Installation and Configuration Guide

Version 8.5

PhoneGuide LIVE! Installation and Configuration Guide

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1. Preparation

1.1. For the PhoneGuide LIVE! Installer

☑ You will need Adobe Acrobat reader on the server you will be installing the PhoneGuide LIVE! applications to read the PDF version of this documentation.

☑ Make sure Internet Explorer 7.0, 8.0 or 9.0 is installed on the PhoneGuide LIVE! server.

☑ Make sure Internet Information Services (IIS) is installed on the PhoneGuide LIVE! server.

☑ Make sure .NET Framework 3.5.1.is installed on the PhoneGuide LIVE! server. If using Windows 2008 Go to Server Manager and Roles check for ASP.NET is set to "Installed.

☑ Windows 2008 R2 need to "Start" the Application Pool for ASP .NET V2.0 Also "Enable 32-Bit Applications, this must be set to True. This is set in IIS Application Pool under Advance Settings.

☑ Confirm local user IUSR_[computername] exists and computername matches current computer name. If not, refer to section 3.5.5.1.

1.2. For the PhoneGuide LIVE! Administrator

☑ If you are using PhoneGuide LIVE! for an OpenScape Voice platform, before you begin installing PhoneGuide LIVE! to your server, you will need:

- The Server URL, User Name and Password for your OpenScape Voice Common Management Portal.

- The SIP Phone's Admin password and IP Port number.

- Note: It is critical that the PhoneGuide LIVE! server has network access to all SIP phones.

☑ If you are using PhoneGuide LIVE! for a HiPath 4000 platform, before you begin installing PhoneGuide LIVE! to your server, you will need:

- The IP addresses for your HiPath 4000 switch or switches or HiPath Manager.

- To make sure that XIE is activated on your HiPath 4000. If it is not activated, you will not be able to import from your HiPath 4000 to PhoneGuide LIVE!.

☑ If you are using PhoneGuide LIVE! for Xpressions training, before you begin installing PhoneGuide LIVE! to your server, you will need:

- Initial Password

- Direct Access (Internal)

- Direct Access (External)

- Guest Access (Forward/Transfer)

- Universal Access (Internal)

- Universal Access (External)

- Forward Access

- Transfer Access

- Callback Access (Internal)

- Callback Access (Trusted)

☑ You will need to activate PhoneGuide LIVE! before users may access it. You may either do this by registering your product online or with an activation key. If you choose to register your product, you will need an Internet connection for the server on which PhoneGuide LIVE! is installed. If you choose to not register your product, you may obtain your activation key by contacting Impact Technologies Customer Service at 314-743-1420, 8:30am – 5:00pm Monday through Friday, or at CustSvc@impacttech.com.

☑ You will also want to create at least one User Group when you configure PhoneGuide LIVE!, but you may want to create several groups per switch. If you are creating more than one User Group, you will need to know which members of your organization are going to be in which User Group. You will also want to know which phone and Voice Mail features to include for your users.

☑ Once PhoneGuide LIVE! is installed on your server, you will generate a URL to distribute to the users in your organization that will allow them to access and run PhoneGuide LIVE!.

1.3. For the PhoneGuide LIVE! Users

☑ Adobe Flash Player 8 or greater from Adobe. If your users do not have Flash 8 or higher installed, they will receive a link to download Flash when they try to access PhoneGuide LIVE! via the URL you supply them. If the link doesn't work, they may have to enable Active X settings on the Security tab of the Internet Explorer Properties window and try the URL again to try the download link again. They can also try to download Adobe Flash Player directly from this link, http://www.macromedia.com/go/getflash/, or if that doesn't work, they can go to www.adobe.com and refer to instructions there to download it. Also note that if your PhoneGuide LIVE! users have to install Adobe Flash Player, they will need to close and reopen their browsers before they can use PhoneGuide LIVE!.

☑ Acrobat Reader from Adobe (not required to run PhoneGuide LIVE! but included documents cannot be read without it)

☑ Internet Explorer 6.0, 7.0, 8.0 or 9.0

☑ Soundcard and speakers or headphones

1.4. Hardware Requirements and Custom Configurations

The configuration of the PhoneGuide LIVE! server depends on the number of switches you will use with PhoneGuide LIVE! and the number of simultaneous users you expect. Please refer to the PDF document entitled PhoneGuide LIVE! Configuration.pdf found in the Documents directory of your PhoneGuide LIVE! CD for configuration requirements.

For customers requiring custom configurations or who would like to consult with Impact Technologies to determine the optimum hardware and software configuration, contact Customer Service at 314-743-1420, 8:30am – 5:00pm Monday through Friday, or at CustSvc@impacttech.com

2. Installation

When you are ready to install PhoneGuide LIVE!, follow the instructions in the following section.

2.1. Installing PhoneGuide LIVE! on your Server

Insert PGL Disk 1 into your CD or DVD drive, to begin the installation you will need to run the **ItDatabaseServerSetUp.msi** or **ItDatabaseServerSetUp64.msi** (if installing on a 64 bit server) file on the PGL Disk 1CD.

Once the installation begins, the Installation Wizard window will display (not shown).

Click Next. The License Agreement window displays. After reading the license, accept the agreement to continue with the installation.

Click Next. The Database Server Setup window will display.
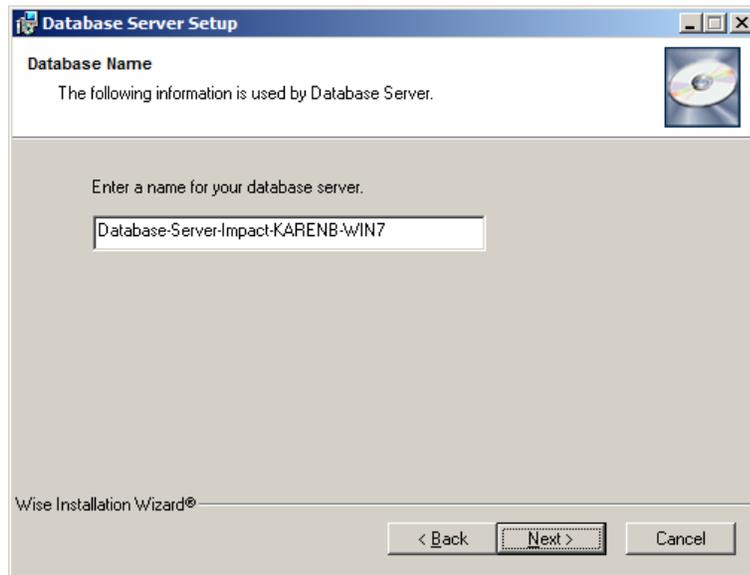
Destination Folder will contain the install files for PhoneGuide LIVE! It is recommended you select the default but if you choose to relocate the installation you can choose a new installation directory.

Click Next.

The installation will now install the database. When completed click Finish

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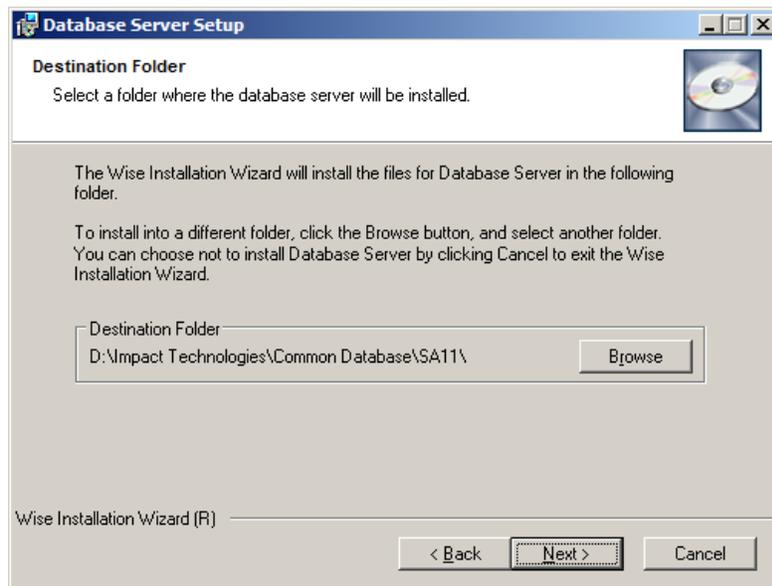
After the Database has completed you will now start the installation of the application. You will now run the **PhoneGuideLiveSetup.msi** file on the PGL Disk 1 CD

Once the installation begins, the Installation Wizard window will display (not shown).

Click Next. The License Agreement window displays. After reading the license, accept the agreement to continue with the installation. Click Next.

The Enter CD Key window displays.

Enter the CD key found in the PhoneGuide LIVE! CD packaging and click Next. Be sure to enter the CD key code exactly as it appears, including any dashes and matching any upper- or lower-case letters. It is case-sensitive.
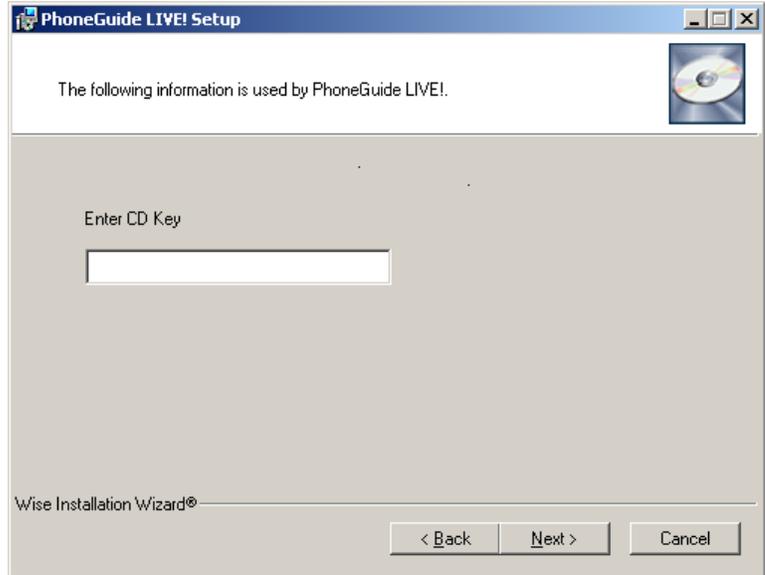
The User Information window will display. The Full Name and Organization fields should be auto-filled. Select the Anyone who uses this computer option and click Next.
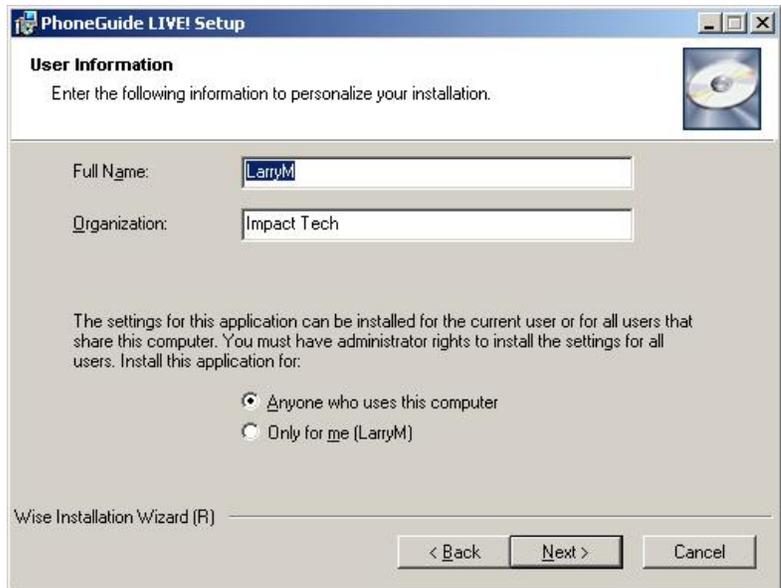
The Select Features window displays. The default selections for WebApplication, Administrator, and Database will install PhoneGuide LIVE! to the local hard drive. Currently, the drop-down selection lists to the right of each application are not functional.

If you want to install any of the PhoneGuide LIVE! components on a drive different than the default, select the component and then use the Browse button to select a different installation location.

Click Next after you make your selections or to accept the defaults.
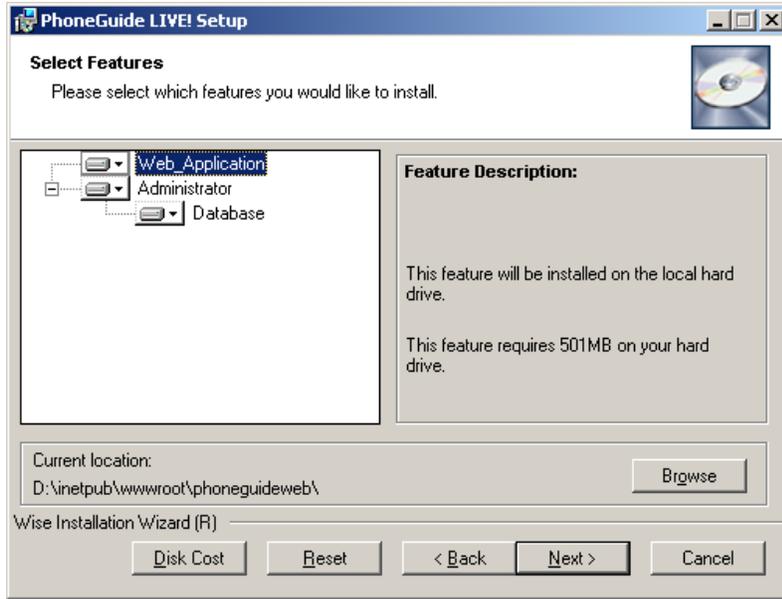
A new IP or Hostname of Database field displays. Currently, only localhost is supported. Click Next to accept the default.
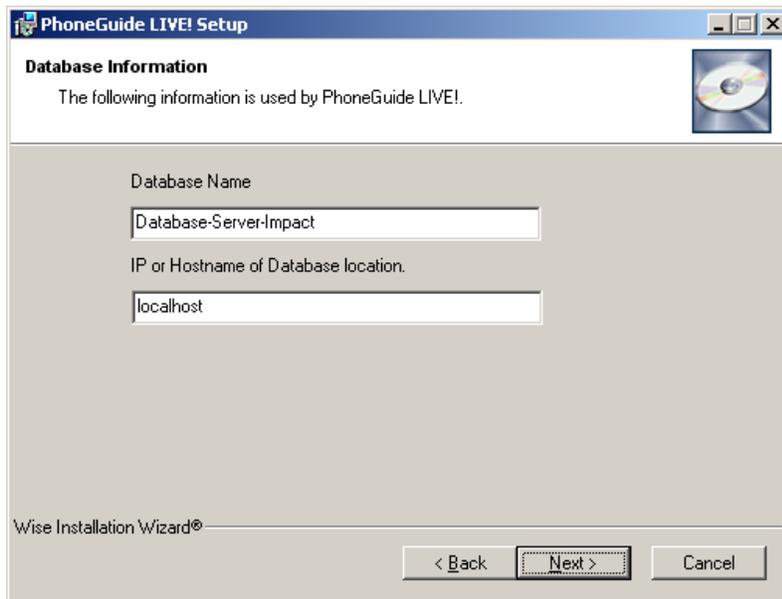
The Web Resources Configuration window displays (not shown). This window informs you that you are beginning a series of steps that will specify the location of the PhoneGuide LIVE! web application in Microsoft Internet Information Services on your server. Click Next to continue.

The New Virtual Directory window displays.

The Virtual Directory Name and Parent fields are used to specify the location of the PhoneGuide LIVE! web application in Microsoft Internet Information Service and are also used to define the URL that will allow access to PhoneGuide LIVE! You should accept the defaults (including the blank field for Virtual Directory Parent) in most cases. If you need to enter different information, please consult with your network administrator.

Click Next to accept the defaults.

The DNS Name or IP Address window displays. We recommend that you enter the DNS name of the server on which PhoneGuide LIVE! is being installed. Alternately, you can enter the IP address. Using a DNS name will let you avoid having to edit this information if the IP address changes in the future.

Click Next after you enter the DNS name or IP address.
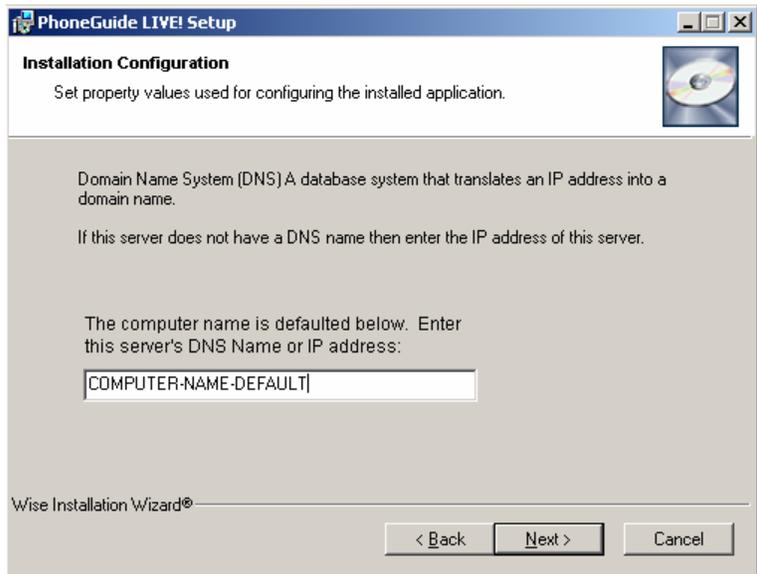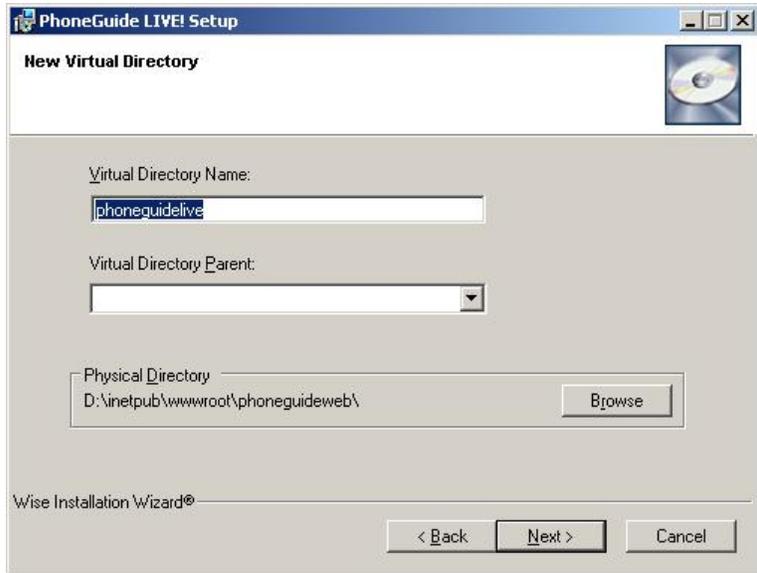
You are now ready to finish the installation. You may use the Back button to retrace these steps and change any information, or you may click Next and PhoneGuide LIVE! will finish installing itself.
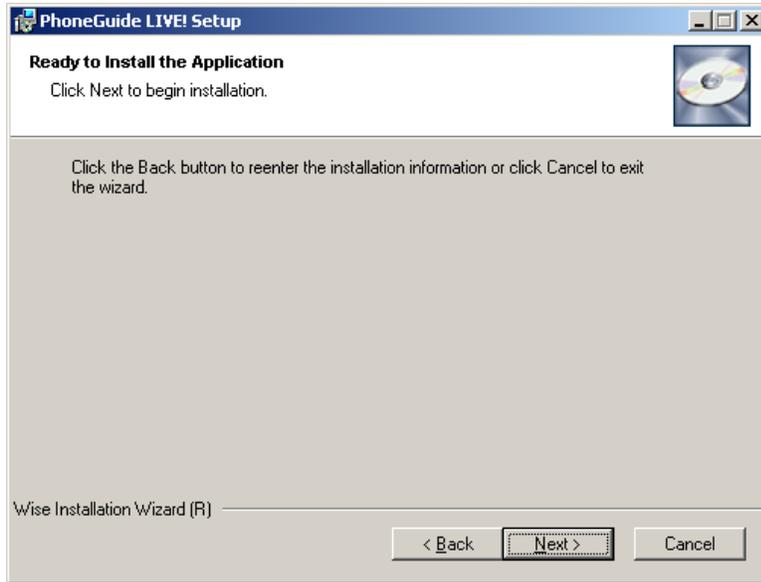
After clicking Next, the Updating System window displays. Please be patient. It may take several minutes before the installation is complete and the progress bar may not update initially as the installation process begins.
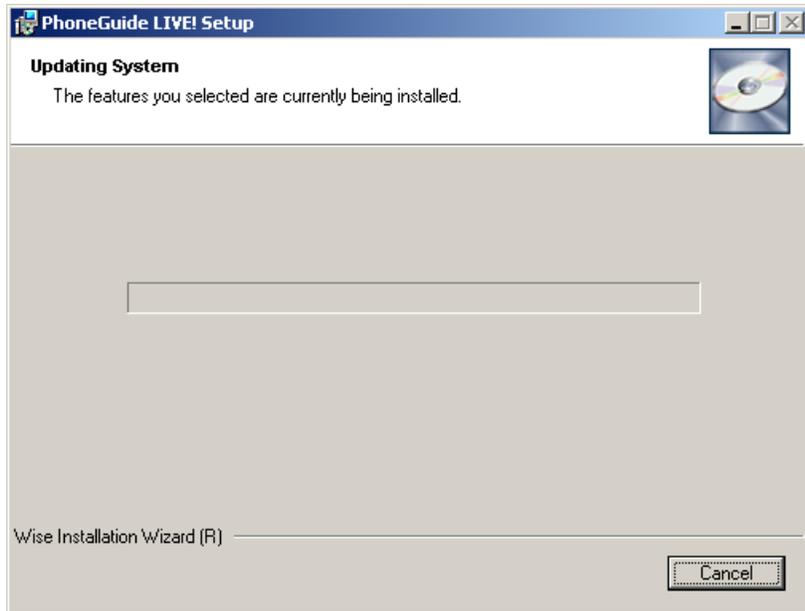
Part of the way through the installation process you will be prompted to insert PGL Disk 2. After you have inserted PGL Disk 2 into your CD or DVD drive, click OK to continue with the installation.

Shortly after, a similar window will display (not shown) prompting you to insert PGL Disk 3. After you have inserted PGL Disk 3 into your CD or DVD drive, click OK to continue with the installation.

When the installation is successfully completed, you will be asked to click the Finish button. If installing on a Windows 2003 server there are two more steps you need to perform before you are ready to run the PhoneGuide LIVE! Administrator. You will need to…

- Enable ASP.NET on the server
- Ensure that the .FLV files (the video training files) will stream properly

2.2.   Enabling ASP.NET on the Server

To enable ASP.NET, go to Control Panel and access the Administrative Tools options. Once there, select the Internet Information Systems (IIS) option. The following window displays.
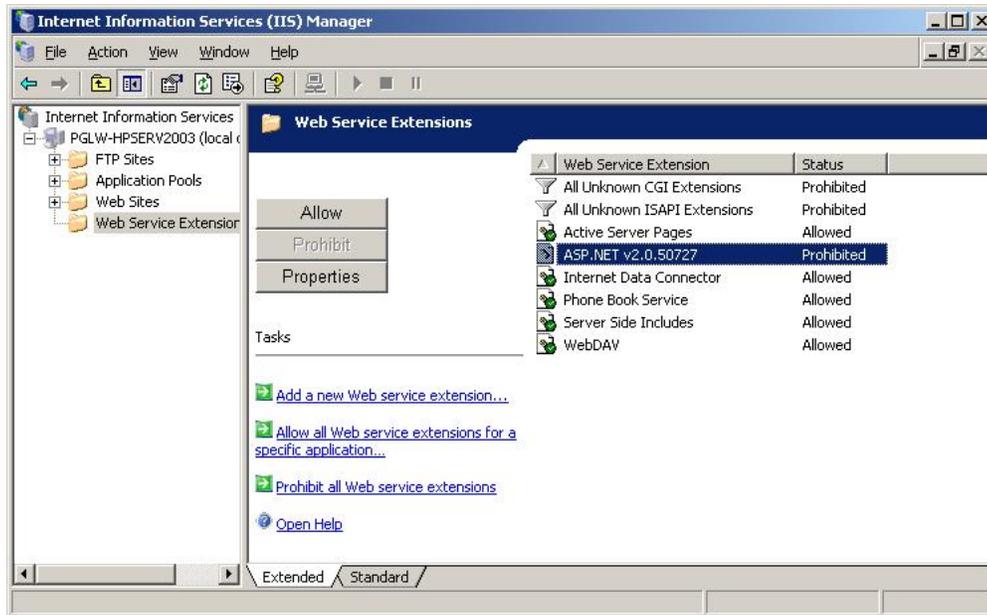
Select the Web Service Extension folder and then select the ASP option. Click the Allow button to allow ASP.NET to run. Also make sure that Server Side Includes option is allowed.

Note: If you are installing on a Windows 2000 Server, look for an ASP.NET tab on the Internet Information Services window. If you see a tab, ASP.NET is installed – just make sure it's v2.0. If you do not see a tab or it is not v2.0, you will need to install ASP.NET v2.0.

2.3.   Ensuring that the FLV Files Stream Properly

Macromedia Flash Player movie files that stream external FLV files (Flash videos) placed on a Microsoft Windows 2003 server will not stream. This is a known issue with Microsoft Windows and FLV files. Below is a workaround to remedy this issue. For more information, refer to your IIS documentation or see your network administrator.

1.   On the Windows 2003 server, open the Internet Information Services Manager.
2.   Right-click the local computer server and select Properties.
3.   Select the MIME Types tab.
4.   Click the New... button and enter the following information:
     o   Associated Extension box: **.FLV**
     o   MIME Type box: **flv-application/octet-stream**
5.   Click Ok to close the Associated Extension window and then click Ok again to close the MIME Types tab.
6.   **IMPORTANT! Restart the World Wide Web Publishing service. If you do not restart this service, the PhoneGuide LIVE! URL will not work for your users.** Go to the next section (2.4) for instructions on how to restart the World Wide Web Publishing service.

3.   Configuration

After you install PhoneGuide LIVE!, you need to configure it with your switch or switches before your organization can use it.

If you have an OpenScape Voice switch, you will configure PhoneGuide LIVE! to access the OpenScape Voice Common Management Portal to obtain IP addresses of for individual phones. PhoneGuide LIVE! will then retrieve phone information directly from each phone.

If you have a HiPath 4000 switch, you will configure PhoneGuide LIVE! to download phone information from that switch and which extension information to download.

If you have a HiPath 3000, you will configure PhoneGuide LIVE! to display information on phone types that work with the HiPath 3000.

For OpenScape Voice, HiPath 4000 and 3000 switches, you will also determine what kind of feature and voice mail help your users will be able to access via PhoneGuide LIVE!.

3.1.   Logging in to PhoneGuide LIVE! Administrator

After you install PhoneGuide LIVE!, you are ready to launch PhoneGuide LIVE! Administrator. Use the desktop icon or go to Start menu to launch it. The Login window will display:

The default User Name is: **phoneguide**.

The default Password is: **impact**.

Use these defaults to log in to PhoneGuide LIVE! Administrator. These are case-sensitive.

Please note that you can change this information after you log in or set up your own login. The System - Users option allows you to modify login information and set up new user accounts.
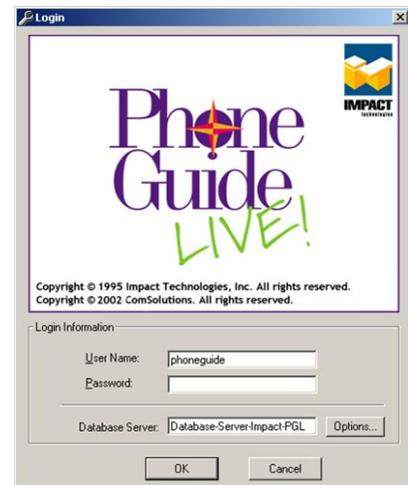
3.2.   Activating PhoneGuide LIVE!

After you install and log in to PhoneGuide LIVE!, you will need to activate it before you can import information from your switches. You can activate it in one of two ways:

- You can register the product online, which will activate it automatically

• You can contact Impact Technologies and receive an activation key

When you first start
PhoneGuide LIVE!
Administrator, you will see a
Register window. You can
register now, choose to do so
later, or choose to never
register.

If you choose to register now,
your system will launch a
browser and connect to Impact
Technologies' registration page.
PhoneGuide LIVE! will be
automatically activated during
the registration process.
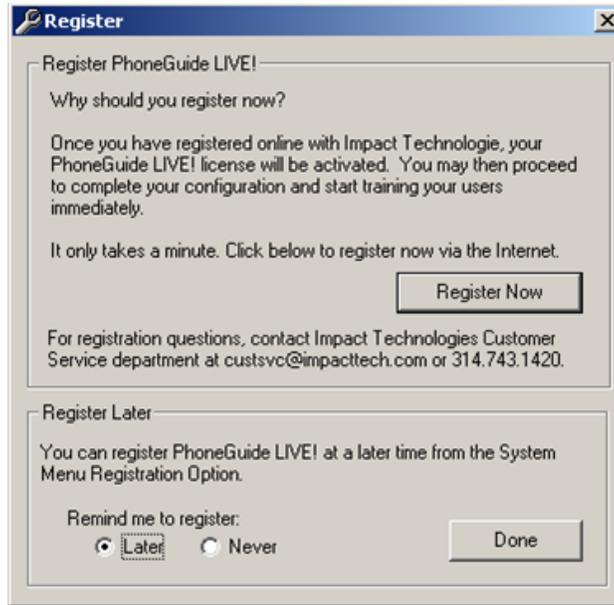
IMPORTANT! Once you begin the registration process, you have twenty minutes in which to
complete it. If you do not finish in time, you will have to start the registration process over. Select
the System – Registration/Upgrade option to attempt registration again.

The other way to activate PhoneGuide
LIVE! is to select the System – Update
Activation Key option. The following
window will display.

Contact Customer Service at Impact
Technologies to receive the activation
key to enter on this window.

3.3. Creating PhoneGuide LIVE! User Groups

User Groups allow you to define the PhoneGuide LIVE! video and text training help group
members can access. User Groups give you a way of simplifying PhoneGuide LIVE! for each
individual user. For example, you may create one User Group for users with access to ACD
features, and another User Group for users who do not have access to ACD features.

If you create more than one User Group, when users log into PhoneGuide LIVE! they may select
the User Group they wish to belong to. As a PhoneGuide LIVE! administrator, your role is to
create the appropriate User Groups and then make sure your users know which group to select.

If you are defining the <Default> User Group for an OpenScape Voice switch, your User Group
will include all phone numbers from business groups that do not have a specific User Group

defined for them. If you are defining a User Group for a specific Business Group, it will include all phone numbers for that business group. PhoneGuide LIVE! also offers phone templates for your OpenScape Voice users. OpenScape Voice users may log in with their complete telephone numbers (for international customers, this includes country code) or with the name of the phone template that corresponds to the type of phone they have on their desks.

If you are defining a User Group for a HiPath 4000 switch, you will assign a subset of phone extensions found on the switch to each User Group. Your User Group can correspond to all the extensions on the switch, or you can have more than one User Group per switch if you want. For example, you could have a Sales User Group and Customer Service User Group. Your HiPath 4000 users will log in with their extension numbers.

If you are defining a User Group for a HiPath 3000 switch, you will simply create the group. There are predefined phone templates for these users. Your HiPath 3000 users will log in with the name of the phone template that corresponds to the type of phone they have on their desk.

During the process of creating a User Group for the OpenScape Voice, HiPath 4000 and 3000 switches, you will select the video and text training features group members can access.

After you successfully log in, the PhoneGuide LIVE! Administrator window will display. The fields for User Group names, switch types, etc., will be empty.
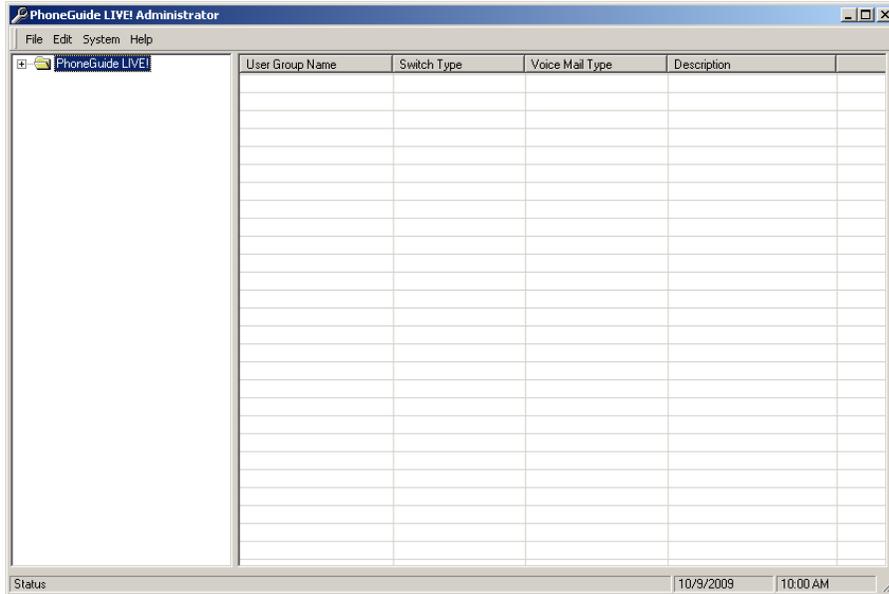
Select the New User Group option from the File menu. The User Group Wizard window will display.

In the User Group Identification areas, enter a name for your User Group and any description.

In the System Types area, select the Switch type for the User Group you are defining and the Voice Mail type as well. For the switch type, you can select a OpenScape Voice, a HiPath 4000, or a HiPath 3000.

When you define your Voice Mail system, you have four options: You can select Xpressions 4.0, Xpressions 5.0, Xpressions 6.0, Other, or None.

If you use Xpressions 4.0, 5.0 or 6.0 Voice Mail on your phone system, select the appropriate Xpressions option.

If you use a Voice Mail System other than Xpressions and have instructions for that Voice Mail system you can provide to your users in the form of a file or a webpage, select Other.

If you do not have a Voice Mail system or do not want your users to see Xpressions Voice Mail help in PhoneGuide LIVE!, select None.

After you make your selection in the Voice Mail field, click on Next.

The next window you see will be different depending on your switch type. If you installed PhoneGuide LIVE! for an OpenScape Voice switch, go to the next section, *Creating a User Group for an OpenScape Voice Switch*. If you installed PhoneGuide LIVE! for a HiPath 4000, go to *Creating a User Group for a HiPath 4000 Switch*. If you installed PhoneGuide LIVE! for a HiPath 3000, go to *Creating a User Group for a HiPath 3000 Switch*.

3.3.1. Creating a User Group for an OpenScape Voice Switch

The User Group Switch Properties window displays. You will use this window to define the switch and extensions that will be imported into this User Group, as well as the phone features your users will be able to view help for in PhoneGuide LIVE!.

Click on the Servers button to add the server from which you will import phone information. This is your OpenScape Voice Common Management Portal.

The OpenScape Voice Management Servers window displays. In this window, click on Add. Fill out the Name, User Name, Password and Server URL fields. PhoneGuide LIVE! will use this information to access the server. Following are the definitions of these four OpenScape Voice Management Servers fields, with an example below.
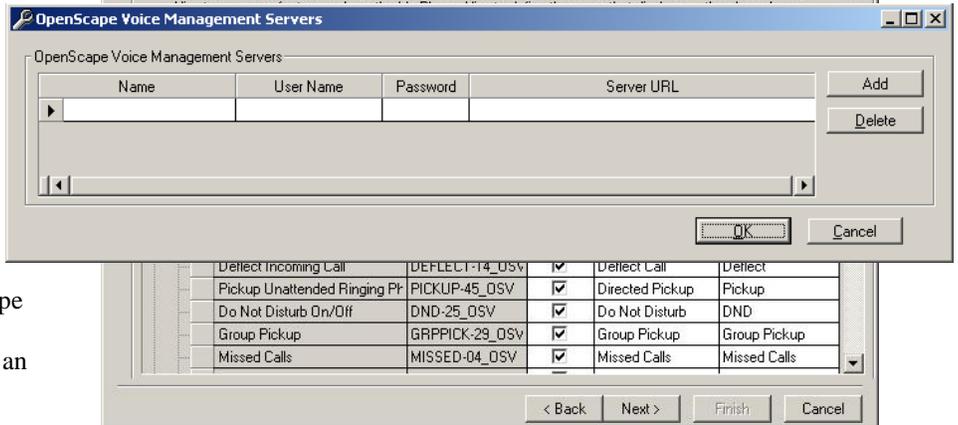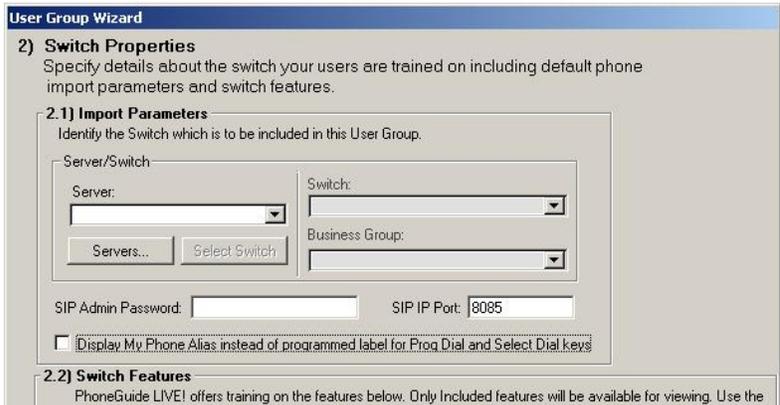
- **Name** – This is a user definable name, making it convenient for the user to identify the server.

- **User Name** – This is the login user name for the OpenScape Voice Common Management Portal. (name@domain)

- **Password** – This is a password for the OpenScape Voice Common Management Portal.

- **Server URL** – This is an address that allows PhoneGuide LIVE! to connect to the OpenScape Voice Common Management Portal. Please note this URL is case-sensitive.

Example of what these fields might look like:

Name: OpenScape Voice 1
User Name: administrator@system
Password: Abc123!.
Server URL: https://10.152.55.10/HiPath8000AssistantAPIv310/services/HiPath8000AssistantAPI

Note: To delete a server from the OpenScape Voice Management Servers window, press the bookmark button (to the left of the Name field), which highlights the field, and then click Delete.

After entering the information in the OpenScape Voice Management Servers window, click on OK. The User Group Switch Properties window displays again.

Select the server from the Server drop-down list and click on the Select Switch button. If there is only one switch with the selected Server, the Switch field will be automatically filled as the information is retrieved. For simplest configuration select <Default> from the Business Group drop-down. If there are multiple Switches, you will have to use the drop-down list in each field to select the appropriate information.

Note: If you have one or more business groups within a switch and you need to display a unique set of phone or voice mail features to your users, instead of selecting <Default> in the Business Group drop-down, select the specific business group. For example, if you have three business groups on a switch (BG1, BG2 and BG3) and the users in BG1 need a different feature set than BG2 and BG3, you may create a user group specifically for BG1. All other business groups will follow the configuration of the <Default> user group.

Next, you must enter the SIP Admin Password as well as the SIP IP Port. Defaults are **123456** for the Admin Password and **8085** for the IP Port. Check with your System Administrator to verify this for your environment. Note: If you want SSL communication, enter **443** in the SIP IP Port field.

If you do not want your users to see the actual programmed labels (numbers or names) for the Programmed Dial (repdial) and Selected Dialing keys on the My Phone page, check the "Display My Phone Alias instead of programmed label for Prog Dial and Selected Dial keys" box. When the user views the My Phone page, the key labels will only show the defaulted text you enter below in Switch Features. If unchecked, the user will see the actual programmed label as defined in the phone menu.

The Switch Features at bottom half of the Switch Properties window displays all of the telephone features available in PhoneGuide LIVE!. The purpose of this list is to allow you to select the phone features for which PhoneGuide LIVE! will display training and help. You may want to simplify things for your users by limiting the feature list to those features they can actually use. Please note that there are features that are configured to appear by default, as a convenience.

- Under the Feature List columns you can click the Include checkbox to include a feature on the Phone Features page of the PhoneGuide LIVE! web application.

- Under Feature List use the Alias column to change the feature name if you prefer a different name to display in PhoneGuide LIVE!. We recommend using no more than 15 characters.

- Under the My Phone section, use the Alias column to modify the text that will display on the phone buttons of the My Phone page of the web application. You can substitute your organization's shorthand names for phone features, if applicable.

Note that the pencil icon next to a feature indicates that an edit has been made but not saved. Go to File – Save to save your changes.

Go to the *Voice Mail Features* section to continue the User Group creation process.

3.3.2. Creating a User Group for a HiPath 4000 Switch

The User Group Switch Properties window displays. You will use this window to define the IP address of the server, the stations that will be imported, and the phone features your users will be able to view help for in PhoneGuide LIVE!.

Click on the Servers button to add the server from which you will import phone information. This may be your HiPath switch or your HiPath Manager.

The HiPath Servers window displays. In the HiPath Servers window, click on Add. Now click on the Name and IP Address fields to enter the name of the server and its IP address. PhoneGuide LIVE! will use this information to access the server.

After entering the information, click on OK. The User Group Switch Properties window displays again.

Select the switch from the Server drop-down list and click on the Select Switch button. If there is only one domain and switch associated with the selected Server, the Domain and Switch fields will be automatically filled as the switch information is retrieved. If there are multiple domains and switches, you will have to use the drop-down list in each field to select the appropriate information.

In the Group's Extension(s) or Range(s) field, enter the extensions for which you wish to import information. You can enter these extensions as a range and as a comma-separated list. For example, you could enter extension information as follows: **1400-1425, 1429, 1435, 1440-1450** and PhoneGuide LIVE! will download information for those extensions during the import process. Leaving this field blank indicates that all extensions will be imported. Note that when you import, you will be importing for all the PhoneGuide LIVE! User Groups defined for the HiPath Switch or HiPath Manager.

In the Save Phones of Type drop-down list you can choose to filter the download of phone information from the switch by phone type. The default is all phones. You will only enter a phone type if you are building a new User Group and you want to limit it to phones of a certain type.

It is recommend not to down load phantom extensions so you will want to check 'std' field in SBCSU amo. The default is 127 if you have changed this or use additional codes please enter here.
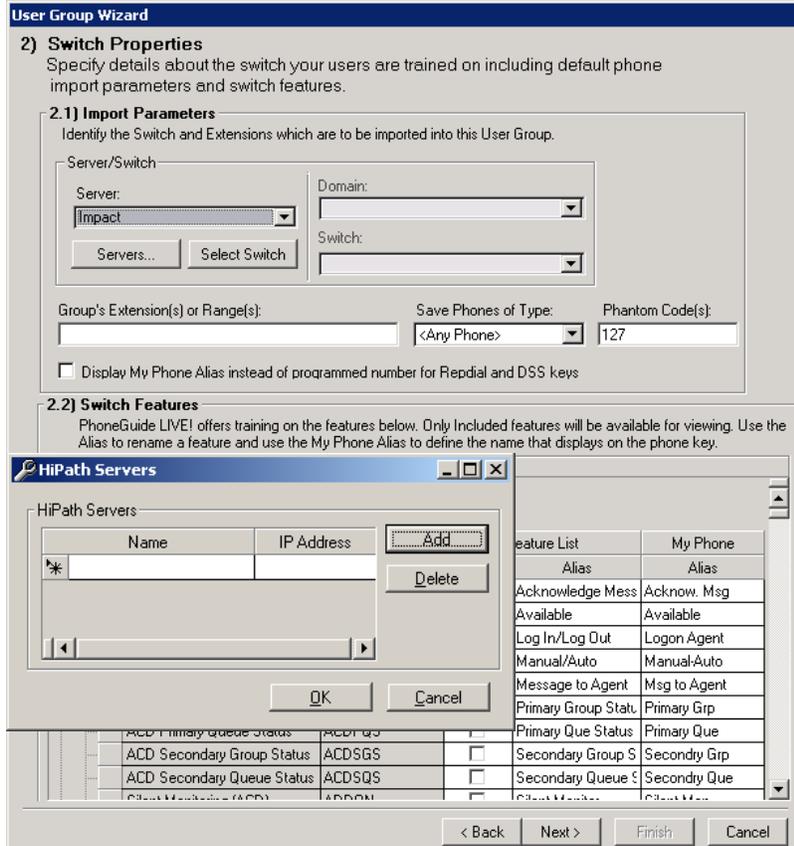
If you do not want your users to see the actual programmed numbers for the Repertory Dial (speed) and Direct Station Select (DSS) keys on the My Phone page, check the "Display My Phone Alias instead of programmed number for Repdial and DSS keys" box. When the user views the My Phone page, the key labels will only show the defaulted text you enter below in Switch Features. If unchecked, the user will see the actual programmed number. Note: You must reimport the phones if you update this after initial import.

The Switch Features at the bottom of the Switch Properties window displays all of the telephone features available in PhoneGuide LIVE!. These features are sorted by categories. Click on the expandable list button to the left of the displayed category to see all the features in the category. Use the scroll bar to scroll down and see other expandable categories.

The purpose of this list is to allow you to select the phone features for which PhoneGuide LIVE! will display training and help. You may want to simplify things for your users by limiting the feature list to those features they can actually use. For example, many of your users may not have access to ACD features. You can choose to not include those features so those users will not be able to view training video and read about them. Please note that there are features that are configured to appear by default, as a convenience.

- Under the Feature List columns you can click the Include checkbox to include a feature on the Phone Features page of the PhoneGuide LIVE! web application.

- Under Feature List use the Alias column to change the feature name if you prefer a different name to display in PhoneGuide LIVE!. We recommend using no more than 15 characters.

- Under the My Phone section, use the Alias column to modify the text that will display on the phone buttons of the My Phone page of the web application. You can substitute your organization's shorthand names for phone features, if applicable.

> Note that the pencil icon next to a feature indicates that an edit has been made but not saved. Go to File – Save to save your changes.

Go to the *Voice Mail Features* section to continue the User Group creation process.

3.3.3. Creating a User Group for a HiPath 3000 Switch

User Groups for the HiPath 3000 use predefined phone templates. Your users will log in with the name of the phone template that corresponds to their phone.

The Switch Properties window displays all of the telephone features available in PhoneGuide LIVE!. The purpose of this list is to allow you to select the phone features for which PhoneGuide LIVE! will display training and help. You may want to simplify things for your users by limiting the feature list to those features they can actually use. For example, many of your users may not have access to ACD features. You can choose to not include those features so those users will not be able to view training video and read about them.

Please note that there are features that are configured to appear by default, as a convenience.

- Under the Feature List columns you can click the Include checkbox to include a feature on the Phone Features page of the PhoneGuide LIVE! web application.

- Under Feature List use the Alias column to change the feature name if you prefer a different name to display in PhoneGuide LIVE!. We recommend using no more than 15 characters.

- Under the My Phone section, use the Alias column to modify the text that will display on the phone buttons of the My Phone page of the web application. You can substitute your organization's shorthand names for phone features, if applicable.

Note that the pencil icon next to a feature indicates that an edit has been made but not saved. Go to File – Save to save your changes.

Go to the *Voice Mail Features* section to continue the User Group creation process.

3.3.4. Voice Mail Features

Depending on the Voice Mail option you selected previously, Xpression 4.0, Xpressions 5.0, Xpressions 6.0, Other, or None, your next step will be different.

If you selected None…you are finished creating this User Group. Click on Finish and see *Importing Information from the Switch to PhoneGuide LIVE!* for instructions on importing your switch information.

If you selected Other…click on Next. The Voice Mail Properties for the Other option window displays.

Enter the name of the Voice Mail system in the Name field, and in the Help Link field enter a network file location or URL that points to instructions on using the Voice Mail system. If you enter a URL, you must use the http:// format; e.g., http://www.impacttech.com.

The name in the Name field will display as an active link to the file location or URL specified in the Help Link field. This active link will display in the PhoneGuide LIVE! browser client.

Your users must have network access to the file or URL. They must also be able to view the file. For example, if you point them towards an Acrobat file, they need to have access to Acrobat Reader. The Help Link file or URL will appear within PhoneGuide LIVE! and be displayed as an active link.
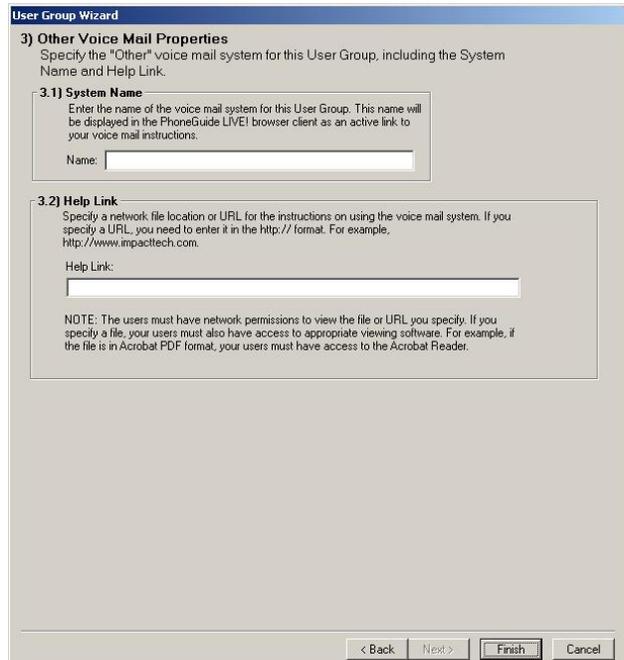
After entering information, click Finish. See *Importing Information from the Switch to PhoneGuide LIVE!* for instructions on importing your switch information.

If you selected Xpressions 4.0, Xpressions 5.0 or Xpressions 6.0…click on Next. The Voice Mail Properties for the appropriate Xpressions type displays.

The Voice Mail Properties window allows you to enter Document Substitutions. This is a feature that allows you to customize a PDF Voice Mail document for your users. You can enter the default initial password your users will use to access their Voice Mail set up options. You can also enter other access numbers, such as the direct access numbers for internal or external use, the guest access number, and so on. Refer to your Voice Mail documentation for more information about these access numbers.

The Voice Mail Features list includes a list of all available Voice Mail features. These features are sorted by expandable categories. Click on the expandable list button to the left of the displayed category to see all the features in the category. Use the scroll bar to see other categories.

The purpose of this list is to allow you to select the Voice Mail features for which PhoneGuide LIVE! will display training and help. You may want to simplify things for your users by limiting the Voice Mail list to the features they can actually use. Please note that there are features that are configured to appear by default, as a convenience.

- Under Feature List click the Include checkbox to include a feature on the Voice Mail Features page of PhoneGuide LIVE!.

- Under Feature List use the Alias column to change the feature name if you prefer a different name to display in PhoneGuide LIVE!. We recommend using no more than 15 characters.

> Note that the pencil icon next to a feature indicates that an edit has been made but not saved. Go to File – Save to save your changes.

You do not have to edit this list during this configuration process. You can use PhoneGuide LIVE! Administrator to edit this list at a later date.

Click on Finish to save your changes. You may repeat this process to create another User Group. Or, if you are finished creating User Groups:

- OpenScape Voice:
    - You may edit the Extension/Login names for the phone templates. (see 3.5.4)
    - Users may access PhoneGuide LIVE! via the web interface, using their complete telephone numbers or phone templates for login. (see 3.5.1)
- HiPath 4000:

o   You may edit the Extension/Login names for the phone templates. (see 3.5.4)

o   You can now import your phone information from the switch into PhoneGuide LIVE!. (see 3.4)

o   It is recommended that you create all of your User Groups before doing an import.

o   After phone information is imported, users may access PhoneGuide LIVE! via the web interface, using their extensions for login. (see 3.5.2)

- HiPath 3000:

o   You may edit the Extension/Login names for the phone templates. (see 3.5.4)

o   Users may access PhoneGuide LIVE! via the web interface, using phone templates for login. (see 3.5.3)

3.4. Importing from the Switch (HiPath 4000 only)

Once you finish creating User Groups, you can import station information from the switch into PhoneGuide LIVE!. From the PhoneGuide LIVE! Administrator window, select the File – Import Phones option. The Import window displays.
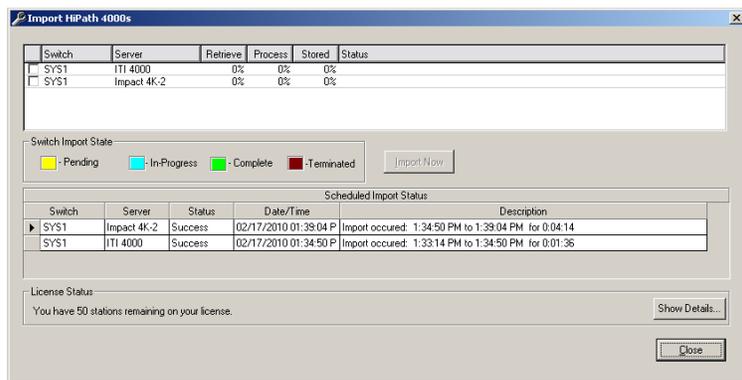
Select the switch you want to import from by clicking on the blank box to the left of the switch name and placing a checkmark in the box. You can queue up multiple switches for import by selecting multiple switches. Once selections are complete, click on Import Now.

Note: The License Status field at the bottom of the window displays how many stations are remaining on your license or if you have exceeded your license capacity. If you exceed the license count for the HiPath 4000, all users will be prohibited from logging in to PhoneGuide LIVE!, no matter the switch type if it is a multi-switch environment. (Please see sections 4.5.1 and 4.5.1.2 for more information.)

> Please note that when you are importing for one User Group, you will actually be importing for every User Group you have defined for that particular switch. Depending on the number of stations you have defined in your User Groups for that switch, this could be a lengthy import process.

The Switch Import Status indicators are simply color codes that show you the status of your import. Since you can queue up multiple switches for import, those switches waiting will be colored yellow to indicate they are pending. Any imports colored red were terminated prematurely. You will have to read the error message to determine the cause of the import failure.

After the import is finished, you will be ready to generate the URL you will send to your users so they can access PhoneGuide LIVE!.

3.5. Getting the URL to Distribute to Your Organization

After you set up PhoneGuide LIVE!, you need to get the URL which will allow your organization members to access it with their browsers over your intranet or the internet.

Go to the Help menu and select Client URL. The Client URLs window displays.
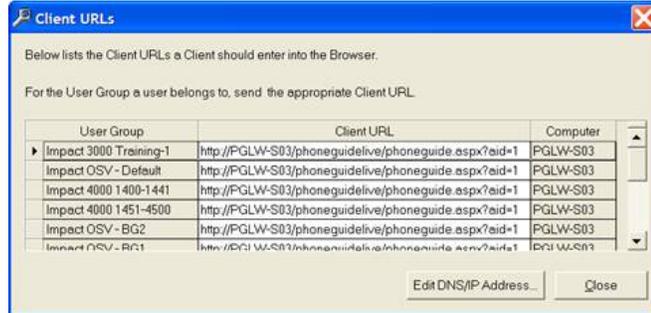
In this example, we have defined two User Groups. The URL you would give to each member in a User Group is listed.

3.5.1. How OpenScape Voice users will use PhoneGuide LIVE!

Note the URL and distribute it to the members of the User Group. They will use it to access PhoneGuide LIVE! via their browsers. Users enter their complete telephone numbers (for international customers, this includes country code) to log in to PhoneGuide LIVE! to view video and text training help customized for their individual phone. Please note that individual phone numbers are imported (and appear in the Administrator tool) upon each user's first login to the PhoneGuide LIVE! web client. Select the Refresh option on the menu bar to see if additional numbers have been imported since you have logged in to the Administrator tool.

Users may also use the name of a phone template matching their desk phone to log in to PhoneGuide LIVE!. Logging in to PhoneGuide LIVE! with phone templates is optimal for training before the stations are configured on the switch. Please see section 3.5.4 for more information on using phone templates to log in to PhoneGuide LIVE!.

3.5.2. How HiPath 4000 users will use PhoneGuide LIVE!

Note the URL and distribute it to the members of the User Group. They will use it to access PhoneGuide LIVE! via their browsers. They need their station extension to log in to PhoneGuide LIVE! to view video and text training help customized for their individual phone.

Users may also use the name of a phone template matching their desk phone to log in to PhoneGuide LIVE!. Logging in to PhoneGuide LIVE! with phone templates is optimal for training before the stations are configured on the switch. Please see section 3.5.4 for more information on using phone templates to log in to PhoneGuide LIVE!.

3.5.3. How HiPath 3000 users will use PhoneGuide LIVE!

Note the URL and then distribute it to the members of the User Group. They will use it to access PhoneGuide LIVE! via their browsers. You will also need to distribute the Extension/Login information your users will need to enter to access the phone model they use.

HiPath 3000 users enter a phone template name to log in rather than an extension number like they would use for a HiPath 4000 switch. The Extension/Login column lists the names that your users will use to access PhoneGuide LIVE! help and training for a specific phone model. Please see section 3.5.4 for more information on using phone templates to log in to PhoneGuide LIVE!.

3.5.4. Using Phone Templates to Log In

OpenScape Voice, HiPath 4000 and HiPath 3000 users may log in to PhoneGuide LIVE! with phone templates designed to match their desktop phones. For OpenScape Voice and HiPath 4000 switches, this is optimal for training before cutover has occurred.

Go to File – Phone Templates to view the Phone Templates window.

The Templates for Switch Type drop-down lets you select the OpenScape Voice, HiPath 4000 or HiPath 3000 switch type.

The Extension/Login column lists the names that your users will use to access PhoneGuide LIVE! help and training for a specific phone model. Below are the standard logins with default names bolded. You may edit the Extension/Login name for each template if a different name is more convenient for your PhoneGuide LIVE! users. To optimize performance, it is recommended that custom template names start with at least one alpha character. For a detailed look at phone templates, please see section 5.
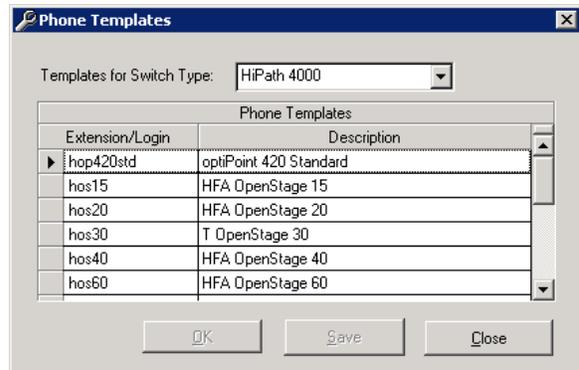
OpenScape Voice users can access help and training for the following default phone templates:

- **op420std** – for OptiPoint 420 Standard Display phones
- **op420std-2** – for OptiPoint 420 Standard with Line Display phones
- **op420adv** – for OptiPoint 420 Advance Display phones
- **os15** – for OpenStage 15 phones
- **os20** – for OpenStage 20 phones
- **us20** – for OpenStage 20 US phones (buttons have named labels instead of icons)
- **os40** – for OpenStage 40 phones
- **us40** – for OpenStage 40 US phones (buttons have named labels instead of icons)
- **os60** – for OpenStage 60 phones
- **os80** – for OpenStage 80 phones

HiPath 4000 users can access help and training for the following default phone templates:

- **hop420std** -- for OptiPoint 420 Standard Display phones
- **hos15** – for OpenStage 15 HFA phones
- **hos20** -- for OpenStage 20 HFA phones
- **hos30** -- for OpenStage 30 TDM phones
- **hos40** -- for OpenStage 40 HFA phones
- **hos60** -- for OpenStage 60 HFA phones
- **hos80** -- for OpenStage 80 HFA phones

HiPath 3000 users can access help and training for the following default phone templates:

- **op500std** – for OptiPoint 500 Standard Display phones
- **op500adv** – for OptiPoint 500 Advance Display phones

- **op420std-1** – for OptiPoint 420 Standard Display phones

3.5.5. Explanation of Possible Error Messages

The following is a list of possible error messages that may appear in the PhoneGuide LIVE! web user interface and explanations for these messages.

Extension or Template not found: The telephone number, extension or template was not found in the database or by querying the OpenScape Voice switch. Or, the telephone number you entered exists in an OpenScape Voice business group that is not defined as a User Group in PhoneGuide LIVE!. (No <Default> User Group is defined or no User Group associated with specific business group exists.)

Session expired. Please refresh your browser: The ASP.NET session has expired. This usually happens after 20 minutes of no activity, but can also happen when the web server is restarted. The browser must be refreshed to start a new session.

Phone Model not supported by PhoneGuide LIVE!. Please see your administrator for documentation: PhoneGuide LIVE! was able to contact a SIP phone, but it is not an OpenStage or optiPoint SIP phone model supported by PhoneGuide LIVE!.

Network error trying to contact phone: PhoneGuide LIVE! was able to find the phone's IP address when it queried the switch, however it was unable to actually contact the phone. If there is no information in the database, this error message returned. Note: If there is an import of the phone from a previous PhoneGuide LIVE! session, it will be displayed to the user.

Error logging into phone. Please contact your administrator: PhoneGuide LIVE! is unable to log into the phone. Please validate the SIP Admin password in the PhoneGuide LIVE! Administrator User Group configuration. The phone password may be configured with a different password.

Error connecting to database: PhoneGuide LIVE! is unable to connect to the database. System Administrator must check to ensure PhoneGuide LIVE! database is running and accepting connections.

Account not found: PhoneGuide LIVE! is able to connect to the database, but the particular account requested cannot be found.

System is not activated. Please contact your administrator: Users cannot access PhoneGuide LIVE! until it has been activated by the administrator. This may be done by registering the product or entering an activation key in the administrative tool. (See 3.2 for details.)

License exceeded. Please contact your administrator: Your license capacity has been exceeded. Users will not be able to log in to PhoneGuide LIVE! until license capacity is expanded. (See 4.5.1 for details.)

System error. Please contact your administrator: PhoneGuide LIVE! has encountered an unexpected error. This could be due to computer name change. (See 3.5.5.1 for details.)

3.5.5.1. Server Name Change

If the server name is changed after IIS has been installed, PhoneGuide LIVE! will encounter system errors. As background, when IIS is installed on a server, it creates a special account that it will use to perform server-side web requests, such as PhoneGuide LIVE! queries to OpenStage phones in an OSV network. This user account is always named in the pattern of: IUSR_[computername], where [computername] is the name of the computer. So, for example, on a computer named TEST01, this user is IUSR_TEST01.

In the IIS Manager, if you right click on a web site or a directory and select Properties, there is a Directory Security tab. The top section is "Anonymous access and authentication control." If you click on the "Edit" button, at the top you will see the user already pre-populated in the Anonymous Access User Account field. Whenever a new virtual directory or web site is created, IIS automatically fills in this field.

When the server's name is changed, IIS does not check to see if there is an existing account. It simply fills in IUSR_[computername] in that blank. Since the account is created when IIS was first installed, it is using the old [computername]. For instance, if we changed TEST01 to PGLTEST, IIS would put IUSR_PGLTEST into the Anonymous Access User Account field, but the actual account would still be IUSR_TEST01. Normal web server operations would still work, but any behind-the-scenes, code-based operations, like in PhoneGuide LIVE!, will fail.

When the server name is changed, create a local user on that machine with the new [computername] in it. In the example above, create a user named IUSR_PGLTEST. Remove it from the "Users" group and put it in the "Guests" group. Make sure when creating this user to:

- o Uncheck the "User must change password on next login" (it is checked by default)
- o Check "Password never expires"

Lastly, after the user is created, go into the IIS manager, right click and bring up the Properties for the virtual directory or website (such as "phoneguidelive"). Click on the Directory Security tab and click Edit in the "Anonymous access and authentication control" section. Put in the password you set for the new user account and click OK. It will prompt you to confirm the password.

3.5.6. Getting Started Training Times

The following table lists the average time (in minutes) that it will take users to get trained using the Getting Started video for each phone model.

	OpenStage 60/80	OpenStage 40	OpenStage 30	OpenStage 20	OpenStage 15	optiPoint/ optiset
OpenScape Voice	20 min.	20 min.	Not available	15 min.	15 min.	10 min.
HiPath 4000	20 min.	20 min.	17 min.	13 min.	15 min.	10 min.
HiPath 3000	Not available	Not available	Not available	Not available	Not available	10 min.

Note that Xpressions voice mail training is not included in the above listed training times. The Getting Started video for Xpressions assists users in setting up their voice mail boxes and discusses basic mailbox access. This video is about 5 minutes in length. Additional video training for Xpressions may take anywhere from 5 to 20 minutes.

4. Using PhoneGuide LIVE! Administrator After the Initial Configuration

After PhoneGuide LIVE! Administrator is configured, you will use it to make PhoneGuide LIVE! available to new members of your organization and to edit any of the basic setup information.

For more information on using PhoneGuide LIVE! Administrator, refer to the online help.

4.1. Changing PhoneGuide LIVE! Administrator User Information

You can change your PhoneGuide LIVE! Administrator login information or add new login information for yourself or another user if you want.

Select the System – Users option. The Users window will display.

Use this window to add new users, edit existing user information, or delete a user.

When you add a new user, you are prompted for a name and password.

When you edit an existing user, you are allowed to change the user name and password.
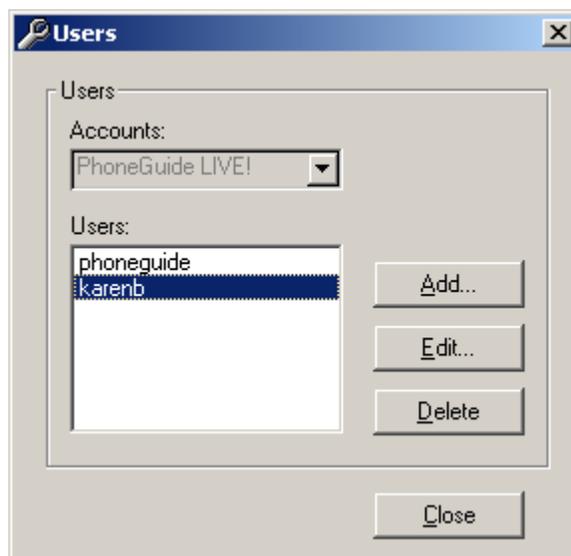
4.2. Changing the Client URL

During the installation process you entered in either the IP address of the server or a DNS name. If this has changed you can edit the URL.

Select the Help – Client URL option

Click on the Edit DNS/IP Address button

Enter in the new DNS or IP address and click on OK

The Client URL will now display with your change.

4.3. Setting up a Scheduled Task to automate Imports (HiPath 4000 only)

You can use the Windows Scheduled Task option to set up a recurring Import for PhoneGuide LIVE! You can even set up this Scheduled Task so that it will run as a Service so that the PhoneGuide LIVE! Administrator does not need to be open.

To set up a Scheduled Task, go to Control Panel – Scheduled Tasks – Add Scheduled Task. The Scheduled Task wizard displays.

Click Next. A list of Applications displays.

If you do not see PhoneGuide LIVE! listed, click on Browse and go to the directory where the PhoneGuide LIVE! Administrator tool was installed. You need to fine PGLWebAdmin.exe and select it. This is the application you will schedule.

After you browse to PGLWebAdmin.exe, select it and click on Open. A Scheduled Task window displays:

Select the recurring (or non-recurring) interval on which you want the Import to occur, and then click on Next.

Select the time (and day information if applicable) on which you want the Import to occur, and click on Next.

A user name and password window displays. Here you enter the user information for the Windows account on this PC. This is not asking you for PhoneGuide LIVE! information. Click on Next after you enter the information. You will see a confirmation window for the application you scheduled.

You do want to open the advanced properties for this scheduled event, so select that checkbox and click on Finish.
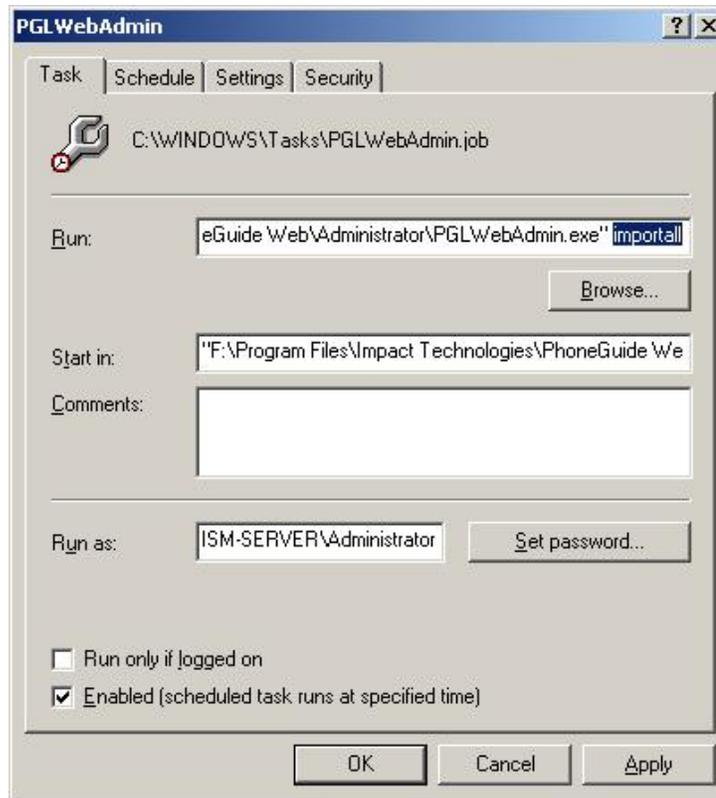
In the Run field, after the string that identifies the executable that is scheduled, enter a space and then **importall**. The Import will not work if you do not make this modification.

Note that if you want this Import to be able to run as a service, do not check the box for "Run only if logged on". You do need to check the box for "Enabled" (scheduled task runs at specified time) however.

Click on OK and you are finished and the Import will occur as scheduled.

4.4. Starting and Restarting Services

Follow these instructions to start or restart a service that is required for running PhoneGuide LIVE! Administrator. These services may include Impact DB Service, World Wide Web Publishing service and/or the IIS Admin service.

1. Go to the Control Panel and access the Administrative Tools option.

2. Select Services.

3. In the Services window, find and select the service you would like to start or restart.

4. Select the option in the upper left corner of the window to Start the service/Restart the service.

Note: You may be prompted to confirm your selection if another service will be restarted with it. For example, if you choose to restart the IIS Admin service, the World Wide Web Publishing service will also be restarted.

4.5. License Capacity: Checking Station Count

It is recommended that you check your PhoneGuide LIVE! station count every so often, so that you may be aware if your license limit is nearing full capacity.

In the Administrator tool, select License Information from the System dropdown to view information relating to your licensed station import capacity.
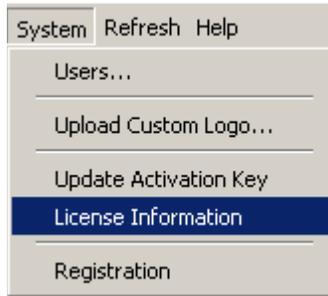
The PhoneGuide LIVE! License Information screen will display.
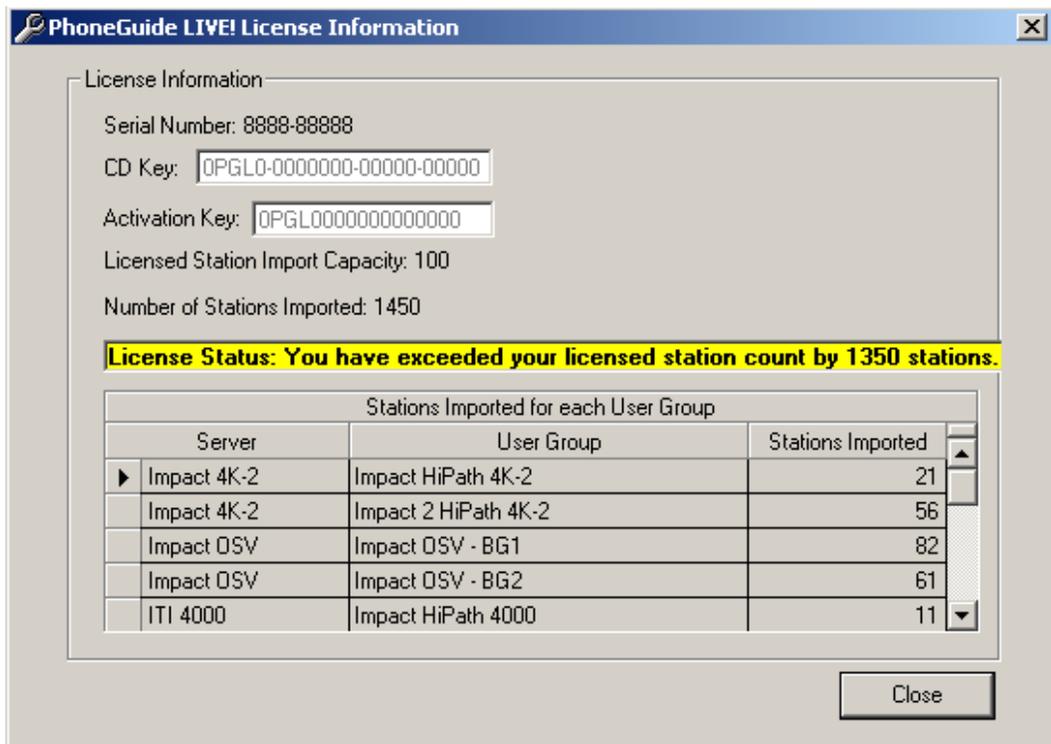
In this screen, you may view the serial number, license keys, the number of stations licensed and the number imported, as well as how many stations are imported for each User Group. There is also a License Status field that indicates whether you are within or have exceeded your licensed

station count. If you have exceeded your license capacity, this field will be highlighted yellow and will display a message that tells how many stations your license has been exceeded by. In the example above, the license station count has been exceeded by 1350.

4.5.1. What Happens when License Capacity is Exceeded?

Depending on your switch type, a couple of different things may happen when your license capacity is exceeded. The following two sections describe how license capacity is handled for an OpenScape Voice Switch and a HiPath 4000 switch.

Note: Please contact Impact Technologies at 314.743.1430 to purchase additional license capacity.

4.5.1.1. OpenScape Voice License Capacity

Because OpenScape Voice stations are imported into PhoneGuide LIVE! as users log in to the web tool, the administrator may not find out their organization's license capacity is exceeded right away. This is why it is important to check the status of your license capacity every so often.

Once your license capacity is met, additional users will not be able to log in to the PhoneGuide LIVE! web tool. If they attempt to, they will see the following message below the Login prompt:

License exceeded. Please contact your administrator.

Additional users will only be able to log in if the license capacity is expanded.

4.5.1.2. HiPath 4000 License Capacity

If you run an Import in PGL for your HiPath 4000 and the number of phones imported exceeds the number you have licensed, you will see a highlighted yellow message display in the License Status field at the bottom of the Import screen. This field tells how many stations your license has been exceeded by.
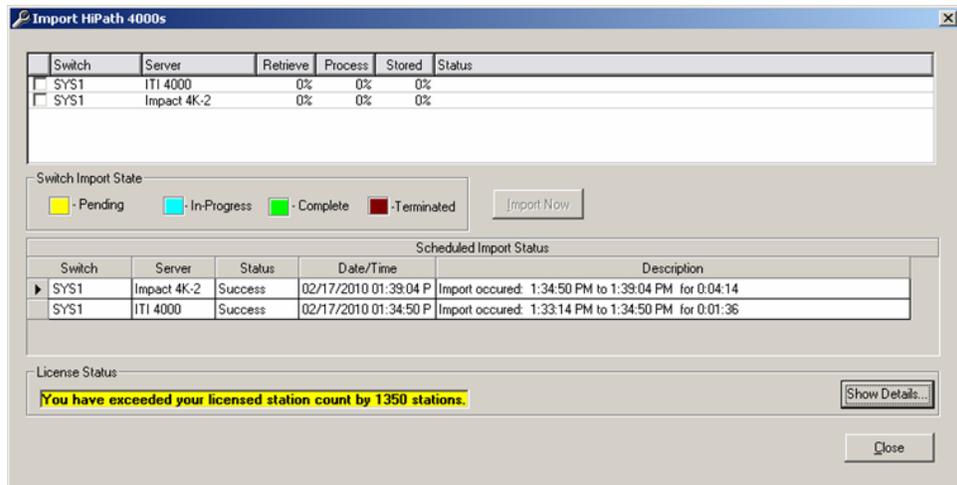
If this happens, your users will no longer be able to log in to the PhoneGuide LIVE! web tool. If they attempt to, they will see the following message below the Login prompt:

License exceeded. Please contact your administrator.

Users will only be able to log in after the license capacity is no longer exceeded.

4.6. Uploading a Custom Logo

When you initially install PhoneGuide LIVE! the Impact Technologies logo is defaulted to appear in the lower left corner of the web user interface. If you wish to remove the logo or customize it by adding your company's logo, you may do so using the PhoneGuide LIVE! Administrator tool.

While in the PhoneGuide LIVE! Administrative tool, click on the System dropdown and select Upload Custom Logo.
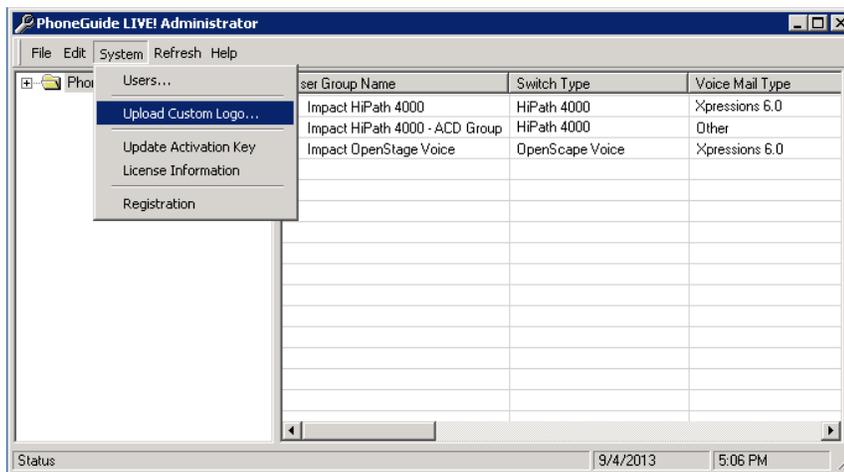
The following screen will appear:

Select the Clear Logo button to remove the logo from the web interface. (Do not delete the Impact logo file from the directory.) To customize the logo either type in the location of the logo file you wish to upload, or click the ellipses button to browse for the desired logo file. Click Ok to save changes.

For the change to take effect, the user must close out of the web browser and log back in to PhoneGuide LIVE!.

Note: The ideal logo file is a JPEG, PNG or GIF formatted image with a width of 150 pixels and a height of 150 pixels.

4.7. Printing OpenStage 15 and OpenStage 30 Faceplates

Since OpenStage 15 and OpenStage 30 phones are not self-labeling, Impact provides you with a document containing two templates that you may use. Users may access this document by going to the Phones - Documents dropdown in PhoneGuide LIVE! and selecting Faceplate.

The fields in the first template are automatically generated with the default labels for each programmed feature. The second template is blank, if you wish to manually enter your programmable key labels. Print and cut out either template to use as a faceplate on your OpenStage 15 or OpenStage 30 phone.

Note: The font used in this template is Tahoma, size 9 or bold size 10, depending on the phone type. If a user does not have this font type on their computer, the text for the labels will be generated with a default font. The user's default font may not be as readable as the Tahoma font.

5. PhoneGuide LIVE! Phone Templates

PhoneGuide LIVE! offers preset phone templates for your convenience. These templates offer interactive tutorials for programmable keys, fixed function keys, and other keys that may be present on the phone.

The following pages exhibit each template; listing default programmed keys. The templates are organized first by switch type and then by phone model. Default programmed keys are displayed in the same order they are shown on each My Phone page. Example:

5.1. OpenScape Voice Templates

5.1.1. OpenStage 80 SIP Phone

The OpenStage 80 phone includes fixed keys to support Call Forwarding, Mute, Speaker, and Headset. And, features such as Consult, Blind Transfer, Hold and Conference are typically accessed via the menus and prompts during a call.

5.1.1.1. Template: os80

Prog Dial
Prog Dial
Prog Dial
Alternate
Call Wait
Deflect
Ringer Off
Consultation
Shift

Shifted:

Prog Dial
Prog Dial
Prog Dial
Prog Dial
Prog Dial
Prog Dial
Prog Dial
Prog Dial
Shift

5.1.2. OpenStage 60 SIP Phone

The OpenStage 60 phone includes fixed keys to support Call Forwarding, Mute, Speaker, and Headset. And, features such as Consult, Blind Transfer, Hold and Conference are typically accessed via the menus and prompts during a call.

5.1.2.1. Template: os60

Prog Dial
Prog Dial
Alternate
Call Wait
Deflect
Ringer Off
Consultation
Shift

Shifted:

Prog Dial
Prog Dial
Prog Dial
Prog Dial
Prog Dial
Prog Dial
Prog Dial
Shift

5.1.3. OpenStage 40 SIP Phone

The OpenStage 40 phone includes fixed keys to support Call Forwarding, Mute, Speaker, Redial and Headset. And, features such as Consult, Blind Transfer, Hold and Conference are typically accessed via the menus and prompts during a call. For the os40 template, the fixed keys have icons for button labels.

5.1.3.1. Template: os40

| Prog Dial |
| Prog Dial |
| Call Wait |
| Ringer Off |
| Consultation |
| Shift |

Shifted:

| Prog Dial |
| Prog Dial |
| Prog Dial |
| Prog Dial |
| Prog Dial |
| Shift |

5.1.4. OpenStage 40 US SIP Phone

The OpenStage 40 US phone includes fixed keys to support Conference, Transfer, Hold, Speaker, Mute and Headset. And, features such as Disconnect and Alternate are typically accessed via the menus and prompts during a call. For the us40 template, the fixed keys have names for button labels.

5.1.4.1. Template: us40

Shift
Phonebook
Group Pickup
Call Forward
DND
Show Phone

Shifted:

Shift
Prog Dial
Prog Dial
Prog Dial
Prog Dial
Prog Dial

5.1.5. OpenStage 20 SIP Phone

The OpenStage 20 phone includes nine fixed keys. Features such as Consult, Deflect and Repeat Dial are accessed via the menus and prompts

5.1.5.1. Template: os20

There are no programmable keys on OpenStage 20 phones, but this template still provides My Phone help for the nine fixed function keys and the navigator. For the os20 template, the fixed keys have icons for button labels.

5.1.5.2. Template: us20

There are no programmable keys on OpenStage 20 phones, but this template still provides My Phone help for the nine fixed function keys and the navigator. For the us20 template, the fixed keys have names for button labels.

5.1.6. OpenStage 15 SIP Phone

The OpenStage 15 phone includes fixed keys to support Speaker and Mailbox/Messages. And, features such as Consult, Blind Transfer, Hold and Conference are typically accessed via the menus and prompts during a call.

5.1.6.1. Template: os15

Hold
Mute
Fwd All Calls
Ringer Off
Pickup
Prog Dial
Prog Dial
Shift

Shifted:

Prog Dial
Prog Dial
Prog Dial
Prog Dial
Prog Dial
Prog Dial
Prog Dial
Shift

5.1.7. optiPoint 420 Advance Phone

The optiPoint 420 Advance phone includes 18 programmable keys and three navigation keys.   Features such as Consult/Transfer, Blind Transfer, Hold and Conference may be accessed via the optiGuide menu during a call.

5.1.7.1. Template: op420adv

Messages	Line
Forward	Line
Hold	Prog Dial
Speaker	Prog Dial
Mute	Prog Dial
	Prog Dial
	Prog Dial
	Prog Dial
	Missed Calls
	Consult/Xfer
	Repeat Dial
	Cancel/Rel
	Shift

Shifted:

Prog Dial	Prog Dial
Prog Dial	Prog Dial
Prog Dial	Prog Dial
Prog Dial	Prog Dial
Prog Dial	Prog Dial
	Prog Dial
	Prog Dial
	Prog Dial
	Prog Dial
	Prog Dial
	Prog Dial
	Prog Dial
	Shift

5.1.8. optiPoint 420 Standard Phone

The optiPoint 420 Standard phone includes 12 programmable keys and three navigation keys. Features such as Consult, Transfer, Conference and Station Park may be accessed via the optiGuide menu during a call.

5.1.8.1. Template: op420std

Messages	Prog Dial
Forward	Prog Dial
Hold	Missed Calls
Speaker	Consult/Xfer
Mute	Repeat Dial
	Cancel/Rel
	Shift

Shifted:

Prog Dial	Prog Dial
Prog Dial	Prog Dial
Prog Dial	Prog Dial
Prog Dial	Prog Dial
Prog Dial	Prog Dial
	Prog Dial
	Shift

5.1.8.2. Template: op420std-2

Mute	Messages
Blind Xfer	Shift
Hold	Prog Dial
Cancel/Rel	Prog Dial
Speaker	Prog Dial
	Prog Dial
	Line

Shifted:

Prog Dial	Prog Dial
Prog Dial	Shift
Prog Dial	Prog Dial
Prog Dial	Prog Dial
Prog Dial	Prog Dial
	Prog Dial
	Prog Dial

5.2. HiPath 4000 Templates

5.2.1. OpenStage 80 HFA Phone

The OpenStage 80 phone includes fixed keys to support Call Forwarding, Mute, Speaker, and Headset. And, features such as Transfer, Consult, Conference and Park are typically accessed via the menus and prompts during a call.

5.2.1.1. Template: hos80

Line
Line
Preview
Hold
Transfer
Connect
DND
Repdial
Shift

Shifted:

Repdial
Repdial
Repdial
Repdial
Repdial
Repdial
Repdial
Repdial
Shift

5.2.2. OpenStage 60 HFA Phone

The OpenStage 60 phone includes fixed keys to support Call Forwarding, Mute, Speaker, and Headset. And, features such as Transfer, Consult, Conference and Park are typically accessed via the menus and prompts during a call.

5.2.2.1. Template: hos60

Line
Line
Preview
Hold
Transfer
Connect
Repdial
Shift

Shifted:

Repdial
Repdial
Repdial
Repdial
Repdial
Repdial
Repdial
Shift

5.2.3. OpenStage 40 HFA Phone

The OpenStage 40 phone includes fixed keys to support Call Forwarding, Mute, Speaker, Redial and Headset. And, features such as Transfer, Consult, Conference and Park are typically accessed via the menus and prompts during a call.

5.2.3.1. Template: hos40

Line
Line
Hold
Transfer
Connect
Shift

Shifted:

Repdial
Repdial
Repdial
Repdial
Repdial
Shift

5.2.4. OpenStage 30 TDM Phone

The OpenStage 30 phone includes fixed keys to support Call Forwarding, Mute, Speaker, Redial and Headset. And, features such as Transfer, Consult and Conference are typically accessed via the menus and prompts during a call.

5.2.4.1. Template: hos30

Hold
Connect
Transfer
Call Log
Pickup
Station Park
Repdial
Line

5.2.5. OpenStage 20 HFA Phone

The OpenStage 20 phone includes nine fixed keys to support features such as Call Forwarding, Mute, Speaker and Redial. And, features such as Transfer, Consult, Conference and Park are typically accessed via the menus and prompts during a call.

5.2.5.1. Template: hos20

There are no programmable keys on OpenStage 20 phones, but this template still provides My Phone help for the nine fixed function keys and the navigator.

5.2.6. OpenStage 15 HFA Phone

The OpenStage 15 phone includes fixed keys to support Speaker and Mailbox/Messages. And, features such as Transfer, Consult and Conference are typically accessed via the menus and prompts during a call.

5.2.6.1. Template: hos15

Hold
Connect
Transfer
Call Forward
Pickup
Mute
Repdial
Line

5.2.7. optiPoint 420 Standard Phone

The optiPoint 420 Standard phone includes 12 programmable keys and three navigation keys.   Features such as Consult, Transfer, Conference and Station Park may be accessed via the optiGuide menu during a call.

5.2.7.1. Template: hop420std

Messages	Prog Dial
Forward	Prog Dial
Hold	Missed Calls
Speaker	Consult/Xfer
Mute	Repeat Dial
	Cancel/Rel
	Shift

Shifted:

Prog Dial	Prog Dial
Prog Dial	Prog Dial
Prog Dial	Prog Dial
Prog Dial	Prog Dial
Prog Dial	Prog Dial
	Prog Dial
	Shift

5.3. HiPath 3000 Templates

5.3.1. optiPoint 500 Advance Phone

The optiPoint 500 Advance phone includes 19 programmable keys and three navigation keys. Features such as Hold, Consult and Conference may be accessed via the optiGuide menu during a call.

5.3.1.1. Template: op500adv

Program	Mailbox
Redial	Speed
Mute	Pickup Dir
Speaker	Pickup Grp
	Speaker
	Connect
	Callback
	Conference
	Hold
	Consult
	Forward
	DND
	Repdial
	Release
	Line

5.3.2. optiPoint 500 Standard Phone

The optiPoint 500 Standard phone includes 12 programmable keys and three navigation keys.   Features such as Hold, Consult and Conference may be accessed via the optiGuide menu during a call.

5.3.2.1. Template: op500std

Program	Mailbox
Redial	Speed
Mute	Pickup Dir
Speaker	Park
	Hold
	Release
	Forward
	Line

5.3.3. optiPoint 420 Standard Phone

The optiPoint 420 Standard phone includes 12 programmable keys and three navigation keys.   Features such as Hold, Consult and Conference may be accessed via the optiGuide menu during a call.

5.3.3.1. Template: op420std-1

Messages	Prog Dial
Forward	Prog Dial
Hold	Missed Calls
Speaker	Consult/Xfer
Mute	Repeat Dial
	Cancel/Rel
	Shift

Shifted:

Prog Dial	Prog Dial
Prog Dial	Prog Dial
Prog Dial	Prog Dial
Prog Dial	Prog Dial
Prog Dial	Prog Dial
	Prog Dial
	Shift