will affect what shortcuts are shown in your Start menu and how SmartServer will behave.

If you do decide to install SmartServer as a service, you can choose a user to run the service as. You can use one of the special accounts (**LocalSystem**, **LocalService**, or **NetworkService**) or enter another account's details for example **DOMAIN\User**. If you choose one of the special accounts, you do not need to enter a password.

If you leave the service username as the default (**LocalSystem**) then SmartServer will be able to display a user interface which is useful for checking that everything is working, however you may have problems when you come to setting up Address Books whose source data is stored on network shares with strict permissions.
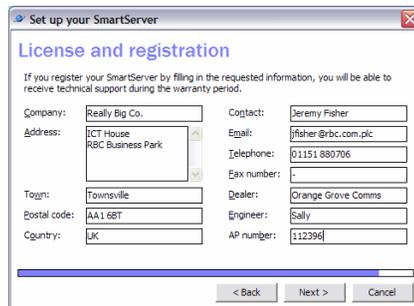
Even after the service has been installed, you can change the username that it runs under by going to the **Services** control panel (this is found in different places on different versions of Windows. You can find specific instructions on how to open the services configuration applet by searching Help for "services"). Find the SmartServer service and open its **Properties** window, then go to the **Logon** or **Run As** tab and change the username accordingly.

When SmartServer is running as a service, an icon will be in your Start menu, under **Programs**>**SmartServer** called **SmartServer Service Helper**. When you run this program, an icon will appear in your system tray (also known as notification area). The icon will usually be a gear with a green "play" symbol over it to show that the SmartServer service is running. If the gear has a red "stop" symbol over it, it means the SmartServer service is not running. If the gear has an "x" symbol it means that the SmartServer service could not be found – perhaps because the user you are logged on to Windows as does not have sufficient privileges.

You can use the SmartServer Service Helper icon to start and stop the SmartServer service, or to show and hide the SmartServer User Interface (but only when the SmartServer service is running as LocalSystem).

License and Registration

If you entered a Serial Number on the first page and successfully retrieved your license details from the Internet, you will be asked for registration information on the next page. You must enter this information in order to retrieve technical support. If you have already completed the Wizard once, this information may be filled in already.

Your details will be submitted to the Oak Telecom Licensing website and the Wizard will receive information enabling it to license SmartServer for the features that you have purchased.

After licensing is complete, the Wizard will ask if you want to SmartServer. If the Wizard is being run after installation and some files were copied which were in use during installation, you will be prompted to let the Wizard restart your computer so that these files can be installed properly.

Manual Licensing

If there is a problem when the Wizard tries to license your SmartServer, you can license SmartServer manually. Just before the Wizard finishes, the manual licensing screen will be shown.

From here you can see the Serial Number you entered on the first page and the Hardware Code which is unique to your computer. You can obtain 16 character Authorization Codes to license your SmartServer with using the www.smartphonecti.com/licensing website, or by calling Oak Telecom.

Enter the Authorization Codes one at a time and the licenses will be validated and the relevant features of SmartServer will be unlocked.

Oak Telecom may refuse to give out an Authorization Code if they believe a certified SmartServer Engineer did not install the software, or if the installer does not have a valid Serial Number.

It is very important to remember that the Hardware Code of SmartServer is based upon the hardware that is in your machine. If you change the hardware in your SmartServer machine, the Hardware Code could change leaving you without licenses. Therefore to prevent any down-time you should always consult Oak Telecom before making any changes to the hardware that SmartServer runs on.

Free Trial Period

SmartServer comes with a 30-day / 10-client free trial period so that you can test it and so that you can decide how many licenses you need to purchase. During this period you are not required to buy a license, however, after this 30-day period has ended, if you wish to keep using SmartServer, you are obliged by law to purchase a license. In fact, after the trial period is over, SmartServer may no longer work until you obtain a license. Licenses can be obtained from Oak Telecom or your dealer.

Section Four

Configuration
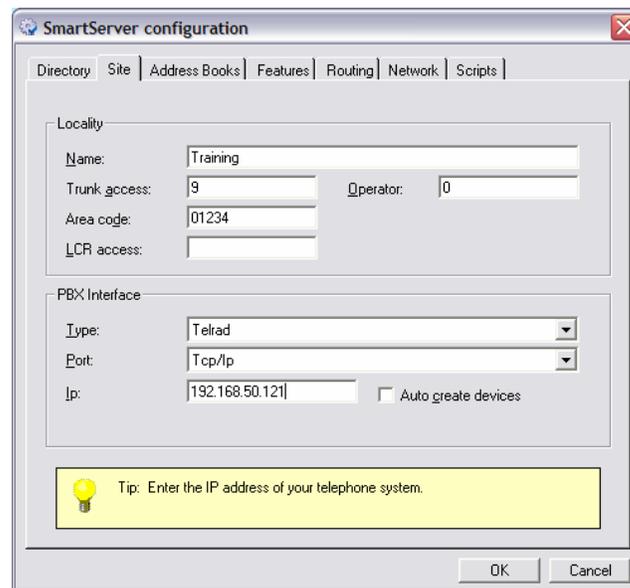
SmartServer Configuration Guide

This section of the document describes how to use the SmartServer Configuration program (also called SSConfig) to set up SmartServer to work with your telephone switch and computer network.

You do not need to run SmartServer Configuration from the SmartServer computer; it may be run across your local area network. However SmartServer must be running whenever you try to use SmartServer Configuration, and if you want to set up an address book, you should do it using SmartServer Configuration on the SmartServer PC.

Also, if you try to run SmartServer Configuration over the network from a remote computer, you will be required to enter the details of a SmartPhone user who has the Administrator privilege enabled (see later in the document).

The Site tab

The site tab contains settings that were set up for you when you ran the Post Installation Wizard, so you don't normally need to change these settings, other than to keep the comma-separated list of **LCR access** codes up to date.


You can also enter the extension number or group number of the operator/reception desk in **Operator**. This is just informational and is not used by the software.

Setting up Extensions, Trunks, and Agents

In order for SmartServer to know who is on the phone to whom, you must tell it to monitor all the extensions you have on your PBX.

This was done for you by the Post Installation Wizard. However you may want to add more devices from time to time. To do this, click the **Add** button on the **Directory** tab. On the **Extension Properties** window that appears, choose what sort of device you are adding (**Trunk, Extension**, **Agent**, or **Speed Dial**).
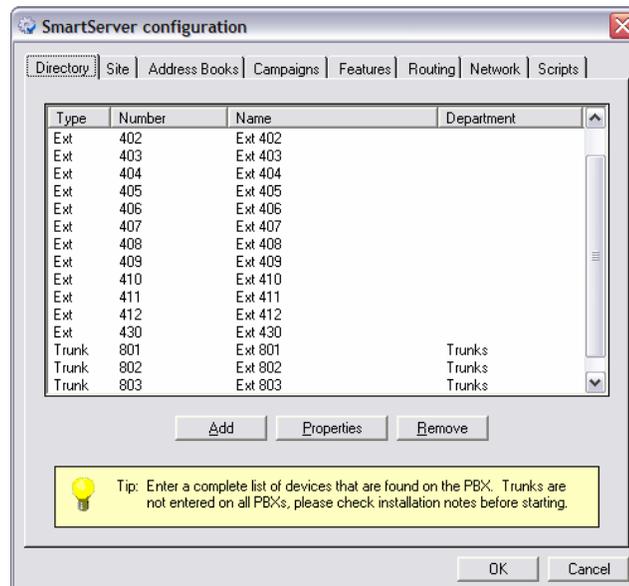
Enter the number in the **Number** box, the name in the **Name** box, and the department name to store this device under in the **Department** box.

If you are adding a trunk or speed dial, no further information is required, although on the **Notes** tab you can add an **Administrative note** if you wish. This note can be used for any general purpose such as to remind the administrator of important information pertaining to the trunk.

A speed dial is like a short-cut to a telephone number. Speed dials are displayed on the Extension Status window of the SmartPhone and SmartConnect client software. They should not be confused with Personal Speed Dials which are configured using the client software and are not displayed on the Extension Status window.

For trunks, you can also choose to tick **Do not monitor** (any trunks you enter are monitored by default) and **Display on Extension Status** (trunks are not usually displayed on the Extension Status window of client software).

If you are adding an extension, you need to enter more information, as described below.

- If you wish, choose a password for this extension (which the user will need to log in to SmartPhone and other applications) and enter it in the **Password** box. Users with elevated privileges, such as administrators that can view other extension's Call Histories should always use a password.
- In the **Assistant** box, you may enter the extension number of the extension's assistant.
- Enter the extension's cellular telephone number in the **Mobile no** box.
- In the **DDI number** box, enter the DDI telephone number for the extension (this is the number that people would dial if they wished to speak to this extension directly, as presented by the telephone system).
- On the **Security** tab, select the security settings that are appropriate for this extension (used in SmartPhone, SmartConnect, and other applications). Security settings are described below.
- On the **Advanced** tab, set any advanced features of this extension as appropriate. Advanced features are described below.
- On the **Address Books** tab, you can configure the address books to be used by this extension. See the Address Books section below for more information.
- On the **Buttons** tab, configure the buttons to display on the SmartPhone **Phone** window (for more information, see later in this document).
- On the **Events** tab, select any scripts to run when different events are fired (for more information, see later in this document).
- Lastly, on the **Notes** tab, you can edit the user's absence text which is used whenever the extension is unavailable e.g. out to lunch. You can also create an administrative note for the extension. This note could be used to remind administrators where the extension is located, or to store any other trivial information.

If you are adding an Agent, you will be asked to fill in the same information as for an extension.

Click the **OK** button. The information you entered will disappear, but the **Extension Properties** window will not close. This is so that you can add more extensions without having to click **Add** each time. When you have finished adding all the extensions and trunks, click **Cancel**. The extension(s) (and trunks) that you have added will appear in the list on the **Directory** tab.

If you ever need to remove any extensions, highlight the ones you wish to remove and click **Remove**. They will be deleted from the Directory list.

If you made a mistake when entering details, or wish to change the details of any extensions, highlight the extension(s) that need(s) changing and click **Properties**. Any changes you make on the **Extension Properties** screen will affect all of the selected extensions.

For instance, you might highlight many extensions, click **Properties**, and then change the department name to **Sales**. This will make all the extensions you highlighted have **Sales** as their department name.

If you are editing the properties of more than one extension at the same time, the title of the **Extension Properties** window will change from **Extension Properties: <extension number>** to **Extension Properties: (<n> exts)** where **<extension number>** is the number of the single extension you are editing, and **<n>** is the total number of extensions that are being edited at the same time.

Security Settings

Listed below are the selectable security settings as displayed on the **Security** tab of SmartServer Configuration's **Extension Properties** window. Unless otherwise stated, the security features below are set to off by default for newly created extensions.
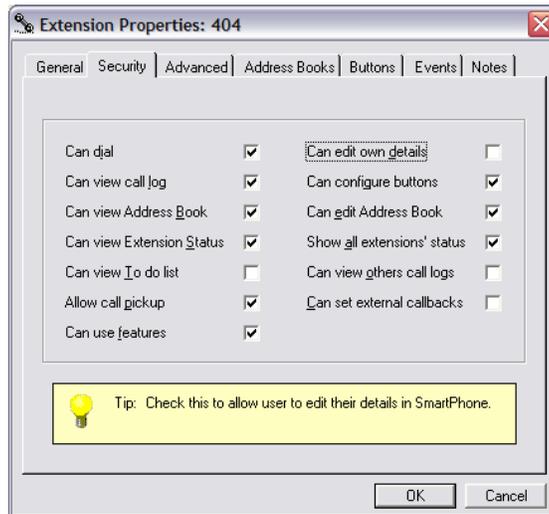
Can dial – if ticked, the selected extensions are able to make phone calls from SmartPhone and other applications. This feature is on by default.

Can view call log – if ticked, the selected extensions are able to view their own **Call History** screen in SmartPhone and SmartOperator. This feature is on by default.

Can view Address Book – enables the users to view the **Address Book** screen in SmartPhone. This feature is on by default.

Can view Extension Status – this feature enables the selected users to view the **Extension Status** screen in SmartPhone. This feature is on by default.

Can view To do list – tick this to enable users to view the **To do list** in SmartPhone. It also enables text messages to be sent and received by the user.

Allow call pickup – when ticked, the selected extensions can directly answer other user's calls by clicking on **Pickup** from the **Extension Status** screen.

Can use features – lets the selected users view the **Feature** menu in SmartPhone. This menu enables users to quickly turn on telephone system features on their handsets - such as Do Not Disturb - without needing to remember and enter feature codes.

Can edit own details – turn off to prevent users from editing their name, department, and password. This feature is on by default.

Can configure buttons – when ticked, the selected users can edit the buttons that appear on their **Phone** window in SmartPhone.

Can edit Address Book – if ticked, the selected extensions are able to edit records in, add records to, and remove records from the internal SmartPhone Directory.

Show all extensions' status – enables the selected users to view (on SmartPhone's **Extension Status** window) the status of all extensions in the company – not just the ones in their department.

Can view others call logs – when this is ticked, the selected extensions can view the **Call History** screens of other extensions. This feature also enables the selected extensions to view the **Call History** screens of contacts in your address books.

Can set external callbacks – ticking this enables the users to set External Callbacks on contacts and to view the External Callbacks other SmartPhone users have set.

Advanced Settings

The following settings are available from the **Advanced** tab of the **Extension Properties** window. They are all off by default for new extensions:

Exclude from extension status – prevents the selected extensions from being displayed on **Extension Status** screens. You would typically use this setting on fax, modem, group numbers, and other extensions being monitored by SmartServer but that it's not useful to display the status of.

Ignore answer messages – extensions that have this setting enabled will not be included when analyzing missed calls etc for statistical purposes.

Used as a main number – this is used so that SmartServer can count the number of calls to main numbers in an organization and display the statistics on SmartServer's **External Calls** tab.

Use name from PBX – when ticked, this makes SmartServer attempt to learn the name of the extension as it is entered on the PBX. This is only supported by some PBX types.

Keep call details private – turn on to keep the selected extensions' call details private. This means the caller/called name and number will not be shown on the **Extension Status**. This would be ticked for extensions that make sensitive or confidential calls.

Do not monitor – stops SmartServer from monitoring the selected extensions.

Administrator – turn this on for users who are allowed to use SmartServer Configuration to configure the system. If no extensions are set up in the directory as Administrators, you will only be able to administer SmartServer from the SmartServer machine.

Address Books

Each user has configuration options for the public address books that have been set up as well as the option of having private address books that only they can use. For instance, there might be a global customer contacts database set up for every SmartConnect user to be able to know who is calling, but a salesman might have their own database of contacts which they want to keep hidden from other SmartConnect users. Using the **Address Books** tab of the **Extension Properties** dialog makes this possible.
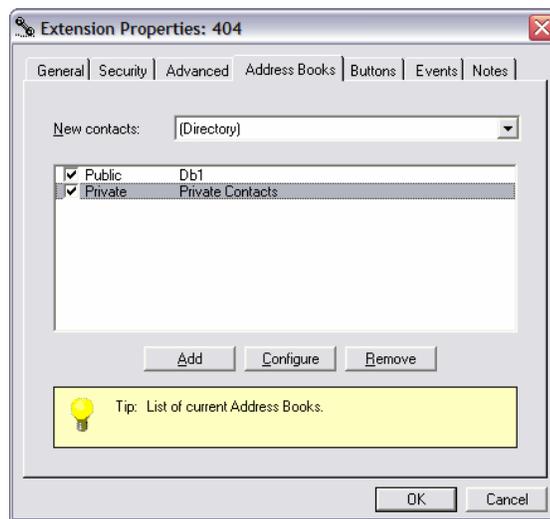
The first option is where SmartServer should create new contacts when the user selects to add a new contact. They can either be added to the internal SmartServer directory (default) or any of the public or private address books that have been set up. Just select the address book to use from the **New contacts** dropdown list.

Next, there is a list showing all the public and private address books that have been set up. The word **Private** or **Public** will distinguish the different address book types in the list. Put a tick next to all the address books that the user is allowed to use.

To add a private address book, click the **Add** button. Select the type of address book to add from the **Type** dropdown list, click **Configure** to perform type-specific configuration (for more information see the **SmartServer Address Book Plugins** section of this document). Click **OK**. To remove a private address book, highlight it and click **Remove**.

Buttons

Buttons are used by SmartPhone's **Phone** window to enable users to have quick access to certain commands, such as viewing the **Extension Status** window. Each user can have their own set of 0, 4, or 8 buttons at the bottom of their **Phone** window. Each user can be given the option of editing their own buttons by using the SmartPhone client software, or system administrators can edit user's buttons by using SmartServer Configuration.

To set up an extension's buttons, double-click the extension in the directory, and then click the **Buttons** tab of the **Extension Properties** window that appears. Now, select a number of buttons from the drop-down list.

Finally, highlight each button in turn from the grid and click **Edit** to choose what the button should do.

When you click **Edit**, the **Edit Button** window will appear. From here, select the sort of button from the **Type** drop-down list, enter a name for the button in the **Display** box, and then enter any other required information before clicking **OK** to save the button.

Most of the buttons are context-sensitive, that is, they will only be enabled or "click-able" when the user's telephone is in the right state (e.g. you won't be able to use the **Answer** button unless your phone is ringing). For a current list of buttons that are available, along with their descriptions, please review the relevant section in the document: *Getting More Out Of SmartPhone*.

To save the settings of the buttons, click **OK** on the **Extension Properties** window.

Events

In SmartPhone, certain scripts and Plugin actions can be set to run when certain things happen. To set up these events, use the **Events** tab of the **Extension Properties** window.
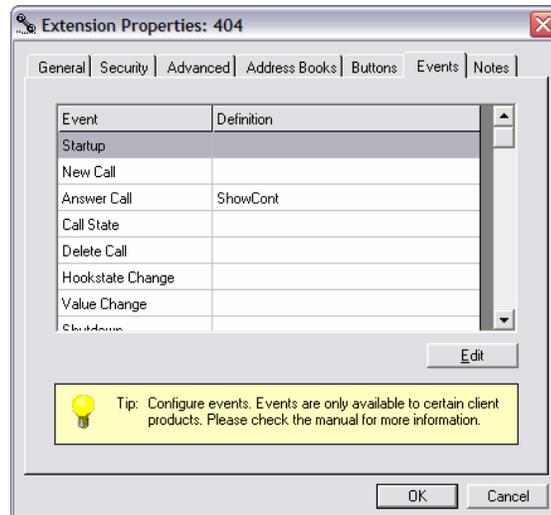
The list of events that you can set scripts/actions to execute on are:
- **Startup** – fired just before SmartPhone finishes loading.
- **New Call** – fired when a new call is started – either inbound or outbound.
- **Answer Call** – fired whenever a call is answered.
- **Call State** – fired whenever the call's state changes (e.g. from held to connected).
- **Delete Call** – fired every time a call ends.
- **Hookstate Change** – fired every time the local extension's state changes (e.g. goes off hook, starts ringing, or goes on hook).
- **Value Change** – fired whenever the value of one of the call attributes changes – custom attributes can be assigned to calls using the **Set Result** button type.
- **Shutdown** – this event is fired just before SmartPhone is unloaded.

To change what happens on one of the above events, highlight the event in the grid and click the **Edit** button. Then, from the **Edit Event** window, select the script or action that you want executed from the **Type** drop-down list. Finally, click **OK** on the **Edit Event** window to save the new event.

Configuring Agents

When you create an agent, you enter an id for the agent in the **Number** box. This does not have to be a number, however it cannot be more than 6 characters long and it should be unique. We recommend using the format **AG<xxx>**, where <xxx> is a unique integer, which could range from 000 to 999.

When an agent logs in, they must enter their ID with the same case as is in SmartServer Configuration.

On the **Campaigns** tab of the properties window is a list of all the campaigns that have been assigned to the selected agent. Any campaign might have the word **(Done)** next to it, indicating that the campaign has been completed. Campaigns will be worked through in the order in which they are assigned to agents.
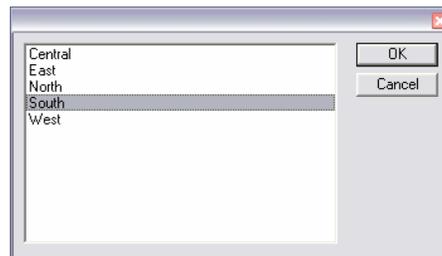

To assign a new campaign for the agent, click the **Add** button. A window (see above) will appear listing all the campaigns that have been added to SmartServer. Highlight one of them and click the **OK** button to add the campaign to the bottom of the list.

To remove a campaign (for instance one that has been completed), highlight it from the list and click **Remove**.

Setting up Address Books

If you already have databases with your customers and contacts in that you want SmartServer to search when matching incoming telephone numbers to names, you need to add them to SmartServer Configuration. To do this, click the **Address Books** tab and click **Add**. The **Public Address Book** window will open.
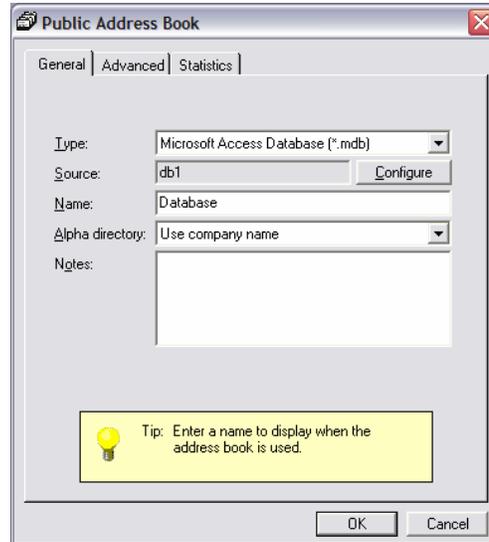
NB You should only add public address books from the SmartServer computer.

On this window, choose the type of database to connect to from the **Type** drop-down list. The types of address book available to you will depend on the type of licenses you have obtained. Click the **Configure** button to do database-specific configuration of the address book. For more information on doing specific configuration of each Address Book type, see below.

The basic configuration of all address book types is the same, you enter a **Name** for the address book which is displayed in SmartPhone, you select whether the address book should be indexed by company name, contact name, or none from the **Alpha directory** drop-down, and you can optionally enter some **Notes** about the address book.

Once you have done the basic configuration, click onto the **Advanced** tab to select whether to use the data source live or cached. Live use is recommended in most situations. Tick the **Use data live** checkbox to enable this, or tick **Cache data** to download the data on a schedule you specify.

If you are using data live, you can tell SmartServer to disconnect from the data source between certain times of the day, for example so the database can be backed up. To do this, enter the hour to disconnect in the first textbox and then hour to reconnect in the second textbox.

If you are using data cached, you need to tell SmartServer when to cache the data. Click **Refresh cache at** and enter a time in the upper textbox to make SmartServer download the data at the same time every day (it is recommended you enter a time like 3am when the system will not be busy). Alternatively, click **Refresh cache every**, and enter a number of hours to make SmartServer download the data every time the specified number of hours elapses.

If you wish to use a cached data source that is only refreshed when you click the **Refresh now** button, select **Refresh cache every** and enter **0** in the textbox. You can click the **Refresh now** button to force a download of data at any time.

The **Statistics** tab just shows some information about the last 5 searches so you can see if the address book is working or not, and how fast it takes to search.

The following types of address book can be set up:
- **GoldMine Contacts (*.dbf; SQL)** - The contacts from a GoldMine database
- **Maximizer Contacts** - The contacts from Maximizer
- **Microsoft Access Database (*.mdb)** - Link to an Access database
- **Microsoft Outlook/Exchange** – Uses Outlook Contacts, or Exchange Public Contacts
- **Microsoft CRM** – Uses contacts from Microsoft CRM
- **Custom Data Source** - Connects to any ODBC data source
- **Remote Address Book** - Connects to another SmartServer to use it as the source of data
- **ACT! (*.dbf)** – The contacts and companies from ACT! version 6 or below

- **ACT! Professional** – The contacts and companies from ACT! version 7 (or 2005) and 8
- **Lotus Notes** – Connects to a Lotus Notes data file
- **Pegasus Opera II** – Works with Opera II Suppliers and Customers
- **SuperOffice CRM Version 5** – Connects to SuperOffice CRM 5 contacts and companies

For information on performing address book type-specific configuration, see the separate sections at the end of this document.

Once you have created a public address book, you can configure the SmartPhone user-specific settings for that address book by going to the **Directory** tab, going to the user's properties dialog and then going to the **Address Books** tab. For more information, see the User Configuration section of this document.

Campaigns

If you have purchased any SmartCampaign licenses, the **Campaigns** tab will be visible in SmartServer Configuration. This tab enables you to create, edit, and remove campaigns for use in SmartCampaign. Once you have created a campaign, you can assign it to agents. For more information on agents, see the section above - headed Setting up Agents.

To create a campaign, you first need to make sure you have a number of things:
- A script of words that agents will say to callers. A script may contain many levels of dialogue, normally starting with a short introduction and question by the agent.
- A fixed set of results. A call should always end with a known result, such as "call back later," "appointment booked," "not interested," etc.
- A number of HTML files containing the words that agents will say. (Oak Telecom can create these for you if needed.)
- Lists of telephone numbers of the people you wish to dial.

For further information and help with designing scripts for a campaign, contact Oak Telecom.

To create a new campaign, click the **Add** button. The **Campaign** window will appear. Make sure you are on the **General** tab, and fill in the information described below...

Next to the **Source** box, there is a button with an ellipsis on it. Click this button to select the database that contains the telephone numbers for this new campaign. The database must be in Microsoft Access format. Oak Telecom can help you get telephone numbers into a Microsoft Access database from sources such as UK-Info Disk or other computerized telephone directories.

Once you have selected the database, select the table or query where the required telephone numbers can be found by selecting it from the **Table/query** dropdown list.

In the **Campaign name** box, enter a display name for the campaign. This value defaults to the same name as the table or query selected in the **Table/query** list.

From the **Id** dropdown list, select the field that contains the unique identifier for records in the selected table or query. This field should be uniquely indexed. From the **Telephone** dropdown list, select the field from the selected table or query that contains the telephone number to be dialed. This field should be unique in each record. From the **Name** dropdown list, select the field that contains the name of the person being called. The Name field does not need to be unique.

In the **No answer timeout** box, you may enter the maximum number of seconds that SmartCampaign should wait for a call to be answered before giving up and dialing another number. If you leave this field blank, SmartCampaign will not hang up an unanswered call until the user tells it to.

Setting up Scripts for a Campaign

On the **Scripts** tab is a "tree" showing the scripts and options that have been set up for the campaign. Every campaign starts with one **Initial script** in the tree.

To select the HTML file that contains the text to be spoken for each script, highlight the script in the tree and click **Properties**. Enter the path to the HTML file in the **HTML file** box. As you type, a preview of the HTML file will be displayed in the **HTML Preview** area.
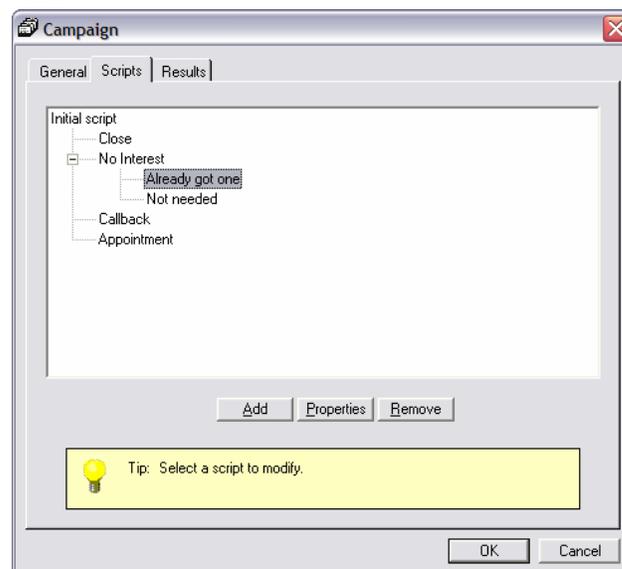
Each script will normally have a number of outcomes that will lead to another script being read. To add choices to the end of a parent script, highlight the parent script and click **Add**. Then select a display name for the choice and enter it in the **Caption** box. Select a color for the choice, either Blue, Green, Red, or Yellow from the **Color** dropdown list, enter a unique name for this choice in the **Tag** box, and select the HTML file that contains the words to be read by the agent when this choice is chosen by typing the file name in the **HTML file** box.

It is possible to add any number of levels of scripts. For instance, after the Initial script, the choices might be Interested and Not Interested. If the agent selects **Interested** and reads the **Interested** script, there might be a number of choices at the end of that script such as **Product A**, **Product B**, **Product C**. Then those scripts might have options at the end of them, and so on. Whenever you add a script by clicking the **Add** button, the script will be added as a child of the highlighted script, and it will appear in SmartCampaign as a choice for agents to click on at the bottom of the highlighted script.

To remove a script, highlight it and click the **Remove** button. You cannot remove the Initial script. To edit the properties of a script, such as the HTML file to be used, highlight the script and click **Properties** (or just double-click the script in the tree).

Call Results

The last thing you need to do when setting up a campaign is to enter into SmartServer Configuration all the possible results that you want to be able to record for each call. When the agent clicks one of the call result buttons, a final HTML file is displayed, and the result of the call is saved in the database.

To add results, go to the **Results** tab and click the **Add** button. Enter a display name for the result in the **Caption** box.

Select a type from the **Type** dropdown list. The four main types are:
Keep – keeps the record in the database so it can be called again at a later date
Not interested – the person was not interested.
**Postpone** – call the person again after a specified period.
Remove – the record needs to be removed from the database (perhaps because the person was abusive).

If you select **Postpone** from the **Type** list, you must enter a period of time after which the person will be called back. Enter a number in the box next to **Delay**, and choose a period from **Minutes**, **Hours**, or **Days**. For example to call a person back after 2 hours because an answer machine answered the call, enter a **2** in the **Delay** box and select **Hours** from the dropdown list.

Give the call result button a color – **Blue**, **Green**, **Red**, or **Yellow** – by selecting the appropriate color from the **Color** dropdown list.

Select the HTML file that should be displayed if this result is chosen and enter the path to the file in the **HTML file** box. A preview of the file will appear in the **HTML Preview** area.

When you have set all the options for your new result, click the **OK** button, or click **Cancel** if you changed your mind and do not want to add/edit the result.
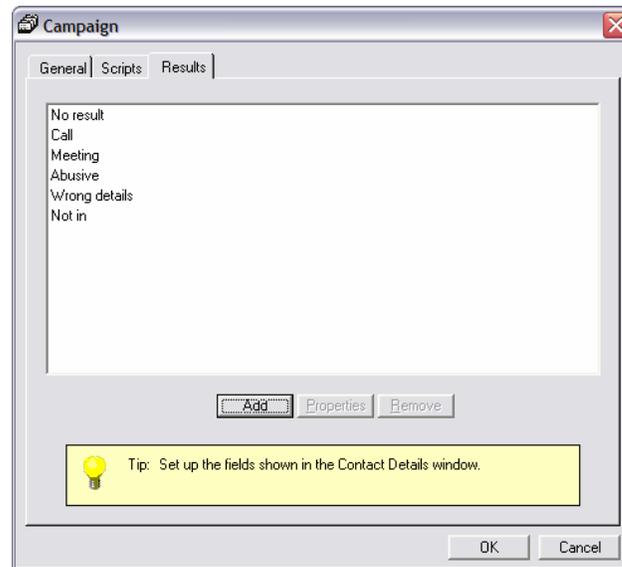
Once you have finished creating your campaign, click the **OK** button on the **Campaign** window. You may now assign the campaign to agents on the **Directory** tab to make them work your new campaign.

Duplicating Campaigns

Usually, Oak Telecom will help you design your first campaigns and set them up for you. Later on, you may want to make another campaign that is only slightly different to the existing ones (for example you might want to phone people from another post code or country).

Rather than having to create a new campaign and set up all the scripts and results again, you can copy a campaign that already exists and just make the relevant changes. To do this, on the **Campaigns** tab of SmartServer Configuration, highlight the campaign you wish to base the new campaign on, and click the **Duplicate** button. The **Campaign** window will appear as if you are editing the campaign you highlighted.

All you need to do is change the **Campaign name** from **<New campaign>** to the name of the new campaign, and make the relevant changes to the other fields, for example change the **Table/query** or the **Source**.

When you click **OK**, the **Campaign** window will close, and the configuration of the new campaign will be saved ready to be assigned to agents.

To remove a campaign that you no longer need, highlight it and click **Remove**.

Telephone System Features

SmartPhone has the ability to remember the feature codes for your telephone system, such as the code to put your telephone into Do Not Disturb mode, or the Forward All Calls code. If you enter the feature codes for your phone system into SmartServer Configuration, SmartPhone users will be able to access the **Feature** menu. From this menu, users can use the features of their telephone by simply clicking on the menu, rather than having to remember the codes they would normally dial.
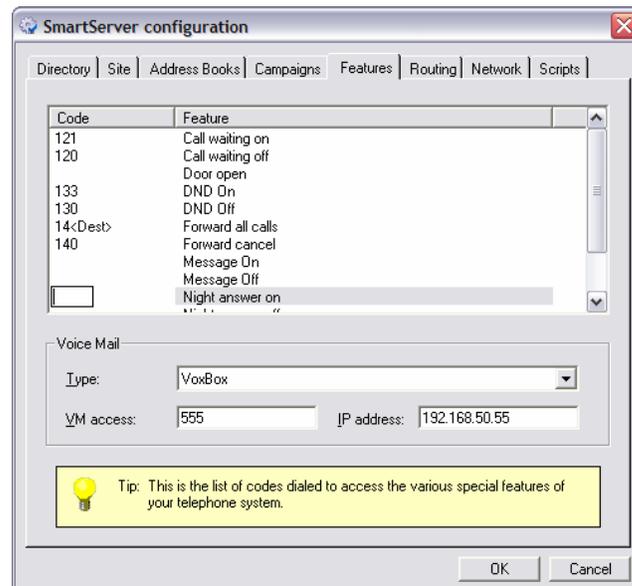
To enter your phone system's feature codes into SmartServer Configuration, go to the **Features** tab and click on whichever items in the list you wish to add the feature codes for.

You can add codes for the following telephone system features:

Call waiting on/off – The beeping that lets you know that you have a call waiting

Door open – To activate the magnetic door release mechanism

DND on/off – The Do Not Disturb mode that makes an extension unavailable when people ring it

Forward all calls/Forward cancel – Forwards all incoming calls to a different telephone

Group pickup – Answers a call that is ringing on somebody else's phone

Hunt group join/leave – Make extension join or leave a specific ringing group

Message On/Off – The light or broken dial tone that indicates a message has been left

Night answer on/off – When in Night Mode, incoming calls usually ring a special extension

Page – Talk to another extension or group directly without first ringing them

Reset all services – Restore telephone system defaults

Set advisory message/off – The "Out Of Office" message that is shown on the caller's display phone

Silent monitor – Listen in on a telephone conversation that another extension is involved in

Suppress caller id on/off – Stops people you call from receiving CLI from your telephone

You can also enter information about your voice mail system into SmartServer Configuration. From the **Type** dropdown list, select the type of voice mail your company uses. Select **(None)** if you do not have a voice mail. Select **VoxBox** if you have it and you can enter the IP address of the VoxBox which will then let users know when they have a voicemail waiting by a little icon in the tray.

In the **VM access** box, enter the number users dial when they wish to access their voice messages.

Automated Call Routing

If you have obtained a Call Routing license from Oak Telecom, the **Routing** tab will be visible in SmartServer Configuration. This tab enables you to build rules that will automatically route calls to another destination. For example, you may wish to route calls from persons in a certain address book to a certain department.

To build a rule, click the **Add** button. The **Routing Condition** dialog appears. In the **Name** box, you must enter a name to give to this rule. The name should be unique.

In the **Caller tel** box, enter a search string to try to match incoming numbers CLI to. You may include the ***** wildcard at the beginning or end of the string. For example, to route all calls from area code 01844, you might enter **01844*** in the **Caller tel** box.

In the **Called tel** box, enter a string to match called telephone numbers to. You may include the ***** wildcard at the beginning or end of the string. For example, if your company has DDI numbers in the range 0207867200 to 0207867399, and you wanted to route any caller that initially rang a number in the range 0207867300 to 0207867399, you could enter **02078683*** in the **Called tel** box.

In the **Ringing ext** box, enter the extension that needs to be actually ringing when you want the rule to activate. You may include wildcards in the string. For example, to route calls that ring 5100, enter **5100** in the **Ringing ext** box. This box is different from the **Called tel** box in that the telephone that is ringing might not correspond to the number that was dialed – the telephone of the number that was dialed might have call forwarding on, or might be unavailable because it is unplugged, so that another telephone is ringing.

You may also select an address book from the **Address book** dropdown list. Use this so that if the contact that is calling your company is found in the selected address book, the rule will route the call elsewhere. For example, if you have two address books, one for Trade Customers and Public Customers, you may want to route Trade to one department and Public to another. Select the blank list item (the first one) to route callers from all address books.

In the **Day** dropdown, you can select which days the rule will be in effect or choose to have it in effect on weekdays or on weekends. If you don't select anything from the **Day** dropdown then the routing rule will be in effect every day.

In the **Date** box, you can enter a comma-separated list of dates which this rule will apply to. For example **1/1/2005, 25/12/2005, 26/12/2005**

In the **Time** box, you can enter the times of day when this rule will be in effect. You can separate multiple time ranges with a comma. For example **09:00-12:30, 13:30-17:00** would mean the rule is in effect during the normal office hours from 9am to 5pm, but not at lunch time.

Finally, in the **Destination** box, you need to enter the new number that calls should be routed to. You can route calls to an external number by entering your trunk access code before the destination number. So to route calls to voice mail, enter the voice mail number in here. Or to route calls to the operator, you might enter **0** in this box.

You can also route calls to a telephone number obtained dynamically from a database. Just enter the name of the field in this box and select the name of the address book from the **Address Book** list. When a caller is found in the address book specified and all the other conditions are met, SmartServer will route the call to whatever telephone number is in the field you entered in **Destination** of the record that the caller was found in.

Once you have finished creating your rule, click **OK** and it will be added to the list. If you wish to modify a previously created rule, highlight it and click the **Properties** button. To remove a rule, click the **Remove** button after highlighting the rule you no longer want.

If you have added more than 1 rule, the **Move up** and **Move down** buttons become visible. These buttons enable you to specify an order in which rules are processed. SmartServer will process the rules in the order in which they are listed on the **Routing** tab of SmartServer Configuration, so you should use the **Move up** and **Move down** buttons to select an order of priority for your rules. Once a call has been routed by one rule, any other rules will not affect it.

In the **Caller tel**, **Called tel**, and **Ringing ext** boxes on the **Routing Condition** window, you may enter multiple numbers separated by commas. So for instance to route calls from the 01480 area code and the 01595 area code, you would enter **01480*,01595*** in the **Caller tel** box.

An asterisk can be used to represent zero or more unspecified characters at the beginning or end of the string. For instance, **144*** would match 144, 1447, 144595, etc and ***200** would match all numbers that end in 200, including 200.

Network Settings

From the **Network** tab of the SmartServer Configuration application, it is possible to make SmartServer do things like send warning messages and reports to administrators, and send updated software to clients automatically.

Sending Warnings

To automatically send fatal warning messages (such as messages that the PBX is not working correctly, or database error messages) to administrators, enter a comma-delimited list of the extension numbers of the administrators that you would like the messages to go to in the **Send fatal warnings to** textbox.

To automatically send non-fatal warnings to extensions (such as backups not working correctly), enter the extensions you want to send the messages to in comma-delimited format into the **Send non fatal warnings to** textbox.

To send daily reports to supervisors, enter the extension numbers of the supervisors that you wish to send reports to in the **Send daily reports to** box.
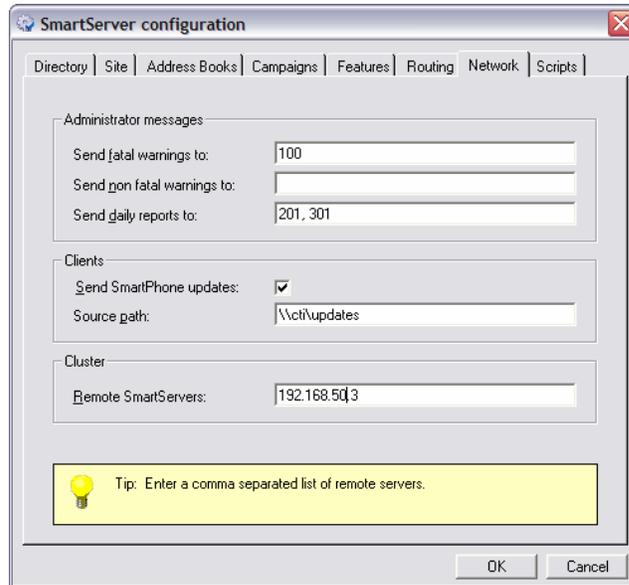
Automatically distributing updates to clients

SmartServer enables new versions of client software to be automatically sent to all SmartPhone or SmartConnect users. To configure this feature, follow the steps below:

There are 3 prerequisites to enabling automatic client software distribution…

- ✓ The client software has been installed on the SmartServer machine.
- ✓ The SmartServer machine has a shared folder or drive that all users have read access to over the network.
- ✓ You have obtained a different version of the client to the version your users are presently running.

If your system meets the above requirements, you may proceed with configuring your system to automatically distribute the updated software. Please remember that the same End User License Agreement that you submitted to when first obtaining the software binds all updates you obtain or use.

SmartServer configuration

Directory | Site | Address Books | Campaigns | Features | Routing | **Network** | Scripts

Administrator messages

Send _f_atal warnings to:	100
Send _n_on fatal warnings to:	
Send _d_aily reports to:	201, 301

Clients

_S_end SmartPhone updates:	☑
Source _p_ath:	\\cti\updates

Cluster

_R_emote SmartServers:	192.168.50.3

💡 Tip: Enter a comma separated list of remote servers.

[OK]   [Cancel]

The following steps are performed on the SmartServer machine:
1. Unload the client software (if it is loaded)
2. Copy the new client software executable to the directory the client software was originally installed to (usually **C:\Program Files\Oak Telecom Ltd\SmartPhone** or **C:\Program Files\Oak Telecom Ltd\SmartConnect**)
3. Load the client software (from the **Start Menu** icon)
4. Make sure the updated file is copied to the share described above
5. Start the SmartServer Configuration utility (from the Start Menu or from SmartServer by selecting **Configure** on the **System** menu)
6. On the **Network** tab, tick **Send SmartPhone updates**
7. In **Source Path**, enter the UNC path name of the shared folder/drive where the updated executable can be found. This path is in the format \\machinename\sharename
8. Click **OK** to exit SmartServer Configuration

When the above steps are complete, the next time users start their client software they will be informed that an update is available, and the new version will be downloaded from the SmartServer machine and installed for them.

Configuring Clusters

If you have purchased a Clustering license for your company, you can install SmartServer on many sites and cluster them together, letting you share extension status and call history information between sites. You can also answer calls that are ringing at remote sites and send messages to remote users.

You must configure SmartServer so that it knows where to find the other SmartServers in the cluster. To do this, enter a comma-separated list of the IP addresses or FQDNs of the remote SmartServer computers.

Scripts

Scripts are used by SmartConnect Enterprise to make things happen when certain events occur at user's extensions. For instance, you could have a script that searches a custom database application for a caller's telephone number and, if found, displays that record on the user's desktop.

Normally, you would get Oak Telecom to write any custom scripts you need in relation to controlling a database application, however, if you want, you can write the script yourself using the VBScript programming language. There are also additional methods available besides the usual VBScript methods. For more information, ask Oak Telecom for the Session COM object documentation.

To add a script to SmartServer, click the **Add** button on the **Scripts** tab of SmartServer Configuration. A new window will appear. In this window, enter the name of the function in the script that you want to run in the **Main function** box. Then, in the large **Script** text box, either key in the code directly, or copy and paste it from another source.

The code must always contain a procedure with the same name as the one in the **Main function** box. Usually you will only have one procedure in the script. However it is possible to have more than one.

When you are finished, click **OK**. The script will be saved and when users log back in to SmartServer, they will be able to use the script.

To view or edit a script, highlight it in the list and click **Properties**.

To delete a script, highlight it and click the **Remove** button.

Section Five

Using SmartServer

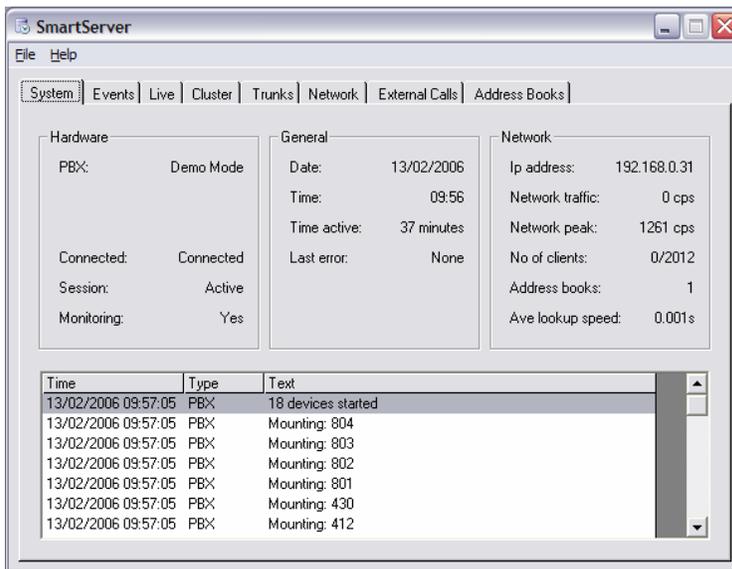# *Using SmartServer*

Terminal Services

When you install SmartServer on an operating system with terminal services such as Windows XP, Windows 2003, or Windows 2000 Terminal Server, you have to be careful about how you run SmartServer.

SmartServer when installed as an application will automatically place a shortcut to its main program file in the All Users Startup program group. This is fine if only 1 user will be logged on to the machine at one time, however if more than 1 user is logged in, SmartServer might try to run twice which could cause problems such as duplicated call history or other unexpected behavior.

If SmartServer detects that it could already be running it will display an error message on startup to inform you.

Information

Using SmartServer, you can gain access to a wealth of information, some of which is also available from SmartPhone and SmartConnect. However, you may find it easier to use SmartServer to view that information. This section will guide you around the eight tabs on the main window of SmartServer explaining to you all the information that is contained within them.

System

The system tab has four areas of information on it:
- **Hardware**: Shows the hardware settings in use by SmartServer.
- **General**: Shows general system information.
- **Network**: Shows basic network information and telephone number lookup speed.
- **Event list**: List of events performed by SmartServer since it started.

Hardware
The type of PBX that SmartServer is connected to is shown next to the **PBX** label. For PBXs that connect via a serial cable, next to the **Serial port** label is the number of the Com port that the PBX is connected to (or TCP/IP). The **Settings** label displays the baud rate, parity checking, data bits, and stop bits settings of the Com port that the PBX is connected to (or the IP address/port number). For TAPI connections, the PBX manufacturer and model is shown next to the **Make** and **Type** labels.

All of these settings can be changed using SmartServer Configuration.

Next to the **Connected** label will be the word **Connected** or the word **No** depending on whether or not SmartServer has managed to establish a connection to the PBX (either via a serial cable, TCP/IP, or TAPI driver). The text next to the **Session** label indicates whether SmartServer is active or not. The text next to the **Monitoring** label will be either **Yes** or **No**, indicating whether SmartServer is monitoring telephone calls or not. If there is a problem with the PBX, these labels will change to reflect this.

General
This area shows: the current date and time (updated every minute) of the SmartServer computer, the estimated amount of time that SmartServer has been running, and the last error message received by SmartServer (if any).

Network
IP address is the IP address of the SmartServer computer.
Network traffic shows the average number of characters per second being sent over the network by SmartServer.
Network peak displays the highest number of characters sent per second since SmartServer was started. Peak traffic is usually observed during system start up.
No of clients is the number of clients that are connected to this SmartServer, followed by the total number of clients that can connect (the total number is the sum of all the different client licenses you have – e.g. if you have 10 SmartConnect licenses, and 50 SmartPhone licenses, the total will be 60).
Address books is the number of address books configured for use by SmartServer in telephone number / name resolution.
Ave lookup speed is the average number of seconds it took to resolve the last 5 telephone numbers into contacts. This should always be below 0.5s. If it is not, users may notice a delay between their phone ringing and the client software showing the call.

Event list
The grid in the bottom half of the window is used primarily for informational purposes. It logs when events and warnings/errors happen. The sorts of events you can expect to see are **System restarted**, **Configure**, **Loaded** <n> **extensions**, **Loaded Address book:** <name>, etc.

Events

The **Events** tab has on it a list of events that have happened since the system started. Events are the things that SmartServer sends to the PBX and the PBX sends to SmartServer.
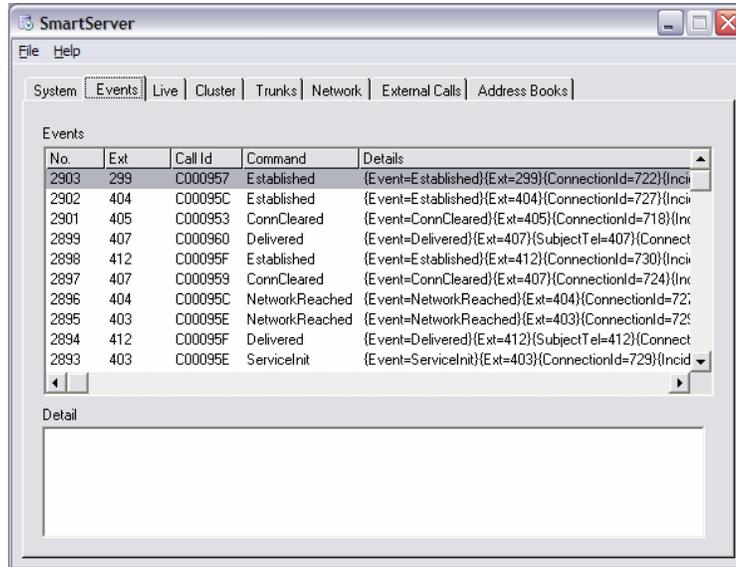
For instance, if extension number 100 lifted their telephone handset, the PBX would send an event to SmartServer telling it that extension 100 has just gone off hook. Then, the event would get a unique ID number and be displayed at the top of the list. The **Events** tab is used so that system administrators can see in detail what is happening.

Live

The **Live** tab has two grids on it – **Calls in progress** and **Extensions**.
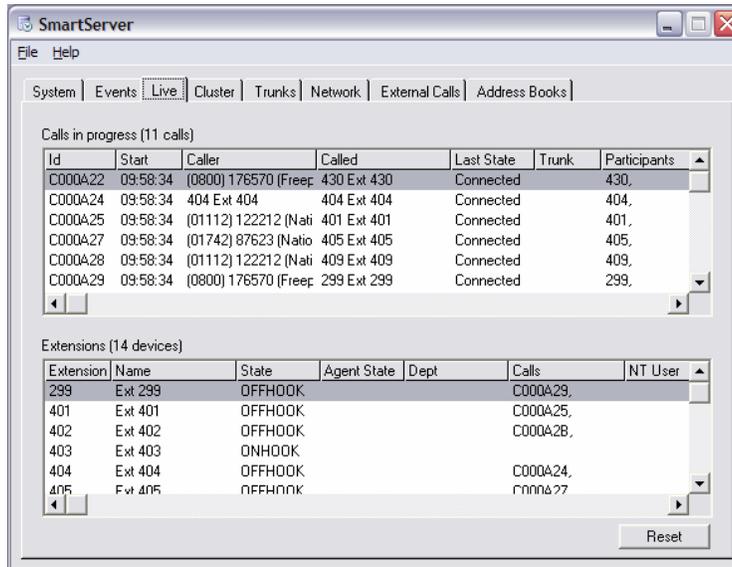
The **Calls in progress** grid lists all the current calls SmartServer is monitoring. It displays the call ID, the start time, the caller number, the called number, the last known state of the call (e.g. Held, Dialtone, Ringing, Connected, etc) and a list of the other extensions that are currently participating in the call. Double-clicking on one of the calls in the **Calls in progress** grid brings up a window detailing the history of that call, the internal representation of the call, and the raw data received from the PBX for the call (as applicable).

The **Extensions** grid lists all the extensions that are in the directory. It shows their name, their department, their state (**OFFHOOK**, **ONHOOK** or **RINGING**), which SmartServer client software the extension is using (if any), and the ID numbers of the calls that they are currently participating in.

The **Reset** button at the bottom of the screen should only be used as directed by Oak Telecom support personnel.

Cluster

The **Cluster** tab will only be visible if you have Clustering enabled on your system (which is normally if you have more than one PBX on your site, or if you have two separate sites linked together).

On the **Cluster** tab is a list of all the extensions that all the other SmartServers are monitoring. The list includes the extension's number, name, department, and state.

Trunks

The **Trunks** tab will only be visible if you are connecting to a non-TAPI switch and are monitoring at least one trunk. It has on it a chart, some trunk usage statistics, and a **Trunks** grid.

The chart is updated every minute, and information about how many trunks were used in that minute is shown. The chart shows the minimum and maximum number of trunks that were in use. The maximum number is the top of the red line. The minimum number is the bottom of the red line. So if the red line starts at 1.0 and ends at 5.0, in the last minute there was always at least one trunk being used, and at one point there were five trunks being used.

The statistics to the right of the chart show the minimum and maximum trunk usage in the last minute and hour and for the whole of yesterday. It splits the data up into trunks used for inbound calls and trunks used for outbound calls.

The **Trunks** grid lists all the trunks installed on your system. It also shows the
name and state of each trunk, and the call ID associated with the trunk.
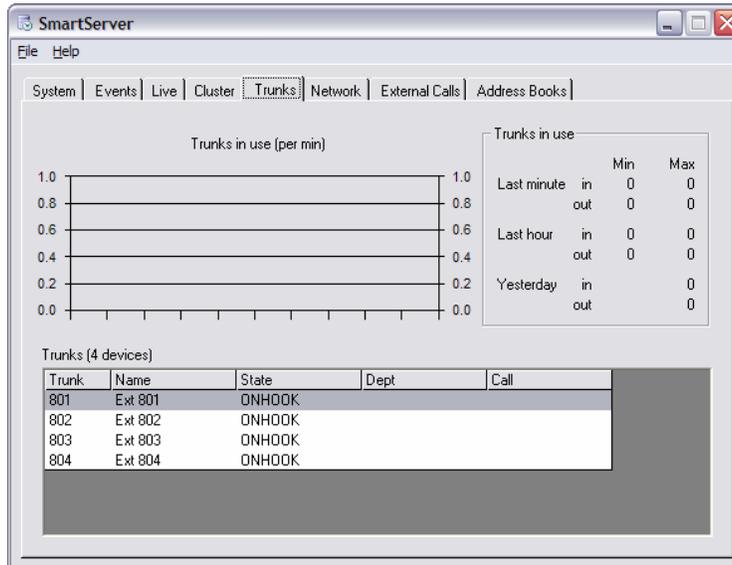
Network

This tab shows a list of messages being sent to SmartPhone clients and a list of users who are logged in to SmartPhone.

The **Messages** grid shows which extension each message was sent to, the subject of the messages, along with the messages themselves. You can use this grid to help you understand how SmartServer communicates with SmartPhone.

The **Clients** grid lists all the computers that are logged in to SmartServer. It shows their IP address, the application they are using to log in (e.g. SmartPhone), the extension number they are logged in as, the name of the extension number they are logged in as and their status.
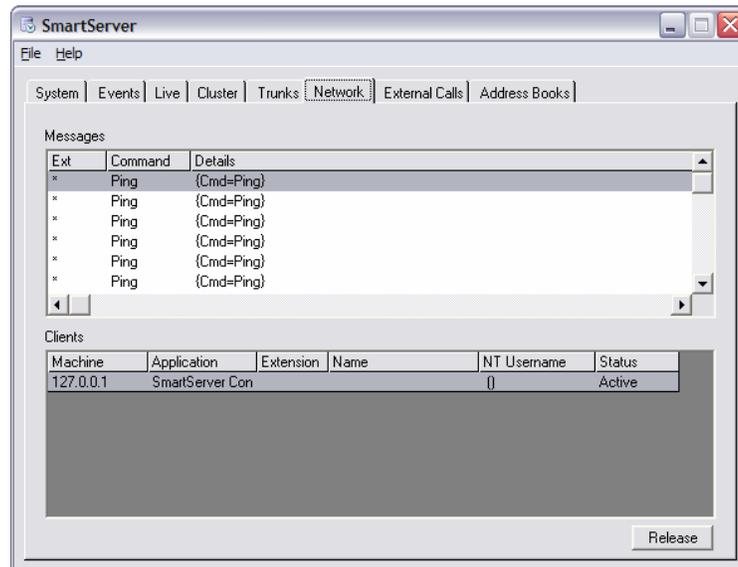
On the bottom of the **Network** tab is a **Release** button. Highlight one of the clients in the **Clients** grid and click **Release** to disconnect that user from SmartServer.

External Calls

The **External Calls** tab has three areas: **Incoming calls (today)**, **Outgoing calls (today)**, and **Missed calls**.

The **Incoming calls (today)** area shows total answered and missed calls to main numbers, and total answered and missed calls to other numbers since midnight.

The **Outgoing calls (today)** area shows the totals of Local, National, Mobile, and Other calls made since midnight. Local calls are identified as calls to the same area code as the one entered in SmartServer Configuration, or calls made without an area code.

The **Missed calls** grid lists all of the external inbound calls that ended before they were answered since SmartServer was started. The grid shows the date/time of the call, the caller's number, the called extension number, and the duration of the call (how long it rang before the caller hung up).

Address Books

The **Address Books** tab has two grids on it. The **Address Books** grid lists all the address books that SmartServer is set up to work with, along with their status (Offline, Updated, Importing, Active, Inactive), hit rate – the percentage of incoming/outgoing telephone numbers that were found in that address book, and the average speed of the last 5 searches.

The **Unknown callers** grid lists all the telephone numbers that rang your company, but could not be found in any address book. The grid shows the date/time of the call, the telephone number, the originating town, the type of call (to/from/missed), and the called/calling extension.

If you have an Imported data source as an address book, you may highlight it and click the **Resync** button. This will immediately re-import the data into the address book. You may want to do this when you have just set up a new imported address book.
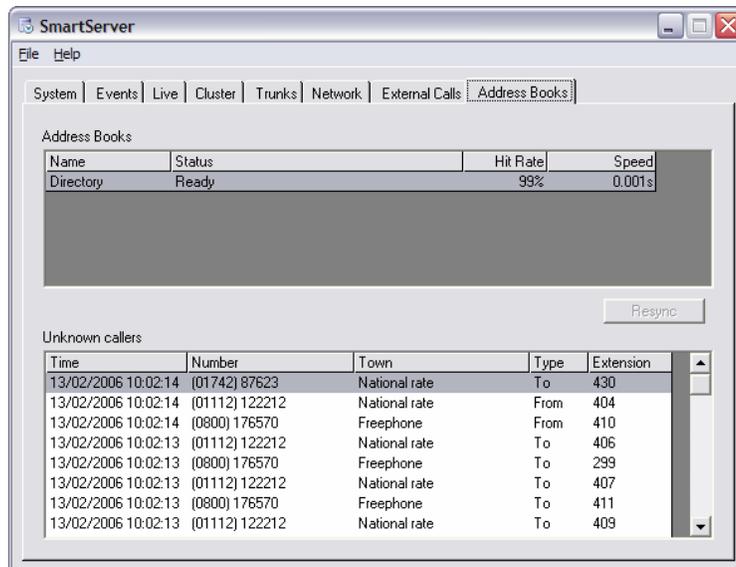
Call History

SmartServer keeps a database of all the calls made to and from every extension that it monitors. Using SmartPhone, you can view the last 50 of these calls for one extension. As a supervisor, you may want to see a list of the calls made to/from every extension, or you may wish to see more than the last 50 calls. Using the SmartServer **Export Call History** command, you can do this. You can also create complex reports using SmartReports (sold separately).

To export a call history to a tab-delimited text file, click **File**, **Export Call History**. The **Export Call History** window appears. On this window, select which types of calls to export from the **Type** drop-down list. You can select from either **All calls**, **Internal calls**, **External calls**, or **Missed calls only**.

All calls are external inbound, external outbound, and internal calls; that were either missed or answered.
Internal calls are just missed and answered internal calls (calls from one extension to another).
External calls are missed and answered; inbound and outbound; external calls (calls made to/from an external number).
Missed calls only - produces a list of missed (unanswered) calls.
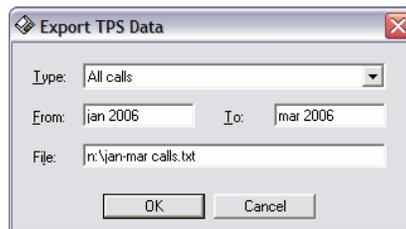
In the **From** box, enter the date to start the call export from. Enter the date in a recognized date format (e.g. **02/12/00** or **1.6.2001**) making sure that the day and month are the same way around as your Windows Regional Settings. So, if your system is set to use American date format, enter the start date in the format **mm/dd/yy** not **dd/mm/yy**.

Do a similar thing in the **To** box, but instead enter the last date to include in the export. So, to export calls that happened between the beginning of January and the end of February, you might enter **1/1/2002** in the **From** box and **28/2/2002** in the **To** box.

Finally, enter the path and name you would like to give the file in the **File** box and click **OK**. After a short while, the file will have been created and it will be opened in Notepad. If there are a large number of calls, it may take several minutes to create/open – depending on the processor speed of the SmartServer computer.

To illustrate using **Export Call History**, let us say that you want to have a list of all the external calls that were made and received between Christmas Day 2000 to the end of February 2001. You want the file to be saved on your desktop.

You would choose **External calls** from the **Type** drop-down list, enter **25/12/00** in the **From** box and **28/2/01** in the **To** box. In the **File** box, you would enter something like **C:\Windows\Desktop\external calls.txt**. When you click **OK**, the file is created and opened in Windows Notepad. Because the file is tab-delimited, you can import it into your favorite spreadsheet or database program such as Microsoft Excel. To do this, close Notepad, load the chosen program (in this case Excel), and open the saved file selecting the appropriate options (text format, tab-delimited).

SmartServer purges any calls from its database that are more than 45 days old. This number can be changed if necessary by Oak support personnel. However, by downloading call data into SmartReports at least once every three months, it is possible to keep a log of (and run reports on) all the calls that SmartServer has ever monitored.

TPS Lists

SmartServer enables support for TPS number lists. This helps you to not make calls to numbers on Telephone Preference Service lists. To use this feature, you would typically export all the telephone numbers that you are likely to call to a text file. You would then send this file to a specialist company. That company then sends the file back to you containing only the black listed numbers that you must not call. Then you would import that file into SmartServer and the client software would prevent calls to those numbers.

When you try to make a call to a TPS listed number, SmartPhone or SmartConnect will pop up with a warning message telling you that the number is TPS listed and that is why you should not be dialing it. There is a button on the popup message which you can click to ignore the warning and make the call anyway.

If you have a SmartCampaign license and want to export all telephone numbers from all the campaigns you have configured into a file to send to a TPS company, click **File** and select **Export TPS data...**. Select which campaigns to export data from, and enter a file name to export data to. Then click **OK**. Once the export is complete, the file will be opened in Notepad (or WordPad) for you to verify.

To import a list of blacklisted numbers, you just have to have a text document containing lines of numbers (punctuated or unpunctuated). Each number can optionally be followed by a comma and the person's name. You need to call the document **tps.txt** and save it in the same directory as Smart.exe was installed to (usually C:\Program Files\Oak Telecom Ltd\SmartServer).

Importing Contacts

To perform a one-off import of a list of contacts (not an Address Book), choose the **Import Contacts** item from the SmartServer program group on the Start menu.

The **Import Wizard** will start. Click **Next**. You will be asked to choose a name for the import profile, or select a previously used profile from the list.

Click **Next** again. Now choose the type of Address Book from the **Type** list, and then click **Configure** to configure the Address Book-specific options. For more information, see the **Plugins** section of this document.

If you tick **Delete contacts that no longer exist in this source** then a full synchronization will take place, and contacts that were previously imported into SmartServer from the source you configured but which no longer exist in the source will be deleted.

Click **Next** again. Choose what you want to do when a duplicate telephone number is found. You will usually use the **Update the existing SmartServer record** option.

Click **Import**. The contacts will be imported into SmartServer and the **Summary** screen will show you some information so you can make sure that the import worked.

Section Six

Plugins

SmartServer Address Book Plugins

SmartServer comes with a number of different address book Plugins that can be used to link SmartServer to different database sources to match telephone numbers to contacts. This section describes how to perform configuration on each of the currently available Plugins. For more general address book configuration information, please consult the relevant section of the **SmartServer Configuration Guide** in this document.

GoldMine Contacts (*.dbf; SQL)

SmartServer Configuration

To configure SmartServer to search your GoldMine contacts database, you first of all need to tell SmartServer where the database can be found. Do this by clicking the **...** button next to the **Data directory** textbox if your GoldMine data is stored in DBF files. A **Select GoldMine directory** dialog will appear. From here, browse to the directory which contains the GoldMine **Contact1.dbf** file. Click **Open**. Alternatively, select the data source that connects to your GoldMine SQL server by clicking the **...** button next to the **SQL server** box.
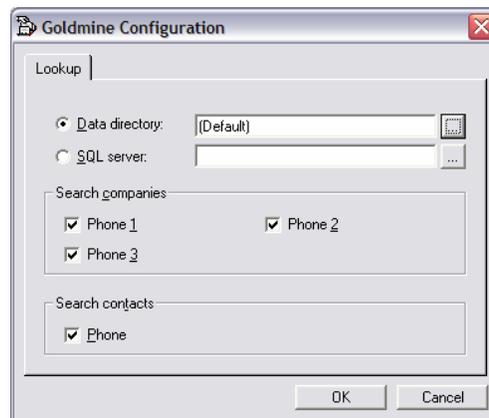
Next, tick the fields that you want SmartServer to search when looking up telephone numbers. In GoldMine, a company can have up to 3 telephone numbers stored against it. The **Phone 1**, **Phone 2**, and **Phone 3** boxes represent these telephone numbers. Contacts have one telephone number each. If you want SmartServer to search contact telephone numbers also, tick the **Phone** box in the **Search contacts** area of the **GoldMine Configuration** window.

Click **OK** to apply the settings, or click **Cancel** to continue using the previous settings. Your GoldMine contacts address book is now ready for use by SmartServer.

User Configuration

To configure a SmartPhone user's GoldMine Plugin settings, go to the **Directory** tab, select the user, click **Properties**, and go to the **Address Books** tab. Then highlight the GoldMine address book from the list and click **Configure**.

On the **Lookup** tab, enter the path to the directory that contains the GoldMine contacts (or the data source that connects to the SQL server where your GoldMine data resides if using SQL). Leave this as **Default** if the user doesn't have a private GoldMine contacts database different to the one set up for use by SmartServer.

On the **User** tab, enter the user name that the user uses to log in to GoldMine in the **User** box, and choose whether the user is able to dial from GoldMine by ticking or clearing the **Use SmartPhone to dial** checkbox.

Maximizer Contacts

SmartServer Configuration

First select the directory where the Maximizer database is kept, or the ODBC data source that connects to your Maximizer SQL server. Do this by clicking the relevant **...** button.
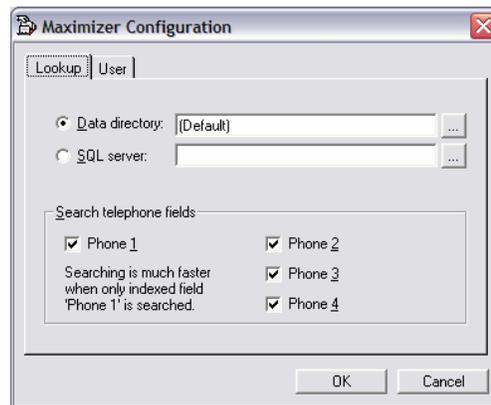
Next, tick which Maximizer telephone number fields SmartServer should search. There are 4 telephone fields in Maximizer named **Phone 1** to **Phone 4**. On the User tab you will also want to enter the username and password SmartServer can use to log in to Maximizer.

User Configuration

For the user configuration of the Maximizer address book Plugin, you just need to enter the **Database directory** or **SQL server** and log in information (if different from the default set on the server).

Microsoft Access database (*.mdb)

SmartServer Configuration

First you need to select which database file to use by typing in the **Database** box or clicking the **...** button. If there is an error with the path you have entered, an error message will appear at the bottom of the window above the **OK** and **Cancel** buttons.
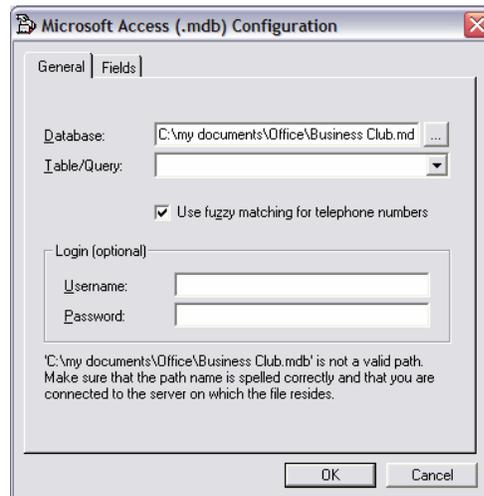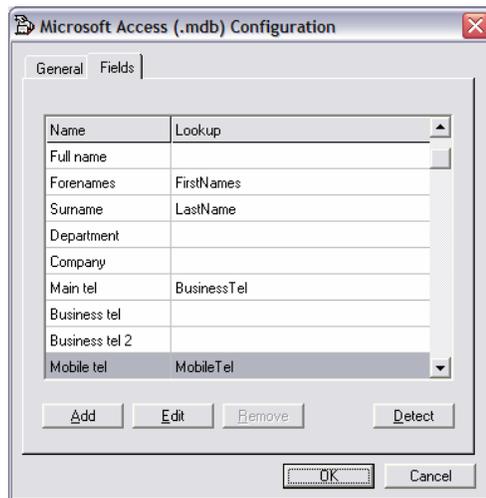

Next you need to enter or select from the **Table/Query** dropdown list the table or query you wish to search for telephone numbers in.

Tick the **Use fuzzy matching for telephone numbers** box if you want SmartServer to match only digits when searching for telephone numbers. For example, if the database has the number stored as **+44 (0) 1202 607000** and you search for (**01202) 60 70 00**, a match will only be found if the **Use fuzzy matching for telephone numbers** box has a tick in it.

You may also need to enter a **Username** and **Password** to access the database. If the database is password protected and you do not enter login information, a Microsoft Access login box will appear every time SmartServer connects to the

database (usually when SmartServer loads) and searching will not work until you have logged in.

On the **Fields** tab, you need to select which fields from the database map to which fields in SmartServer. You can have SmartServer try and guess the fields by clicking the **Detect** button. You will probably need to modify some fields though. To do this, double-click the SmartServer field name from the list and in the window that appears, select the database field name that maps to it. For instance, for **Unique Id** you might select **AccNum** or **RecordId** or similar.

You must map the Unique Id field and at least one telephone number field in order for SmartServer to be able to search the database properly.

If there are fields in the database which you wish to map but don't have an equivalent field in SmartServer, you can click the **Add** button to create a new SmartServer field. These fields will be shown on the **Extra** tab of the **Contact Details** window in SmartPhone.

User Configuration

The user configuration of the Access address book Plugin is so that you can enter the path to the file to use in the **Database** textbox, and enter different login details in the **Username** and **Password** boxes.
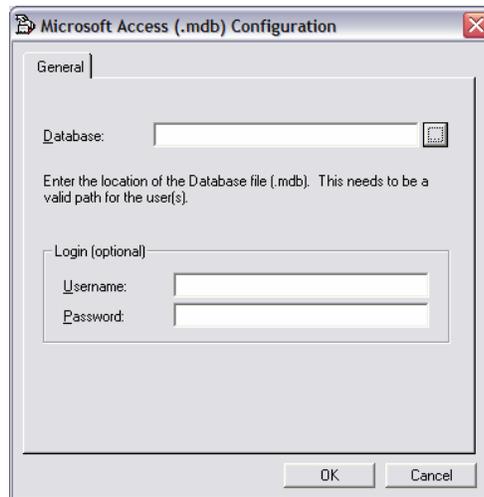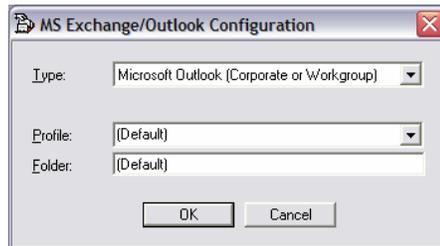
Microsoft Outlook/Exchange

SmartServer Configuration

When you configure a Microsoft Outlook/Exchange address book, you will need to select which sub-type of address book you are connecting to – Microsoft Outlook (not Outlook Express), or Microsoft Exchange Public Folder Store.

If you select **Microsoft Outlook (Corporate or Workgroup)** from the **Type** dropdown, you will need to select a **Profile** to log in as. If you select **Microsoft Exchange** from the **Type** dropdown, you will need to enter the name of the computer running Microsoft Exchange Server and the mailbox name to log in with.

Then you just need to enter the uniquely named folder where your contacts are kept, or leave it as **(Default)** to use the default Contacts folder.

NB: If you use **Microsoft Outlook (Corporate or Workgroup)** from the **Type** list, you cannot use **Contacts** as the folder name because the Plugin will attempt to use the selected profile's private contacts folder rather than a public folder.

To use Outlook or Exchange as a source, you must first have installed the CDO (Collaboration Data Objects) component – this can be found on the Outlook and Exchange installation media.

User Configuration

The user-specific configuration of the Outlook address book Plugin is the same as the SmartServer configuration. You select the **Type**, **Folder**, and enter login details (**Profile** or **Server**/**Login**).

Custom Data Source (ODBC)

SmartServer Configuration

First of all, click the **...** button to select the data source that is to be used. The Microsoft Windows **Select Data Source** window will appear. This window may look slightly different on different operating systems, but it should have two tabs: **File Data Source** and **Machine Data Source**. On either of the two tabs, click the **New** button to set up a new data source if you have not already done so, and then select the data source you wish to use and click **OK**.

Now select which table/query to use by selecting from the **Table/Query** dropdown list or typing a query.

Tick the **Use fuzzy matching for telephone numbers** checkbox if you want SmartServer to match only digits when searching for telephone numbers. For example, if the database has the number stored as **+44 (0) 1202 607000** and you search for (**01202) 60 70 00**, a match will only be found if the **Use fuzzy matching for telephone numbers** box has a tick in it.
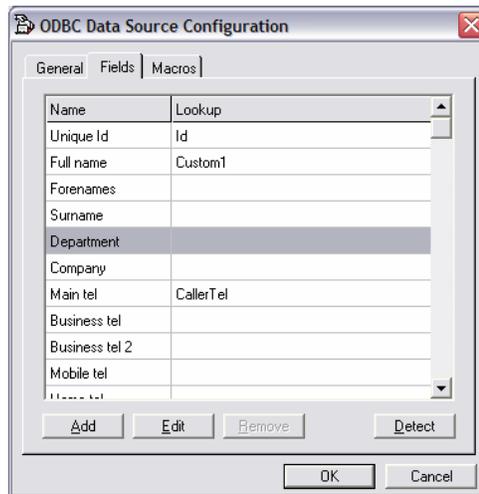
Tick the **Search all fields** option to enable searching of all commonly used text fields when searching for text (instead of just searching the name and company fields).

If there are no errors in the data source and table you have specified, you may click the **Test** button to run a test query so you can check that the table you have selected contains the correct data. If there are any errors, you will see the error text displayed instead of the **Test** button.

On the **Fields** tab, the options are the same as for the Microsoft Access Plugin; you need to select which fields from the database map to which fields in SmartServer. You can have SmartServer try and guess the fields by clicking the **Detect** button. You will probably need to modify some fields though. To do this, double-click the SmartServer field name from the list and in the window that appears, select the database field name that maps to it. For instance, for **Unique Id** you might select **AccNum** or **RecordId** or similar.

You must map the Unique Id field and at least one telephone number field in order for SmartServer to be able to search the database properly.

If there are fields in the database which you wish to map but don't have an equivalent field in SmartServer, you can click the **Add** button to create a new SmartServer field. These fields will be shown on the **Extra** tab of the **Contact Details** window in SmartPhone.

User Configuration

The user configuration of the ODBC address book Plugin is the same as the SmartServer configuration.

ACT! (*.dbf)

This Plugin is for versions of ACT! that store data in DBF files (i.e. not ACT! 7 or above)
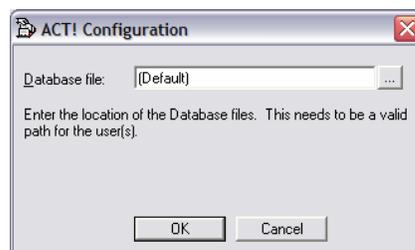
SmartServer Configuration

First you need to select the directory where the ACT! database is stored. Enter this information in the **Database file** textbox, or click the **...** button.

Then select which telephone number fields to search from the 6 available by ticking the appropriate boxes: **Phone**, **Phone 2**, **Phone 3**, **Mobile Phone**, **Alt Phone**, and **Home Phone**.

User Configuration

To perform user configuration for the ACT! address book Plugin, you just need to confirm the path where the database file is stored. Do this by entering it into the **Database file** textbox or clicking the **...** button.

ACT! Professional

This Plugin is for versions of ACT! that store data in a .pad (Microsoft SQL database) file (i.e. ACT! 7 and 8).

SmartServer Configuration

All you need to do is tell SmartServer which file contains the data you want to link to, by clicking the **...** button and browsing to the relevant .pad file, and then enter a **Username** and **Password** of an ACT! user that can access the data.
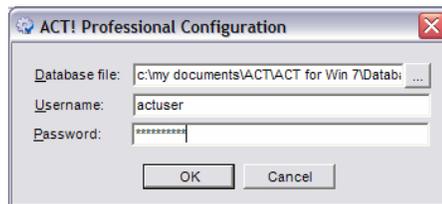

User Configuration

User configuration is the same as SmartServer configuration. The user's path to the .pad file might differ to the server's path to it, or you might want to use a different username on clients than on the server.

Lotus Notes (*.nsf)

SmartServer Configuration

You must have Lotus Notes installed and working (able to access the data that you want SmartServer to access) on the SmartServer machine before setting up a Notes address book in SmartServer.
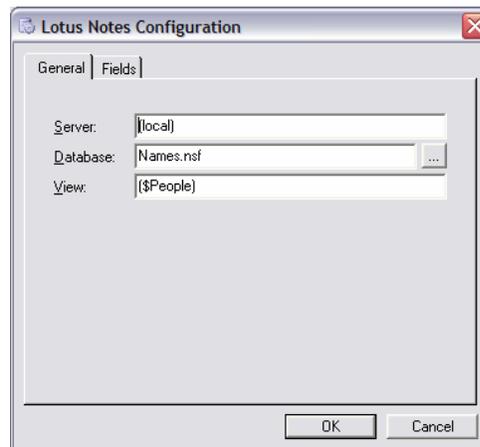
Enter the name of your Lotus Notes (Domino) server in the **Server** text box (or leave as **(local)**). Then enter the name of the database to use in the **Database** field (usually this will be kept as **(default)** to use the address book that Notes is set up to use). Finally, select the view to use by entering the name of a view in the **View** textbox. This is usually left as **(default)**.

Using the **Fields** tab, you can edit the fields that SmartServer will use to look for contact information in. You only need to change the information on this tab if you have changed the default settings of Lotus Notes.
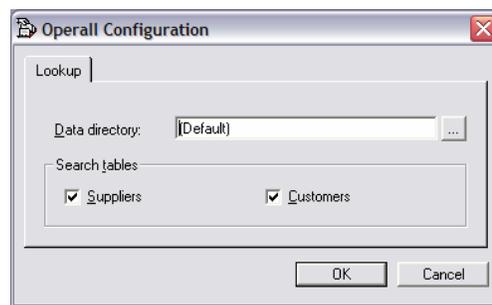
User Configuration

The user configuration is the same as the SmartServer configuration for this Plugin.

Pegasus Opera II

SmartServer Configuration

To configure this Plugin on the SmartServer machine, click the **...** button and browse to the directory containing the ?_sname.dbf files. This directory will also contain all the files that SmartServer needs to work with Opera II.

Tick which tables to search: **Suppliers**, or **Customers**, or both.

User Configuration

User configuration is similar to server configuration, except that you cannot choose which tables to search.

You only need to perform user configuration if the path to the Opera II data files is different on the client machines to what it is on the SmartServer machine.

SuperOffice CRM Version 5

SmartServer Configuration

First, select the data source that has been set up to connect to SuperOffice by clicking the **...** button.

Then, tick to choose whether to search the **Companies** and **Persons** tables.
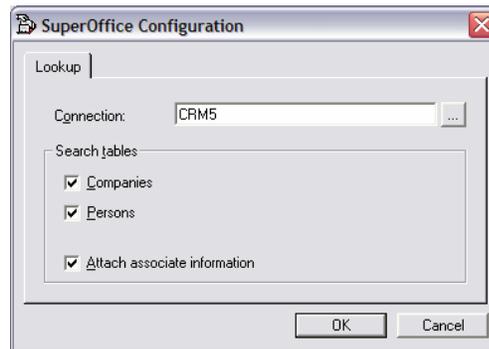
If you tick the **Attach associate information** box then a Live address book will be slower, but the name of the staff member that is associated with the record will be available on the contact record card in the address book.

User Configuration
On the user configuration dialog, you can select the data source that connects to your SuperOffice data, in case it has a different name to the one that the SmartServer computer uses.

Microsoft CRM

SmartServer Configuration

Enter the name of the CRM server computer in the **Server** textbox.

Select which contact types you want this address book to search. You can select **Accounts**, **Contacts**, and **Leads**.

User Configuration

User configuration is the same as SmartServer configuration.