

1.0 Unified Communications Installation & Configuration Guide

This guide is arranged into two sections:

1.0 Installation: Preparing a PC to install Unified Communications Server (UC Server) through to the installation and first run of the software.
Installing the BT Unified Communicator client software onto users PC's.

2.0 Configuration: Configuration and use of the Client software

1.1 Introduction

The UC Server and Client software is supplied on CD or as an internet download. It is a self-contained setup program that contains the files needed to install a copy of UC Server linked to a BT telephone system.

The setup program contains the following Microsoft libraries which will be installed if they are not already present:

Windows Installer 3.1
Microsoft .NET 2.0
Microsoft SQL Server 2005 Express



The setup program also contains the necessary drivers that are required to communicate with the telephone system.

The UC Server software does not contain the files needed for client installation. These should be downloaded or sourced separately.

The client software is licensed on a per PC basis, and the license is entered on the server as part of the installation process. If possible, please have the license code available during the installation. Otherwise, the software will work for 30 days and then expire.

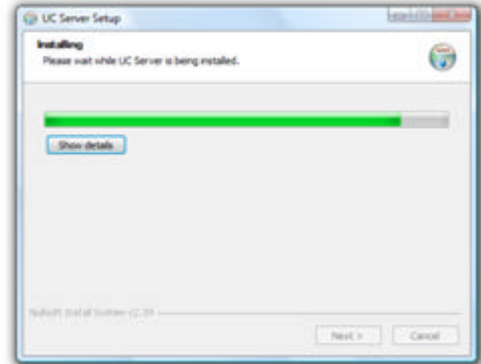
1.2 Before you start

Before you start, please check you have the following:

- A suitable PC to install UC Server and Client - see section 2.13
- The UC Server software setup program
- The UC Client software setup program
- The IP address of the BT telephone system
- System software version 902 and BBM software version 189 or later.

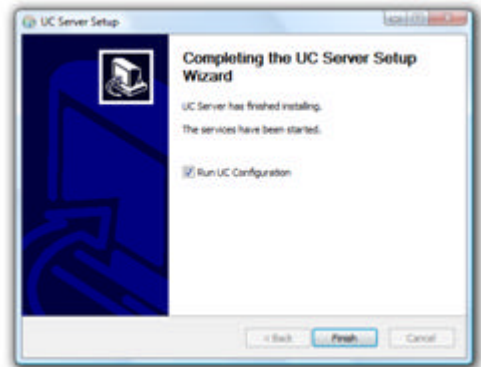
1.3 UC Server software setup

To install the UC Server software, double-click on the UC Server setup program. The installer package should launch and the installation will commence. The installation process may take between thirty seconds and ten minutes depending on the software that is already on your PC. If the PC is a brand new installation of Windows XP, then the setup disks will install a number of Microsoft components that take some time. Microsoft .NET 2.0 is one of the more lengthy components. If this is required, please be patient while the software installs. It may even be necessary to reboot your PC during this process. Please follow any instructions given.



If Microsoft .NET 2.0 is already on the PC then the installation should be much quicker.




After the installation is complete, a dialog box will appear to confirm this. You will be asked if you want to run the configuration program. Please do this to complete the installation. If you choose to not run the configuration program at this time then you can run it again later from the icon installed under the start menu.



Note: The UC Server software takes around two minutes to start on the first occasion that it is run. Please be patient during this process.

1.4 UC Server services

As part of the installation process, three services will be installed and started. They are a mini-HTTP server service, the main UC Server service and a telephony host service. All three will be set to start Automatically and be Started.

 UC HTTP Service	Provides HTTP access ...	Started	Automatic
 UC Server Service	Writes calls provided b...	Started	Automatic
 UC Telephony Service	Connects telephone sy...	Started	Automatic

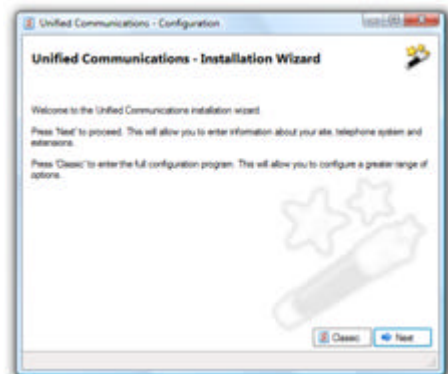
1.5 UC Server firewall ports

The UC clients and server communicate using TCP port 21050 and UDP port 21059. The server installation should configure the local firewall to allow support for these services. In the event that a non-standard firewall is used then these ports may need to be "allowed" manually.

1.6 Installation Wizard

When the UC Configuration program runs for the first time, the installation wizard appears. You are presented with a series of pages that, when complete, will allow you to finalize the installation of the server components.

Press the 'Next' button to begin the installation wizard process.

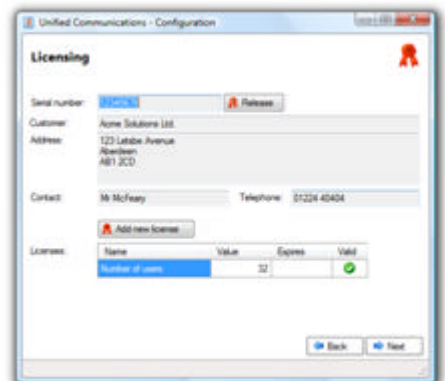


The first page asks you to enter information about your location. Please enter a name for your site, and then configure the Country and Area. The countries and areas are listed in alphabetical order, for convenience. If you select a new country then the area codes selection will change accordingly.

The Registration page will appear. Enter the customer's details and choose a registration method:

If internet access is available then press the 'Register online' button. This is the simplest option.

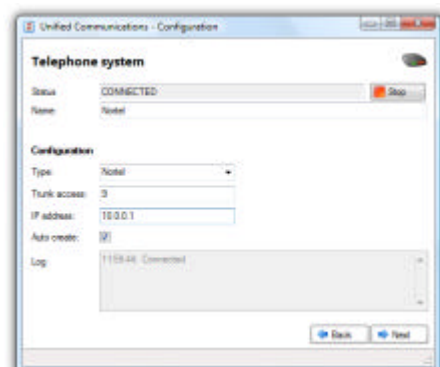
If there is no internet access then choose the 'Register by phone' option. Follow the prompts, specifically make a call to the registration department on 0116 2578147 and enter the information that you are given into the window that appears. If you don't have a serial number and are installing out of hours then you can choose the 'Register for trial' button. This requires internet access and will provide a time-limited license.



Press 'Next' to go onto the next page.

Next, you need to enter information about your telephone system environment. The Type should be set to your telephone system and Auto create should already be set.

Enter the trunk access code (normally 9) and the IP address of the telephone system. Press 'Next' when done.



At this point, the software will attempt to connect to the telephone system and download a list of extensions. This process can take a few seconds.

After the extension list is downloaded, you may want to review it, and manually add or remove any extensions using the buttons provided.

If after about 30 seconds the extension list hasn't started downloading, press the 'Back' button to review the telephone system settings. You might also look at the Log as any relevant error messages would be contained here.

When you have finished reviewing the extensions press the 'Close' button. The installation wizard will end.

1.7 Client installation

The client software should be installed onto each networked PC that the customer has specified. This PC should be compliant with the software requirements and be up to date service packs. Before you start the installation, please ensure that you have:

- 1) Installed the server software
- 2) Access to the client PC and permission to reboot it, if necessary
- 3) The IP address of the server PC
- 4) Have up to date service packs.

1.8 Client Installation procedure

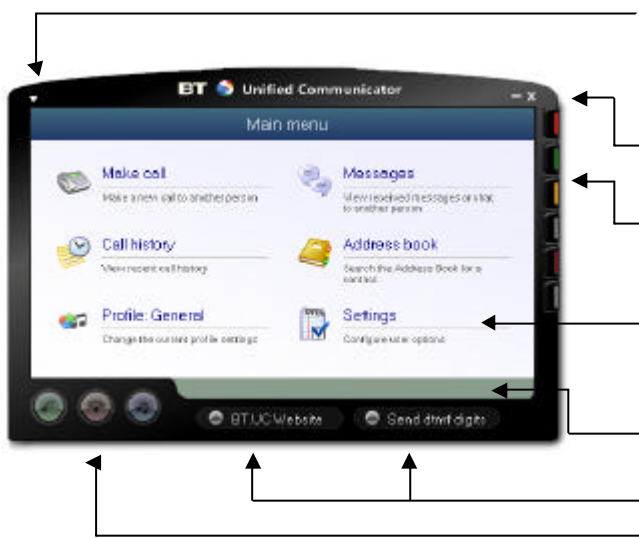
Please follow the process below to install the UC Client software

- 1) Run the UC Client installation software (called InstallUCClient.exe) on the designated PC.
- 2) Follow the prompts. Several additional components may be installed depending on the client PC.
- 3) For a successful client software installation, the BT Unified Communicator will start at the end of the installation process.
- 4) When the client software starts, the installation wizard screen will appear. Enter the server's IP address into the designated box. (Alternatively, you can press the 'Detect' button to save time). Press the 'Next' button.
- 5) The second page of the installation wizard will appear. Enter the number of the local extension. Press the 'Save' button. The client software should reinitialize and the tray icon should become a green circle.
- 6) Perform the following test to check that everything is ok: Lift the handset on the local extension. The tray icon should become a red circle. Put the handset back on its cradle the tray icon should go green again.
- 7) Proceed to the next client PC.

2.0 Configuration & Quick Start Guide

Welcome to BT Unified Communicator. This quick reference guide contains some useful information to help you get started. BT Unified Communicator runs in the system tray. It will appear as a green (or another color) circle. If you double-click on the tray icon then the Phone window will appear.

2.1 The main Phone window



Menu button: You can get quick access to many parts of the software from here. You can also double-click on this button to go straight to the main menu.

Minimize and close: These will make the phone window disappear.

Slider buttons: These configurable buttons will make the Presence window and other optional windows appear.

Main canvas: This dynamic area is where menus, calls, messages and a number of other things appear.

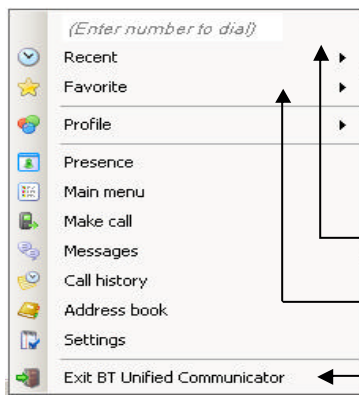
LCD Panel: This shows details of any active call

Custom buttons: There is space for two user-definable buttons

Call control buttons: These buttons light up to allow you to Answer, Hang up or Hold any active calls.

2.2 Tray menu

Many of these options match the choices in the Phone window. Choosing these options will show the Phone window and go to the respective page.



Quick dial box: Enter a number here and press Enter to make an immediate phone call.

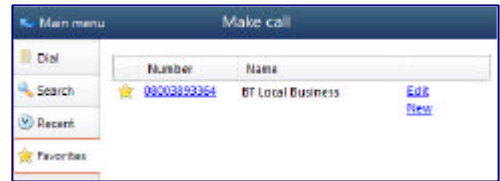
Recent and Favorite menu: These offer a quick way of making calls.

Exit: Use this to unload the software.

2.3 Making calls

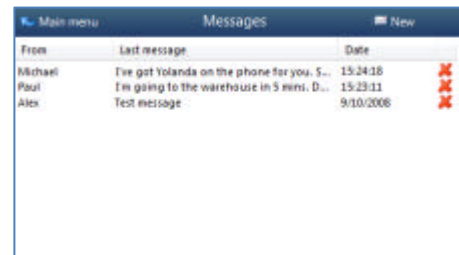
This page allows you to make calls directly by:

- 1) Dial – typing the number to dial
- 2) Search – searching by name for a contact in your address books
- 3) Recent – clicking on the last eight contacts that you have spoken to
- 4) Favorites – maintaining a list of contacts that you regularly speak to



2.4 Messaging

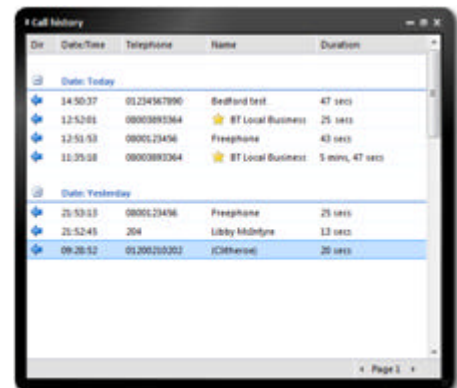
The messaging shows you a list of recent text messages (also called threads) that you have sent or received. To send a new message to another user or contact you can press the 'New' button and type in their user name and the message that you want to send.



2.5 Call history

The Call history screen shows your fifty most recent calls, arranged in reverse date and time order. The next fifty can be accessed by pressing the page right button in the bottom right of the window.

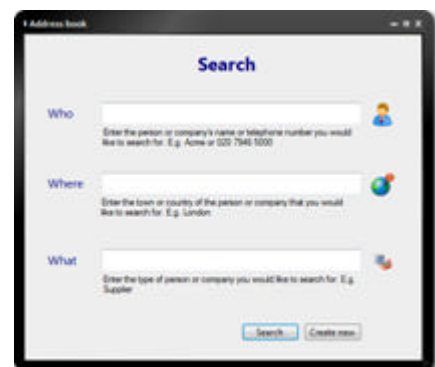
You can make calls from this window by clicking on the contact's telephone number and you can add or edit their name by clicking on the entry in the Name column.



2.6 Address books and contacts

The Address book window provides access to a company-shared address book. You can either use the 'Create new' button to add a contact for future use, or type in search criteria and press 'Search' to look for existing contacts.

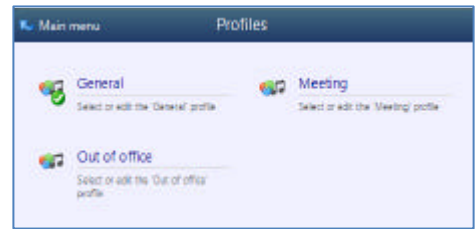
The contacts in the address book can be entered in a number of different other ways including during a telephone call and from the Call history.



2.7 Profiles

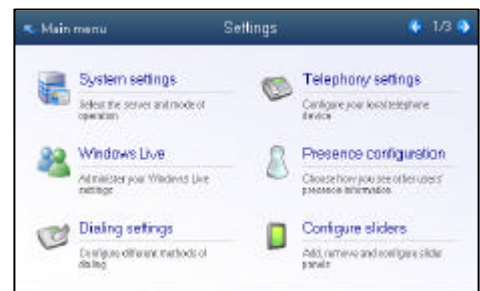
Profiles allow you to indicate whether you are available (General), busy (Meeting) or away (Out of office). To use a profile, click on the desired profile and press the 'Activate' button.

When you select a profile you can also 'Configure' a number of options that affect the use of the software while that profile is selected.



2.8 Settings and configuration

The Settings menu contains many options that you can change to personalise your user experience. There are actually three pages of options, so to access the second or third page of options you can use the left/right buttons in the top right hand corner.



2.9 Call control

When you are on a telephone call the software will show information that is known about the person you are speaking to and a list of actions that you can perform:

Contact information: The name and telephone number of the remote person.

Main menu: Click here to return to the main menu

Page left/right: Use these to switch between calls when you have more than one call in progress.

Call actions: Use these buttons to interact with the current call.

Send digits: Click here to present DTMF buttons in visual format. Selecting this also switches the keyboard interface into DTMF mode.

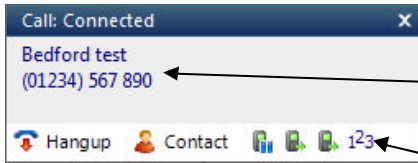
Call information: Other information about the current call.

LCD Panel: The LCD panel shows information about the active call. If you change pages above then this won't necessarily be for the same call as shown in the main Phone window.

Call control: The call control buttons are Answer, Hangup and Hold. The buttons disable (go dim) when they can't be used.

2.10 Preview window

By default the preview window is set to appear for inbound calls. This setting can be changed, if needed, through the Profiles menu:



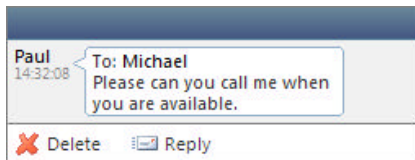
Close button: Use this to make the Preview window disappear more immediately.

Contact information: The telephone number and name of the other party.

Call control actions: Use these to interact with the call. Using some of these will display the selection in the main Phone window.

Add Contact : During a call a new contact can be added.

2.11 Previewing messages

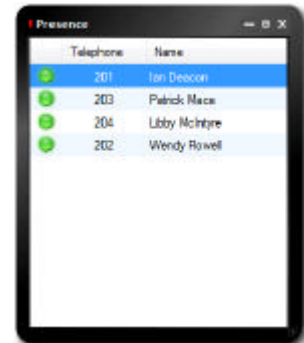


The preview window is also set to appear, by default, for text messages. The Preview window will remain on the screen when you receive a message until you chose to Close, Delete or Reply to it.

2.12 Presence window

The Presence window provides a quick way to check the availability of your colleagues. The Presence window is accessible from the tray menu or the red slider button on the right hand edge of the phone window. By default, the Presence window shows a list of all the extensions.

If you click on one of the entries in the Presence list, then a context menu should appear. This context menu contains a list of actions that you can perform with the extension.



2.13 Server and Client PC specifications :

Server Specification - up to 40 users :

Window XP Pro or Vista Business O/S, Core2, 1.8 Ghz , Processor, 2GB RAM, 400Mb HDD, LAN, Internet connection, Internet Explorer.

Client PC Specification :

Window XP Pro or Vista O/S, Core 2, 1.4 Ghz, Processor, 1GB RAM, 200Mb HDD, LAN, Internet connection.