SmartServer Documentation Contents

SmartServer End User License Agreement

This End-User License Agreement (EULA) covers SmartServer and SmartServer Configuration.

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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, SmartMonitor, SmartOperator, SmartReports, 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 SmartServer Installation Guide. To find out how to set up SmartServer for use in your company, refer to the section SmartServer Configuration Guide. 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 Tiger Software web site: www.tiger-software.com.

This document is broken up into five main parts:

- **SmartServer Introduction & Requirements**: This section contains hardware/software requirements for running SmartServer.
- **SmartServer Installation Guide**: Explains the correct method of installing SmartServer.
- **Licensing SmartServer**: Information on the SmartServer licensing system.
- **SmartServer User Manual**: Explains what can be done with SmartServer.
- **SmartServer Configuration**: Explains how to set up SmartServer to work with your phone system.

The user manual is broken into two sections:

- **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.

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.
- **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 it's 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.

Minimum Requirements

- IBM-PC or 100% compatible running Windows 98 / NT Workstation 4 SP6a
- 700MHz Celeron-class processor
- VGA display
- 64 MB Memory
- 100 MB free hard drive space
- Network adapter bound to a TCP/IP network
- Mouse
- Spare serial port (dependant on switch)

Recommended Requirements

- IBM-PC or 100% compatible running Windows 2000 Professional / Server SP3 or later
- 1GHz Pentium III class processor or above
- 800x600 or higher display resolution
- 128 MB or more memory
- 500+ MB free hard drive space
- Network adapter bound to a TCP/IP network
- Mouse
- Spare serial port (dependant on switch)
- CD-ROM drive
- Microsoft Data Access Components 2.7 or later

SmartServer Test Platforms

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

Operating Systems
- Windows 98, 98 SE
- Windows NT4 SP6a
- Windows 2000 SP2 / SP3

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

Telephone Systems
- Siemens HiCom / HiPath with CSTA
- Samsung Compact 2 / DCS / iDCS
- Inter-Tel Axxess
- NEC Infrontia
- Network Alchemy
- Nortel Business Communications Manager
- Panasonic KXTD

SmartServer Installation Guide

For optimal performance, Tiger Software recommends installing SmartServer on a dedicated PC that is close to the PBX. This PC needs to have a TCP/IP connection to the local network and a spare serial (or COM) port.
NB Some configurations do not require a spare serial port. If you are unsure, contact Tiger Software.

Before you install the SmartServer software, you will typically need to connect the PBX to a spare serial port on the PC. Please discuss this with your telephone maintainer.

You also need the TCP/IP network protocol installed. Please see the Windows Help topic on "Networking" to find out how to install TCP/IP on your machine. In Windows 2000, if you have a network card installed in the machine, TCP/IP should already be installed.

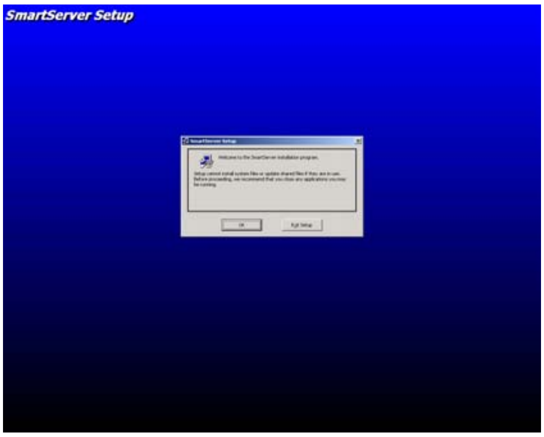
When you are ready to install the software, ensure that no programs are running on the SmartServer machine and proceed as directed below.

Installing from a CD-ROM

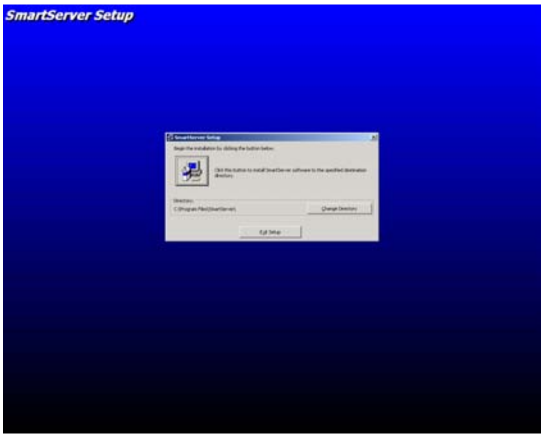
Insert the CD-ROM into your CD-ROM drive and installation should begin automatically. If setup does not begin click **Start**, click **Run**, enter **D:\SmartServer 1.40\Setup.exe** in the **Open** box that appears (replacing **D** with the letter of your CD-ROM drive). Click **OK** and installation will begin.

Installing from an Internet distribution

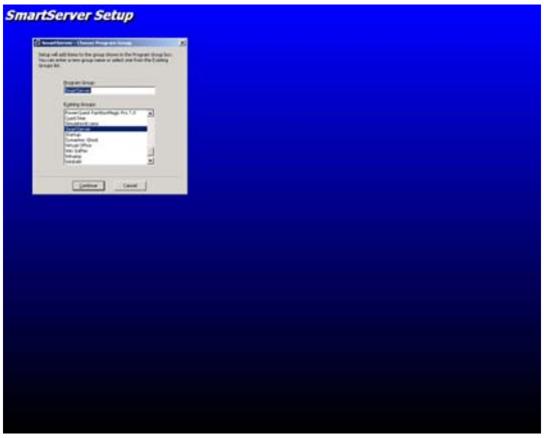
Use **My Computer** or **Explorer** to browse to the folder where you extracted the SmartServer installation files. Double-click on the **Setup.exe** file. Installation will begin.



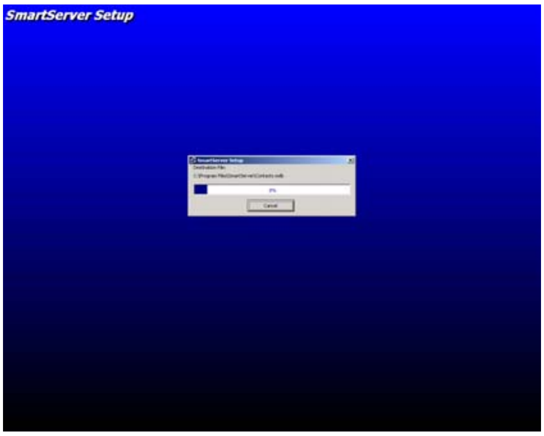
The first screen that appears when SmartServer installation begins is the **Welcome** screen. Click **OK**.



The next screen gives you a chance to change where files are installed. Click the big button with the picture on it to continue.



The next two screens are to confirm the names of the Start menu folders that you would like to make shortcuts in. Click **Continue** on both these screens. If you wish to cancel installation, this is your last chance to do so before file copying begins.



Finally, the SmartServer files are copied to your computer.

When files have been copied and shortcuts created, a message box will appear to inform you that setup completed successfully. Click **OK** and the setup program will end.

Once installation is finished, you should configure SmartServer to work with your PBX. First, load SmartServer by clicking on its item in the **Start** menu. Once SmartServer is running, open the **System** menu and click **Configure**. The SmartServer Configuration program will load. To find out how to use this program, read the **SmartServer Configuration Guide** section of the SmartServer manual.

If you ever wish to uninstall SmartServer, make sure SmartServer isn't 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**.

Licensing SmartServer

This document explains how to obtain licenses for SmartServer and how to enter them onto your computer.

Free Trial Period

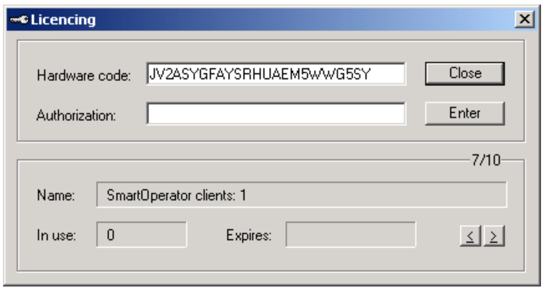
SmartServer comes with a 30-day / 5-client free trial period so that you can test it and so that you can decide how many licenses you need to purchase. During this period you are not required to buy a license, however, after this 30-day period has ended, if you wish to keep using SmartServer, you are obliged by law to purchase a license. In fact, after the trial period is over, SmartServer will no longer work until you obtain a license. Licenses can be obtained from Tiger Software or your local SmartServer dealer (if appropriate).

NB The public telephone networks are not designed to be, nor should in any way be considered to be secure or fraud proof. Tiger Software will not be held responsible for any direct or indirect losses incurred by you or your company as a consequence of sending your personal information through such a network by telephone, fax, or email.

Getting an Authorization Code

When you contact Tiger Software for a SmartServer license, they will ask for the **Hardware Code** that can be found by clicking **Help**>**Licensing…**. This 24-character code uniquely identifies your version of SmartServer as well as the computer it is being run on. After giving this code to Tiger Software, you will receive a similar 24-character code that tells SmartServer what sort of license you have. This code will only work on the copy of SmartServer you got the Hardware Code from, and only on the computer that this copy of SmartServer is running on. Enter this code in the **Authorization** box of the **Licensing** dialog box and click **Enter**.

The type of license (and possibly the license's expiry date) will appear in the appropriate boxes on the bottom half of the **Licensing** dialog box. You may have more than one license for SmartServer at one time. To view information about other licenses, click the left and right arrow buttons. Click **Close** to exit this dialog box.

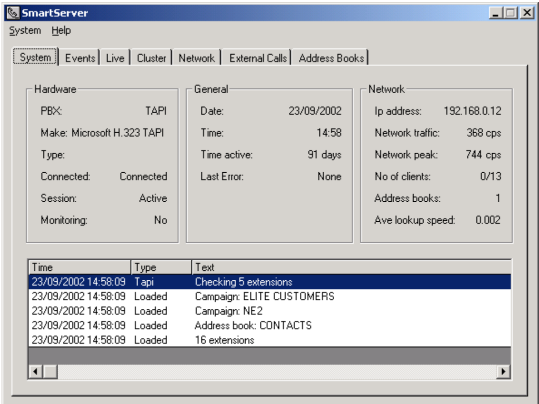


Tiger Software may refuse to give out an Authorization Code if they believe the software was not installed by a certified SmartPhone Engineer, or if the installer does not have a valid Purchase Order number.

SmartServer User Manual

Information

Using SmartServer, you can gain access to a wealth of information, some of which is also available from SmartPhone. 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 SmartServer is connected to is shown next to the **PBX** label. For HiCom, HiPath, and Inter-Tel connected 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 (see Part 2 of this manual).

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

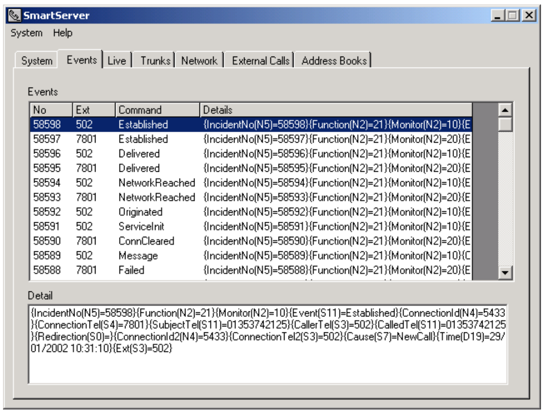
This area shows: the current date and time (updated every minute) of the SmartServer computer, the length of time SmartServer has been running, and the last error message received by SmartServer (if any).

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 SmartPhone 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 licences you have – e.g. if you have 10 SmartCampaign licences, and 50 SmartPhone licences, 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 takes to resolve a contact telephone number (based on the last five searches). This should always be below 0.5s. If it is not, SmartPhone users may notice a delay between their phone ringing and SmartPhone popping.

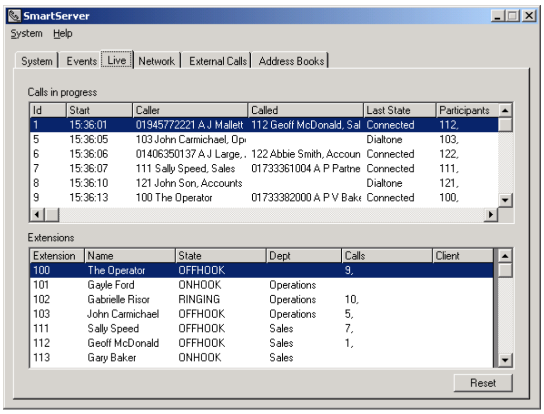
Event list
The grid in the bottom half of the window is used primarily for informational purposes. It logs when events and warnings/errors happen. The sorts of events you can expect to see are **System restarted**, **Configure**, **Loaded** n **extensions**, **Loaded Address book:** <name>, etc.



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, Parked, Ringing, Connected) and the other extension numbers 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 Tiger Software 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.

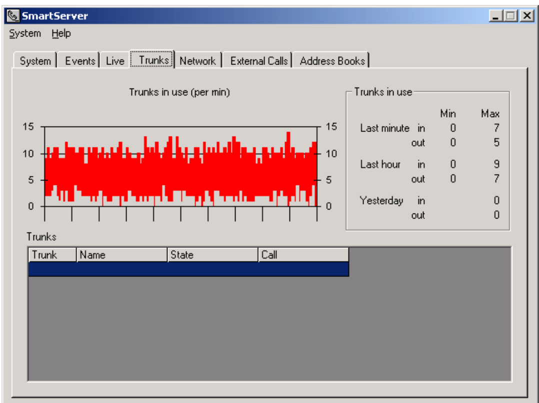
Trunks

The **Trunks** tab will only be visible if you are connecting to a non-TAPI switch, such as Siemens HiPath or Inter-Tel. 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, it means that 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.



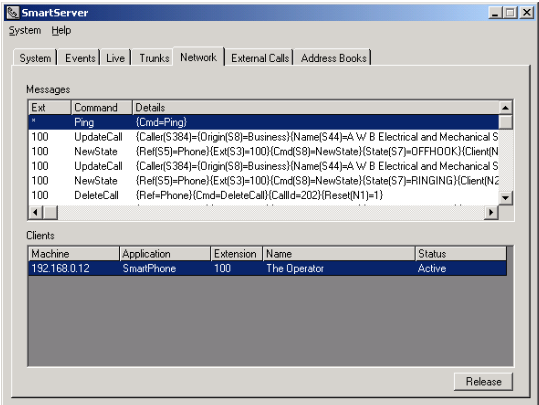
Network

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.

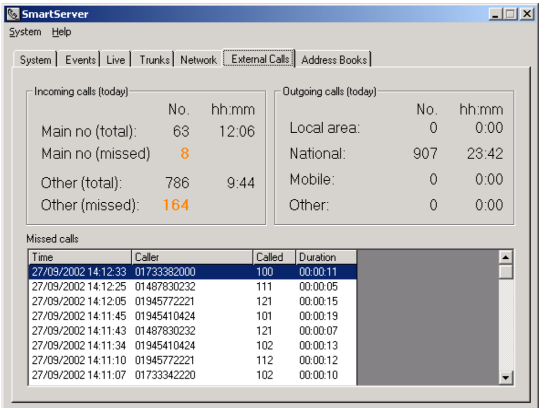
The **Clients** grid lists all the computers that are logged in to SmartServer. It shows their IP address, the application they are using to log in (e.g. SmartPhone), the extension number they are logged in as, the name of the extension number they are logged in as and their status.

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) and their hit rate – the percentage of incoming/outgoing telephone numbers that were found in that address book.

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).

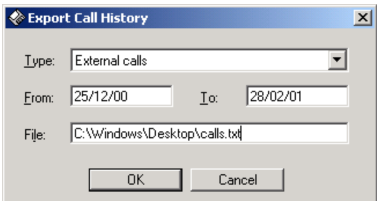
To export a call history to a tab-delimited text file, click **System**, **Export Call History**. The **Export Call History** window appears. On this window, select which types of calls to export from the **Type** drop-down list. You can select from either **All calls**, **Internal calls**, **External 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 recognised 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**, lets say that you want to have a list of all the external calls that were made/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 favourite 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 3 months old. 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.

SmartServer Configuration Guide

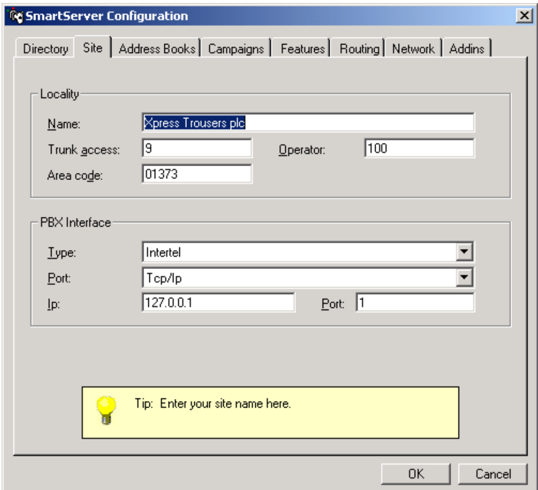
This document describes how to use the SmartServer Configuration program (also called SSConfig) to set up SmartServer to work with your telephone switch and computer network. You do not need to run SmartServer Configuration from the SmartServer computer; it may be run across your local area network. However SmartServer must be running whenever you try to use SmartServer Configuration, and if you want to set up an ODBC data source to use for an Address Book, you must create it on the SmartServer PC, and add the Address Book using SmartServer Configuration on the SmartServer PC.

To use SmartServer Configuration over a network, just install SmartServer Configuration on the machine you want to run it on and run it by clicking the **Start**, **Programs**, **SmartServer**, **SmartServer Configuration** program group item.

If you are running SmartServer Configuration on a machine other than the SmartServer computer, you will be presented with the **Login** screen and you must log in before you can do anything in SmartServer Configuration. Log in using one of the extension numbers and passwords that are set as an Administrator. If no extensions have been entered or set up as Administrator, you must first set an extension as an administrator by running SmartServer Configuration from the SmartServer machine.

Running SmartServer Configuration for the first time

The first time you run SmartServer Configuration, you will need to set it up to work with your switch (PBX).



Click the **Site** tab. In the **Name** box, enter the name you wish to use for this site. This is usually your company name.

In the **Trunk access** box, enter the number you dial to get an outside line. If your PBX is an NEC and uses non-standard Least Cost Routing codes, please contact Tiger Software and we will advise you how to set up the system so that it works correctly with LCR.

Enter the extension number or group number of the operator/reception desk in **Operator**.

In the **Area code** box, enter the local area code of the town you are in. This number will be used when performing calculations on how many local calls have been made, as well as being automatically inserted in front of any local telephone numbers so that the display of numbers is consistent.

In the **Type** dropdown list, select the PBX type you are connecting to: either **Hicom CSTA** for any Siemens HiCom or HiPath system, **Intertel** if connecting to an Inter-Tel Axxess, or **Tapi** if connecting to a PBX using

3rd Party TAPI drivers. Select **Not used** only if you are not connecting to a PBX (for instance because you are using 1st Party TAPI only).

If you selected a switch other than **Not used** or **Tapi**, you will need to select a port from the **Port** drop-down list. This will usually be Com1 or Com2. If you are connecting via TCP/IP instead of via a serial connection, select **Tcp/Ip**.

NB If you need to use a password to connect to the PBX, and the password has been changed from the default password, please contact Tiger Software and we will help you to enter the correct password into the system.

If you are not sure which Com port to use, start from the top of the list and work your way down it trying each port, and reloading SmartServer until you find the one that works.

For Serial connections, enter the Com port settings in the **Settings** box. Unless you know your system is different, you may leave these at their default settings. Your switch maintainer should be able to tell you what serial port settings to use. The port settings are described below.

For TCP/IP connections, enter the IP address of the switch in the **Ip** box, and the port number the switch is listening for connections on in the **Port** box.

SmartServer will now be configured to communicate correctly with your PBX. Continue reading this section to find out how to set up Address Books and Extensions etc using SmartServer Configuration.

Com port settings

The **Settings** box on the **Site** tab of SmartServer Configuration is used to tell SmartServer what settings to use to communicate through the selected port with the PBX. The settings for Com ports are made up of four comma-separated values.

The first value is the baud rate of the Com port (measured in bits per second). Valid values for this setting are: 110, 300, 1200, 2400, 9600, 19200, 38400, 56000, and 128000. This must be set the same as your switch baud rate or you risk needing to reboot your switch. This is usually 9600 or 19200.

The second value is the parity checking to use. You may choose between using Even (E), Odd (O), None (N), Mark (M), or Space (S). Again, this should be the same as your PBX setting. This is usually N.

The third value is the number of data bits to use. This can be 4, 5, 6, 7, or 8. This will normally never change. It is usually 8.

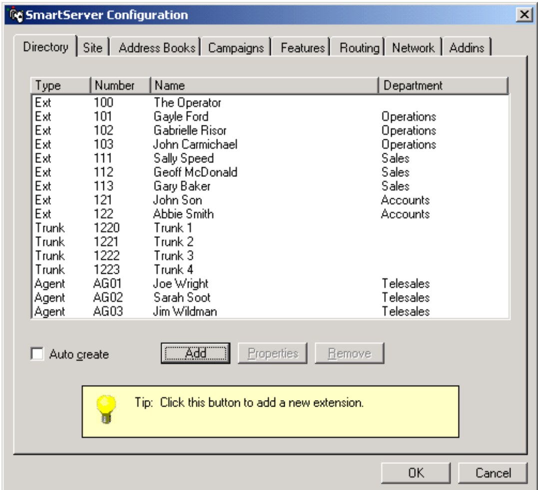
The last value is the number of stop bits. This can be 1, 1.5, or 2. This should also never need changing. It should be 1.

The settings that you choose here should always match with the settings that your switch is using. If you are not sure which settings your switch uses, consult your telephone dealer – although the default SmartServer settings will normally be correct.

Setting up Extensions and Trunks

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.

To do this, click the **Directory** tab and click the **Add** button. On the **Extension Properties** window that appears, choose what sort of extension you are adding (**Trunk** or **Extension**). To find out about adding Agents, please see the section below entitled Setting up Agents.



NB On most TAPI switches, there is no need to add trunks, and on the Inter-Tel, you do not need to enter all the trunks, just the main trunk group number (if you know it).

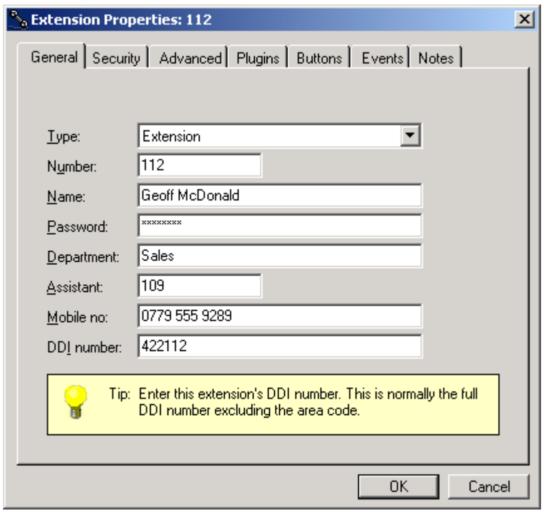
Enter the number of the extension or trunk in the **Number** box and the name of the extension or trunk in the **Name** box.

If you are adding a trunk, 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.

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 **Department** box, enter the department this extension is in. Department names are used to organize extensions into loose groups in SmartPhone and SmartOperator etc.
- 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 without the area code (the number that people would dial if they wished to speak to this extension directly, rather than calling the company's main switchboard number).
- On the **Security** tab, select the security settings that are appropriate for this extension (used in SmartPhone 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 **Plugins** tab, place a checkmark beside the Plugins you would like this extension to use and configure the Plugins by clicking the **Edit** button. Plugins are described in the document entitled Getting More Out Of SmartPhone.
- 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.



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 extensions that need 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.

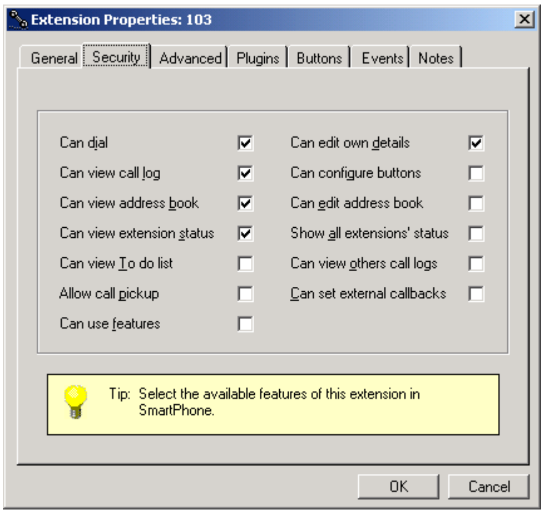
If you are editing the properties of more than one extension at the same time, the title of the **Extension Properties** window will change from **Extension Properties: <extension number>** to **Extension Properties: (<n> exts)** where **<extension number>** is the number of the single extension you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

If you wish, check the **Auto create** box to automatically create new extensions as SmartServer discovers them. On some PBXs, SmartServer is able to download a list of extensions along with names direct from the telephone system. On TAPI switches you should enable this feature, restart SmartServer, and then edit the extensions that have been automatically created by SmartServer so that they have the security settings you desire.

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 extension(s) 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 extension(s) 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 user(s) to view the **Address Book** screen in SmartPhone. This feature is on by default.
Can view extension status – this feature enables the selected user(s) to view the **Extension Status** screen in SmartPhone etc. This feature is on by default.
Can view To do list – tick this to enable user(s) to view the **To do list** in SmartPhone.
Allow call pickup – when ticked, the selected extension(s) can directly answer other user's calls by clicking on **Pickup** from the **Extension Status** screen.
Can use features – lets the selected user(s) 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 user(s) can edit the buttons that appear on their **Phone** window in SmartPhone.
Can edit address book – if ticked, the selected extension(s) are able to edit records in, add records to, and remove records from the internal SmartPhone Address Book.
Show all extensions' status – enables the selected user(s) 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 extension(s) can view the **Call History** screens of other extensions. This feature also enables the selected extension(s) to view the **Call History** screens of contacts in your Address Books.
Can set external callbacks – ticking this enables the user(s) to set External Callbacks on contacts and to view the External Callbacks other SmartPhone users have set.

Advanced Settings

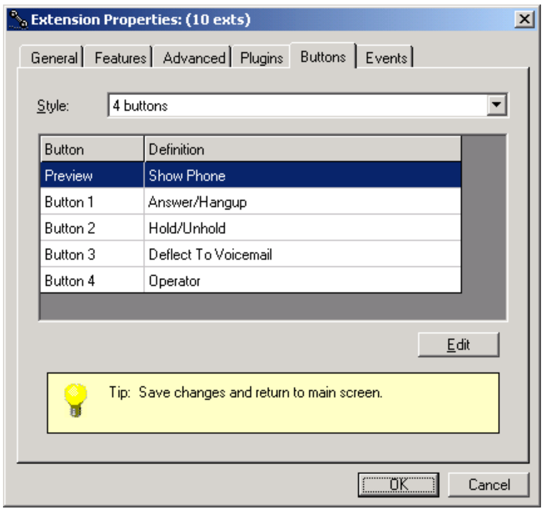
The following settings are available from the **Advanced** tab of the **Extension Properties** window. They are all off by default for new extensions:

Exclude from extension status – prevents the selected extension(s) 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 analysing 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 organisation and display the statistics on SmartServer's **External Calls** tab.
Keep call details private – turn on to keep the selected extension(s) 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, confidential calls.
Do not monitor – stops SmartServer from monitoring the selected extension(s).
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, anybody will be able to administer SmartServer.

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.

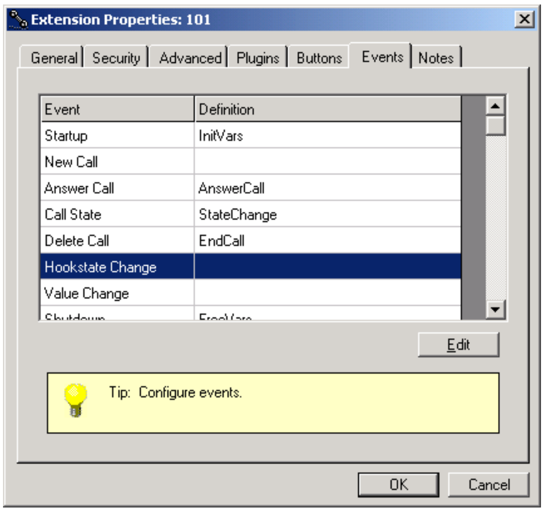
Events

In SmartPhone, certain scripts can be set to run when certain things happen. To set up these scripts, use the **Events** tab of the **Extension Properties** window.

The list of events that you can set scripts 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 that you want executed from the **Type** drop-down list. Finally, click **OK** on the **Edit Event** window to save the new event.



Setting up Agents

The ability to create Agents in SmartServer Configuration will only be useful if you have 1 or more SmartCampaign licenses on your system. Agents are like virtual extensions that can log in to SmartCampaign using their own id and password no matter which telephone extension they are situated at.

Adding, removing, and editing agents is done in much the same way as you would extensions and trunks. To add an agent, load SmartServer Configuration, go to the **Directory** tab, and click the **Add** button.

From the **Type** dropdown list, select **Agent**.

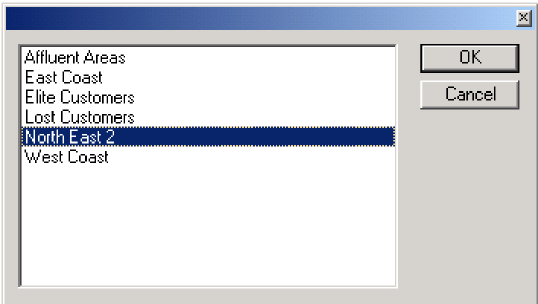
Enter an id for the agent in the **Number** box (this does not have to be a number, however it cannot be more than 6 characters long and it should be unique. Tiger Software recommend using the format **AG<nn>**, where <**nn>** is a unique integer, which could range from 01 to 99.

Enter the agent's name in the **Name** box, their department in the **Department** box, and optionally a password, which they will need when logging onto SmartCampaign in the **Password** box.

If you wish, you may leave the other boxes blank, or you can enter the information as you did when you were adding Extensions.

On the **Security** tab put a tick next to the features you would like the agent to have access to. The options available are the same as for Extensions.

On the **Campaigns** tab is a list of all the campaigns that have been assigned to the selected agent. Each 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 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**.

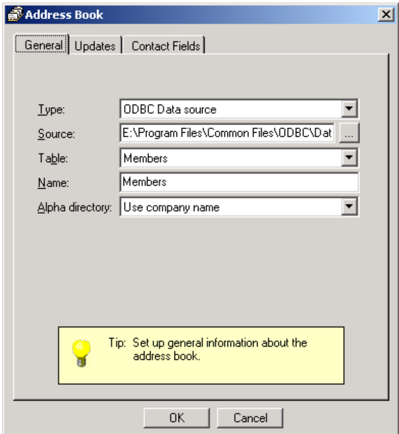
On the **Notes** tab of the **Extension Properties** window, you may enter an administrative note for the agent. This can be any text and is not important to SmartServer.

When you are finished editing the agent's properties, click **OK**. Like when you add extensions, the **Extension Properties** window will not close, it will clear enabling you to add more agents without having to click the **Add** button again.

As with extensions and trunks, to edit the properties of agents, or to remove agents, highlight them and click the relevant button – either **Properties** or **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 **Address Book** window will open.



On this window, choose the type of database to use from the **Type** drop-down list.

If you chose **ODBC Data source**, proceed as below:

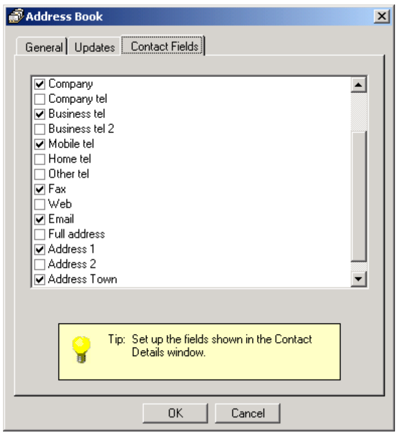
- Next to the **Source** box click the ellipsis (**...**) button to choose which database to use (to create a new ODBC data source, see the section **Specifying a New ODBC Data Source** below).
- From the **Table** drop-down list, select the table from the selected data source that contains the telephone numbers/names.
- Choose a display name for the address book and enter it in the **Name** box.
- Select whether to show the alphabetical index on the SmartPhone **Address Book** screen from the **Alpha directory** drop-down list.
- On the **Updates** tab, choose whether to use the address book live (by selecting **Use contacts live**) or whether to import the contacts at given time intervals (by selecting **Import contacts**). If you choose to use the database live, you can select **Use fuzzy matching for telephone numbers** to not use punctuation like **(**'s or spaces while searching from the **Address Book** screen. If you select to import contacts, you have to decide whether to update the address book every day at a certain time (by entering a number between **0** and **23** in the **Import daily at...** box) or whether to update the address book every so many hours (by entering a number in the **Import every... hours** box).
- On the **Contact Fields** tab, choose which fields in the selected table correspond to which fields in SmartPhone's **Address Book** window. You do not need to enter all of this information. However, it is recommended you choose a Unique Id field, as well as name and number. If you have custom fields that you would like to map, click **Add**. To remove custom information, click **Remove**.

If you chose **Microsoft Outlook Contacts** or **Novell GroupWise Address Book**, proceed as below:

- In the **Login** box, enter the name of the user to log in as (for GroupWise) or the profile to use (for Outlook). No password is required.
- In the **Folder** box, enter the name of the folder to use, for instance, Contacts
- In the **Name** box, enter the name to use for this Address Book.
- In the **Alpha directory** drop-down list, choose whether to show the alphabetical index on SmartPhone's **Address Book** screen or not.
- On the **Updates** tab, choose how often to update the address book, either entering a number in the **Import daily at...** box to update it every day at the same time, or by entering a number in the **Import every... hours** box to update the address book every so many hours.
- On the **Contact Fields** tab, check the fields you would like to be shown in SmartPhone. You can only view a maximum of 13 fields on the **Contact Details** window.

If you chose **Lotus Notes Address Book** from the **Type** dropdown list, proceed as below:

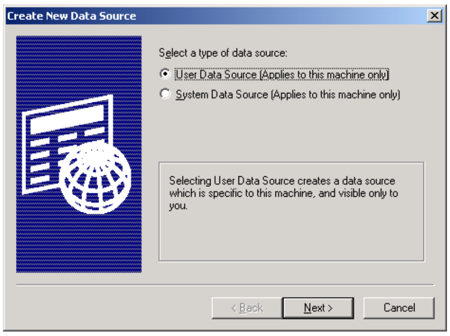
- In the **Server** box, enter the name of the Lotus Notes or Domino server computer.
- In the **Database** box, enter the name of the Lotus Notes database to use.
- In the **Name** box, enter the name you wish to give this address book.
- From the **Alpha directory** dropdown list, select either **(None)** to not use the alphabetical index down the side of the **Address Book** window, or select **Use surname** to use the alphabetical index by contact surname, or select **Use company name** to use the alphabetical index by contact company name.
- On the **Updates** tab, enter a number either in the **Import daily at…** or **Import every… hours** box to make the address book update itself every day at a certain time or every so many hours.
- On the **Contact Fields** tab, select up to 13 fields that you want to show on the **Contact Details** window.



Specifying a New ODBC Data Source

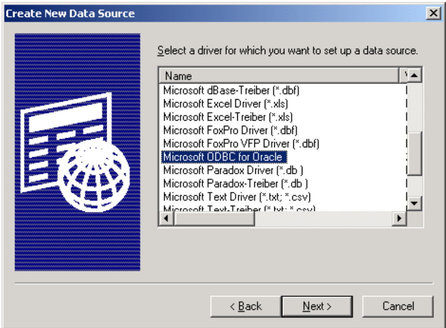
If you want to use a database as a SmartServer Address Book that doesn't have an ODBC connection, you will need to create a new ODBC connection to the database. To do this, on the **Select Data Source** window, press the **New** button.

NB The screen shots and procedures from this section describe adding a new ODBC connection on Windows 2000. Screens on your operating system may appear slightly different.

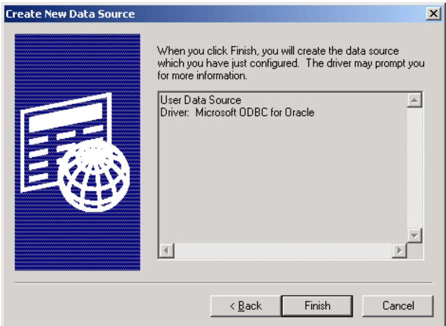


You will be asked which kind of source you wish to create: a User data source which is visible only to the currently logged on user or a System data source which is available to all user's of the machine.

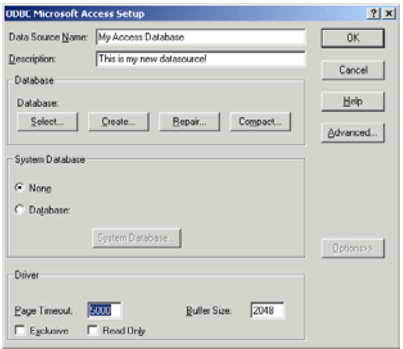
Make your choice and press **Next**. Now you must select what kind of data source you will be accessing.



If you are unsure, look at the extension of the file you wish to access and see if it matches any of the file suffixes shown on the **Create New Data Source** window (such as .mdb, .dbf, .xls, etc). When you have made your choice, press **Next**. You are shown a confirmation window to check that you have selected the correct driver.



Press the **Finish** button now to move on to the final stage. Here you will be shown a set up screen for your chosen driver. The layout of this window will vary greatly from driver to driver. Shown below is an example for a Microsoft Access database.

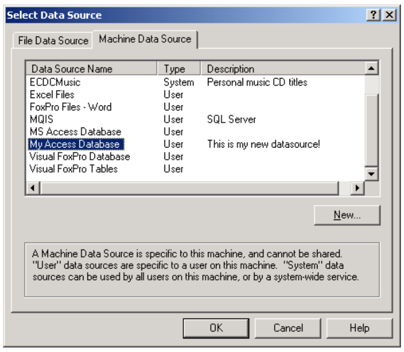


To finish setting up this Microsoft Access data source you must give it a name (and optionally a description) and select the database file. Enter a name in the field **Data Source Name**. If you wish, enter a description of the database in the **Description** window. Then, to select a database press the **Select** button (located underneath the word **Database**).

Locate your chosen file using the dialog box that appears and press **OK**.

NB For Microsoft Access data sources, there may be a bug in version 2.1 and above of the Microsoft Data Access Components which causes extensive network activity. You must ensure that Page Timeout is set to 5000 and not 5 milliseconds. For more information, see Microsoft Knowledge Base article **Q246560**

Then, back at the **ODBC Microsoft Access Setup** window press **OK** and you will return to the original **Select Data Source** window. Select the new data source you have created and press **OK** to add this data source as a SmartServer Address Book.



When you have finished entering all the information, click **OK**. You may add more address books by going through the above process again, remove address books by highlighting them and clicking **Remove** and edit address book options by highlighting the address book and clicking **Properties**.

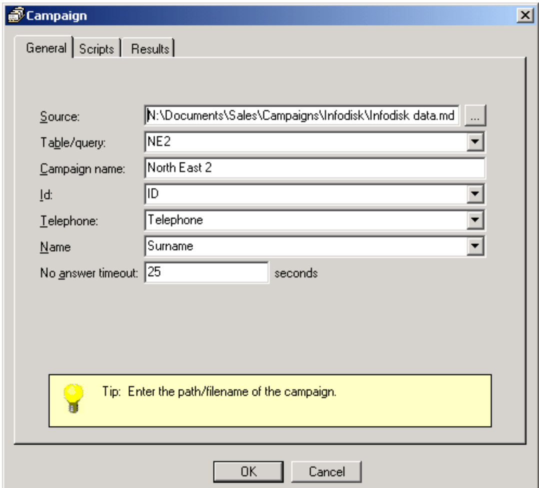
Campaigns

If you have purchased a SmartCampaign licence, 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. (Tiger Software 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 Tiger Software.



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. Tiger Software 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.

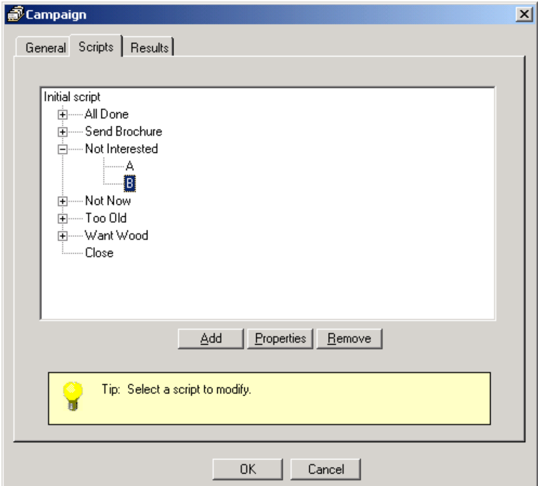
In the **Campaign name** box, enter a display name for the campaign. This value defaults to the same name as the table or query selected in the **Table/query** list.

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 dialled. 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 dialling 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.

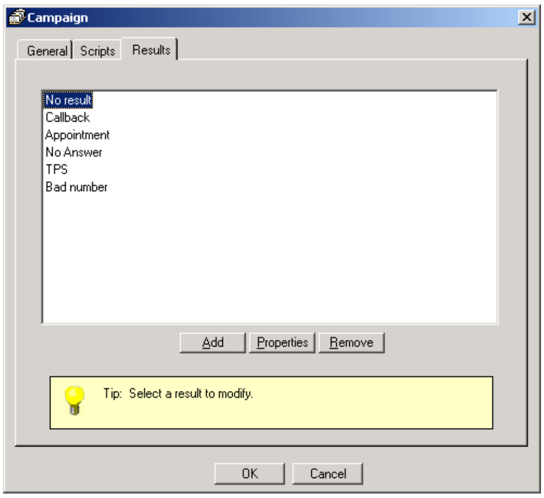
To remove a script, highlight it and click the **Remove** button. You cannot remove the Initial script. To edit the properties of a script, such as the HTML file to be used, highlight the script and click **Properties** (or just double-click the script in the tree).

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.

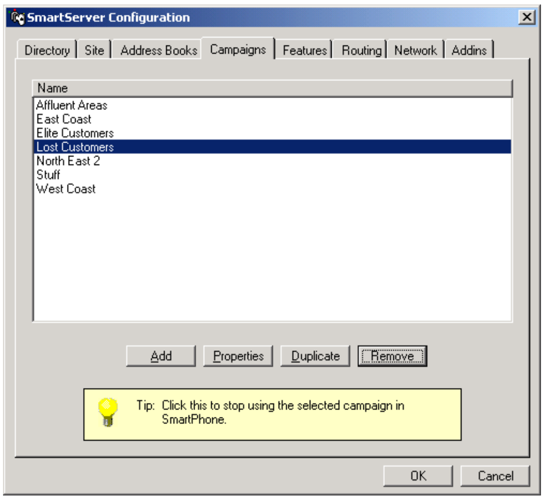
Once you have finished creating your campaign, click the **OK** button on the **Campaign** window. You may now assign the campaign to agents on the **Directory** tab to make them work your new campaign.

Duplicating Campaigns

Usually, Tiger Software 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**.

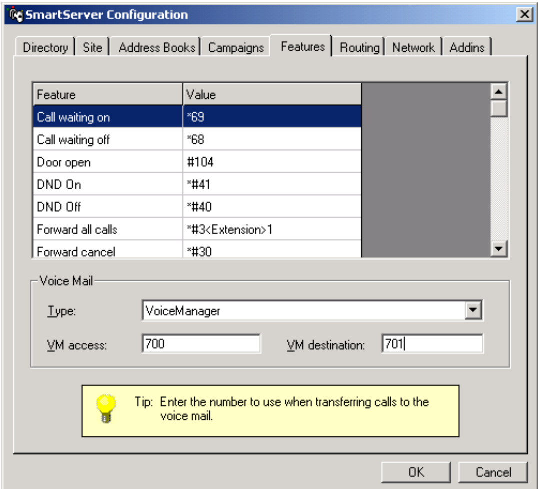


When you click **OK**, the **Campaign** window will close, and the configuration of the new campaign will be saved ready to be assigned to agents.

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.

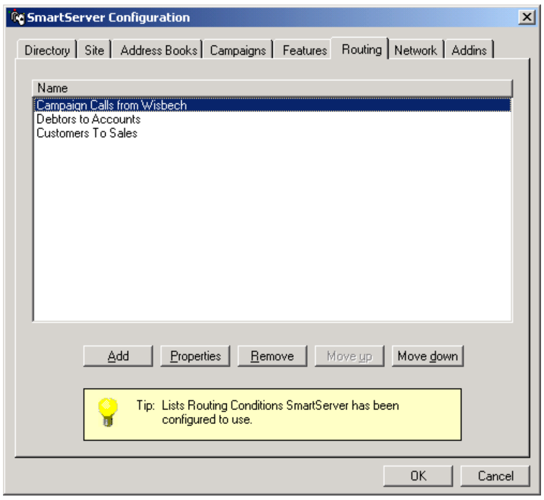
You can add codes for the following telephone system features:
Call waiting on/off – The beeping that lets you know that you have a call waiting
Door open – To activate the magnetic door release mechanism
DND on/off – The Do Not Disturb mode that makes an extension unavailable when people ring it
Forward 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 **VoiceManager** if you use Tiger Software's Voice Manager NT. Select **Phonexus** if your voice mail is a Phonexus system. Select **Generic External Voice Mail** if your voice mail is some other PC-based system. Select **Internal Voice Mail** if your voice mail system is built into the PBX.

In the **VM access** box, enter the number users dial when they wish to access their voice messages. In the **VM destination** box, enter the number users dial when they wish to leave a message for someone (for example if the receptionist wants to put a caller through to someone's voice mail).

Automated Call Routing

If you have obtained a Call Routing licence from Tiger Software, 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.

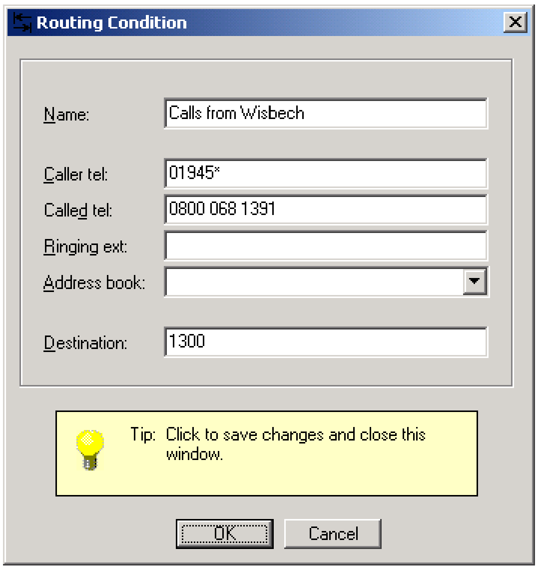
In the **Ringing ext** box, enter the extension that needs to be actually ringing when you want the rule to activate. You may include wildcards in the string. For example, to route calls that ring 5100, enter **5100** in the **Ringing ext** box. This box is different from the **Called tel** box in that the telephone that is ringing might not correspond to the number that was dialled – the telephone of the number that was dialled 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 an Address Books 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.

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.

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.

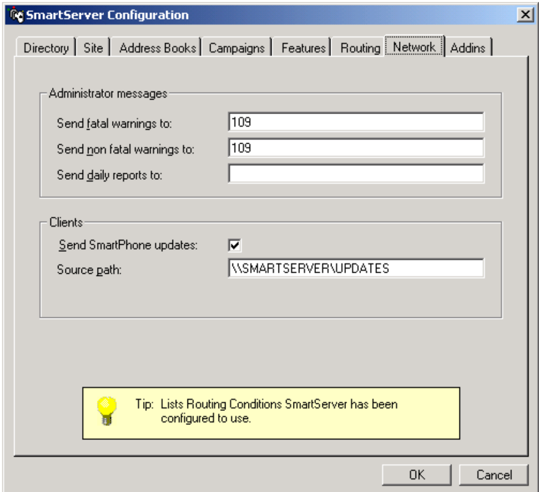


In the **Caller tel**, **Called tel**, and **Ringing ext** boxes on the **Routing Condition** window, you may enter multiple numbers separated by commas. So for instance to route calls from the 01480 area code and the 01595 area code, you would enter **01480*,01595*** in the **Caller tel** box.

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 SmartPhone updates to clients

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

There are 3 prerequisites to enabling automatic SmartPhone distribution:

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

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

The following steps are performed on the SmartServer machine:

1. Unload the SmartPhone client (if it is loaded)
2. Copy the new **SmartPhone.exe** file to the directory SmartPhone was originally installed to (usually **C:\Program Files\SmartPhone**)
3. Load SmartPhone (from the **Start Menu/Programs/SmartPhone** group)
4. Make sure the updated **SmartPhone.exe** 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 **SmartPhone.exe** 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 SmartPhone they will be informed that an update is available, and the new version will be downloaded from the SmartServer machine and installed for them.

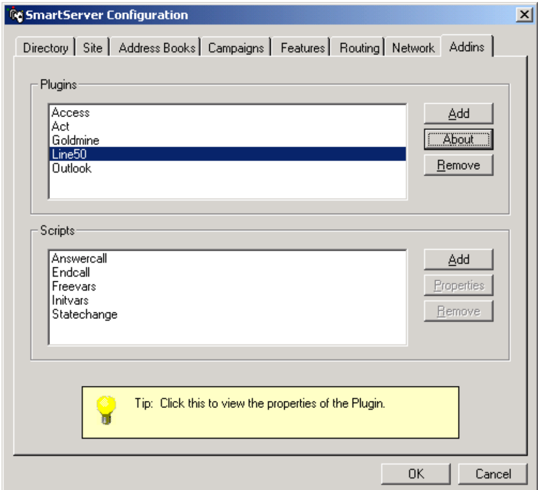
Using Plugins

Plugins are small code libraries written and produced by Tiger Software that make it possible for SmartPhone to integrate fully with different desktop applications such as Sage or Goldmine etc.

Using Scripts, SmartPhone only has limited control over the applications. However, utilising Plugins, SmartPhone can more comprehensively control these applications than could be done using Scripts. To use a Plugin, first you need to obtain it from Tiger Software. An up-to-date list of Plugin-enabled applications is available from Tiger Software or your dealer.

When Tiger Software issue you with a Plugin file, they may also give you an Authorization Code which needs entering into the SmartServer in order for the Plugin to be work. See the Licensing SmartServer section for further details.

Once you have got your Plugin file and saved it onto the SmartServer computer somewhere, go to the **Addins** tab of SmartServer Configuration, and press the top **Add** button (in the Plugins area of the tab). Browse to where you previously saved the Plugin (usually the SmartServer program directory), highlight it, and click **Open**. This will add the Plugin to the list of available Plugins.



To view the details of a Plugin, select it from the list and click **About**. To remove the Plugin, click **Remove**.

To enable a client to use the new Plugin, you will need to highlight the extension from the list on the **Directory** tab and click **Properties**, then go to the **Plugins** tab of the **Extension Properties** window and place a checkmark in the box next to the Plugin you want the user to be able to use. You might also want to configure the Plugin for your user by highlighting it and clicking the **Edit** button. Configuration options differ from Plugin to Plugin but are mostly just a case of selecting a file, table, and fields. For more help on configuring a particular Plugin, please contact Tiger Software.

Scripts

Scripts are used by SmartPhone 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 SmartPhone users desktop.

Normally, you would get Tiger Software to write any custom scripts you need, however, if you want, you can write the script yourself using the VBScript programming language.

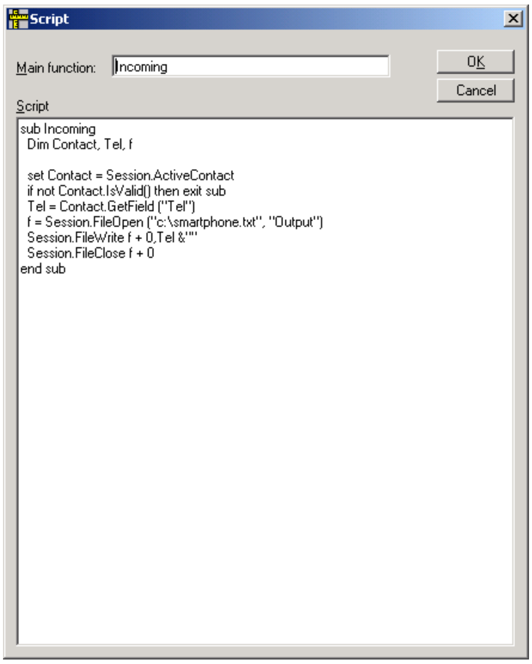
To add a script to SmartServer, click the **Add** button on the **Scripts** tab of SmartServer Configuration. A new window will appear. In this window, enter a descriptive name for the script in the **Main function** box. Then, in the large **Script** text box, either key in the code directly, or copy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

The code must always begin with **Sub <name>** where **<name>** is the same name as the one in the **Main function** box. And the code must end with **End Sub**.

When you are finished, click **OK**. The script will be saved and when SmartPhone 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.



SmartServer Frequently Asked Questions

Contents

Part 1: General

How do I restart SmartServer?

Close SmartServer and then load it back up again by clicking **Start**, pointing to **Programs**, pointing to **SmartServer**, and selecting the **SmartServer** item.

How do I know how many SmartPhone clients are connected to SmartServer?

On the **System** tab, in the Network information box there is a **No of clients** label. The number is the number of clients currently connected to SmartServer along with the total number of licenses you have. Also, on the **Network** tab all the clients are listed along with their IP address or machine name, extension number, name, status, and which client they are using e.g. SmartPhone or SmartOperator.

Can I tell how long it is taking to resolve telephone numbers?

Yes. On the **System** tab, look in the Network information box. There is an **Ave lookup speed** label. This label displays the average time in seconds of the last five telephone number resolutions.

Where can I see a list of current calls?

On the **Live** tab, in the **Calls in progress** grid you can see the call ID, the start time of the call, the caller telephone number, the called telephone number, the last known state of the call and all the participants involved in the call (useful for conference call information).

Can I view the status of all the extensions on the telephone network?

Yes. On the same tab as above (the **Live** tab) there is an **Extensions** grid. This grid lists all the extensions you set up in SmartServer Configuration and shows their number, name, department, state, and calls they are currently involved in.

Can I monitor trunk usage to see if I need more trunks?

Yes. Look on the **Trunks** tab. On the chart (updated every minute) is the maximum and minimum number of trunks used in that minute. In the box next to the chart, there is also trunk usage information for the last hour and last day. If the maximum number of trunk lines being used is often the same as the number of trunk lines you have installed, you may wish to consider buying more trunk lines from your telephone dealer. The Trunks tab is only visible if you have entered trunks into SmartServer Configuration, and may not be accurate on all TAPI switches. Please check with Tiger Software.

How do I know who is using SmartPhone?

You can tell which extensions are logged on to SmartPhone by going to the **Network** tab and looking at the **Clients** grid. This grid shows all the SmartPhone clients currently logged in along with the extension number, name, and application of each client. Alternatively, the **Clients** grid also shows the IP address of clients. You can use this to determine which computer people are logging onto SmartPhone and SmartOperator with.

Is there a list of missed calls I can view?

There is a list of missed external calls available on the **External Calls** tab of SmartServer. The list shows the date/time of each call, each caller's telephone number, each extension called, and the duration of each call (how long it rang for).

The missed calls list for a particular extension can be seen using SmartPhone's **Call History** screen, or by creating a report with SmartReports.

Is there a list of unknown callers I can view?

The unknown callers list for all monitored extensions is displayed on the **Address Books** tab of SmartServer. This list shows the date/time of each call, as well as the telephone number, town, type, and extension number of the calls.

Can I view statistics about calls, like average calls per day etc.?

There are a number of options available to you. You can view trunk usage statistics - as described above - on the **Trunks** tab. You can view total calls and total durations of calls for different types of call like inbound calls; missed calls; and outbound local, national, mobile, and other calls by looking on the **External Calls** tab of SmartServer.

You can buy the SmartReports package from Tiger Software, which enables you to create historical graphical reports and tables of calls and call durations etc.

There is also a SmartMonitor module available, which lets you view data updated live in tables and charts. You can choose which extensions to monitor and set alarms if values become to low or high. The sorts of data available include active time, call length, keyboard activity etc. This module is ideal for easy call centre management.

Part 2: Configuration

How do I configure SmartServer?

You can load the SmartServer Configuration program by clicking the **System**/**Configure** menu item, or by clicking **Start**, **Programs**, **SmartServer**, **SmartServer Configuration**. Configuring SmartServer is discussed in the document: SmartServer Configuration Guide, available from the Tiger Software web site: www.tiger-software.com.

How can I find out what hardware settings SmartServer is using?

Either look on the **Site** tab of SmartServer Configuration, or look in the **Hardware** box on the **System** tab of the main SmartServer window.

How do I add extensions to the directory?

Open SmartServer Configuration, go to the **Directory** tab, and click the **Add** button. Enter the relevant information and click **OK**. The information will be saved and the **Extension Properties** window will reset enabling you to add more extensions. If you want to add more extensions, do so clicking **OK** after each one. When you are finished, click **Cancel** and the **Extension Properties** window will close. After adding extensions, you must restart SmartServer before the new extensions will be monitored. Alternatively, you can tick the **Auto create** feature and SmartServer will attempt to download extensions from your PBX, or if it can't, it will learn about new extensions as they make and receive calls.

How do I remove extensions from the directory?

In SmartServer Configuration, highlight the extensions you would like to remove from the **Directory** tab and click **Remove**. After removing extensions, SmartServer needs to be restarted in order for the extensions to stop being monitored. If possible, restart SmartServer when no SmartPhone clients are logged in.

If you do not wish to remove an extension from the directory, but no longer wish the extension to be monitored, you can select **Do not monitor** from the **Advanced** tab of the **Extension Properties** screen on SmartServer Configuration.

How do I change an extension's privileges?

In SmartServer Configuration, highlight the extensions that you wish to edit and click **Properties**. Go to the **Security** tab and check or uncheck the privileges as necessary. When you click **OK**, the new properties will be saved. Any changed privileges made to an extension will take effect the next time the extension logs in to SmartPhone.

How do I change an extension's name / number / department / password?

You can do this from the **SmartPhone Configuration** window, or by using **Extension Properties** from SmartServer Configuration.

How do I change the hardware settings SmartServer uses?

Open SmartServer Configuration, click the **Site** tab, and change the details in the bottom half of the window (**Type**, **Port**, **Settings**). The hardware settings are described in detail in the SmartServer Configuration Guide, available from the Tiger Software web site: www.tiger-software.com.

How do I add and remove Address Books?

To remove Address Books, in SmartServer Configuration, on the **Address Books** tab, highlight the Address Books you want removed and click **Remove**. When you remove an Address Book, it stops being used in SmartServer and SmartPhone immediately.

To add an Address Book, on the same tab of SmartServer Configuration, click **Add**. Enter the required settings on the **General** tab, choose which fields to display on the **Contact Fields** tab and click **OK**. Adding Address Books is described in more detail in the SmartServer Configuration Guide, available from the Tiger Software web site: www.tiger-software.com.

How do I change an Address Book's properties?

Highlight the required Address Book and click **Properties** on the **Address Books** tab of SmartServer Configuration. Any changes you make to an Address Book will take effect when you click **OK** in the **Address Book** window.

Part 3: Licenses

How do I license SmartServer?

To license SmartServer, you need to decide how many and what sort of clients you would like to be able to use with it, and obtain the appropriate license from Tiger Software. You can purchase licenses by emailing (sales@tiger-software.com) or telephoning (+44 (0) 1733 866500). Or if you bought SmartServer from your telephone dealer, you may purchase additional licenses from them.

How long can I use SmartServer before I need to license it?

SmartServer will work for a period of thirty days with a maximum of five SmartPhone client connections without a license. This is so that you can test SmartServer before obtaining a license. After this period, SmartServer will stop working until you get a valid Authorization Code.

Where do I get an authorization code for SmartServer?

You get a unique authorization code for SmartServer when you obtain a license for it from Tiger Software. When you buy a license, you will tell Tiger Software what sort of license you would like, and the 24-character **Hardware Code** found on the **Help**/**Licensing** window of SmartServer. Tiger Software will then give you a 24-character authorization code to enter in the **Help**/**Licensing** window.

Part 4: Troubleshooting

Why has SmartServer stopped working?

SmartServer requires certain system information in order to run correctly. SmartServer obtains this information when it is first run and checks it every time it starts subsequently. Unfortunately, this information is different in every computer. Therefore, changing the computer you run SmartServer on (or changing the hardware in the computer) can cause SmartServer to stop working. You should not make copies of SmartServer to be run on different computers. Please contact Tiger Software with the displayed error message for further assistance.

Why does SmartServer Configuration not load?

SmartServer Configuration checks SmartServer is loaded before it starts. If SmartServer Configuration is loaded before SmartServer, the splash screen will not disappear and SmartServer Configuration will not finish loading until SmartServer is loaded, or until you press **Cancel** (in which case SmartServer Configuration will exit). Also check that the computer you are running SmartServer Configuration on has a network connection to the SmartServer computer that it is trying to connect to.