

# ***SmartServer***

## **Quick-Start Guide**

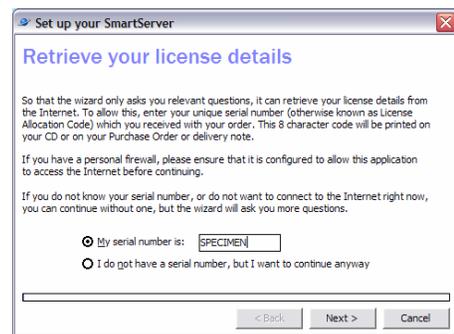
OAK-SVQ-04  
SmartServer Quick-Start - Oak

## SmartServer Quick-Start Guide

This document will guide you through configuring your new SmartServer software for the first time. Even after you have read this guide, you might still want to keep it handy for future reference. For a more in depth review of the software, you should read the full user documentation.

### Using the Post-Installation Wizard

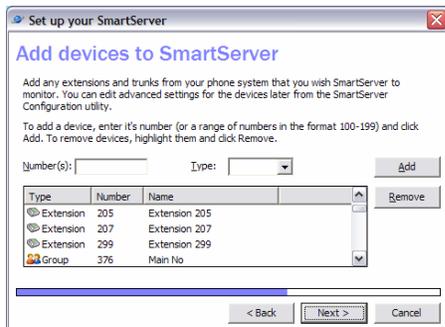
The Post-Installation Wizard should start automatically after installation ends. If your SmartServer has an Internet connection that needs manually connecting, you should do so before starting the Wizard.



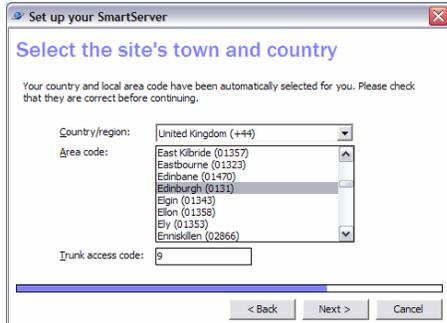
After reading and accepting the license agreement, you can enter your Serial Number (or License Allocation Code). This eight-character code should have been given to you when you obtained the software. When you click **Next**, the Wizard will try to connect to the Internet to obtain your license(s). If you have a personal firewall, you should configure it to allow the Wizard to access the Internet.

Next the Wizard will ask you to confirm the type of phone system you want SmartServer to connect to and depending on your choice you may be prompted for other settings such as its IP address.

After the Wizard has confirmed that your phone system can be connected to using the settings you supplied and has automatically downloaded the extensions and trunks that are available for SmartServer to monitor, you will have the chance to add more devices that the Wizard may have not been able to find. You will be able to edit device names and security options later on.



When you click **Next**, you will be asked to confirm the country and town that your phone system is in, and your primary trunk access code. This information is gathered automatically for you from your operating system configuration.



The next screen will ask you whether you want to run SmartServer as an application or as a service. If you do not understand the differences between

running a service and running an application, you should tell the Wizard that you want to run SmartServer as an application.

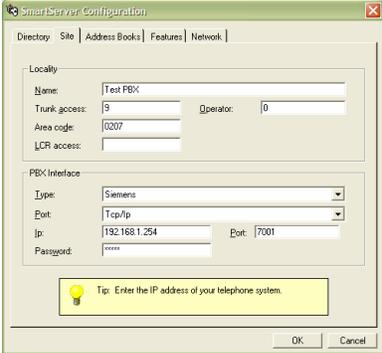
You will now be asked to enter site details which will be used to license your copy of SmartServer and register it (enabling you to receive technical support during the warranty period). If you don't have an Internet connection, you can call the Oak Telecom licensing hotline who will be pleased to help you license your SmartServer manually.

When you click **Finish** your computer may need to reboot in order for installation to complete. Otherwise SmartServer will start and you are now ready to configure some of the more advanced settings of SmartServer!

Load SmartServer Configuration by clicking the **File** menu in SmartServer and selecting **Configure**, or by selecting **SmartServer Configuration** from the **SmartServer** program group on the Start menu.

### Site Tab

Go to the **Site** tab and notice that the information has been filled in for you by the Post-Installation Wizard. The only thing you may need to enter are any **LCR codes** that you use.



The screenshot shows the 'SmartServer Configuration' dialog box with the 'Site' tab selected. The 'Locality' section contains the following fields: Name (Test PBX), Trunk access (9), Operator (0), Area code (0207), and LCR access. The 'PBX Interface' section contains: Type (Siemens), Port (Tcp/ip), Ip (192.168.1.254), and Port (7001). A tip box at the bottom states: 'Tip: Enter the IP address of your telephone system.' The dialog has 'OK' and 'Cancel' buttons at the bottom right.

## Directory Tab

Next you need to configure the extensions that SmartServer is monitoring. On the **Directory** tab, highlight an extension and click the **Properties** button.

Enter the relevant details such as extension **Number**, **Name**, **DDI number**, and **Department**, and click **OK**.



## Address Books Tab

The last thing you would probably want to do after a new installation is add an address book that SmartServer can link to. Go to the **Address Books** tab and click **Add**. Select the type of data source from the list and click **Configure**, then perform the configuration and click **OK**, then choose from the **Advanced** tab whether this address book should be used live or cached (cached is best for slow or data sources containing large numbers of records that are not indexed). Click **OK** to close the **Address Book Properties** screen.

Click **OK** to exit SmartServer Configuration. Now that you have SmartServer up and running, you should read *SmartServer Documentation* to find out how to configure advanced features.

