# QuickStart
for **Unify OpenScape Voice, HiPath 4000 & HiPath 3000**

PhoneGuide LIVE! can be highly customized to meet diverse sets of operating environments and user requirements. This QuickStart guide will help you get PhoneGuide LIVE! up and running quickly, utilizing and enabling the most commonly used set of features and functions. For full details on how PhoneGuide LIVE! can be customized, please refer to the Installation and Configuration Guide. Know that PhoneGuide LIVE! can be customized after its initial installation.

PhoneGuide LIVE! is a web-based application. ❶PhoneGuide LIVE! is first loaded on a web server, which will also act as the Administrator Workstation. ❷When the switch configuration is available, PhoneGuide LIVE! extracts data from the HiPath Manager or HiPath 4000 switch(es) to create personalized training for each HiPath 4000 end user. For OpenScape Voice implementations, PhoneGuide LIVE! extracts information from the OpenScape Voice Management server. ❸End users are then able to access a designated URL and the learning process begins with the overviews and feature-specific instruction. Note: For OpenScape Voice users, each time a user logs in updated phone information is retrieved from their phone.

| Web Server & Administrator Workstation | HiPath Manager | or | HiPath 4000 Switch | OpenScape Voice Management Server |

End User Web Clients

End User Phones
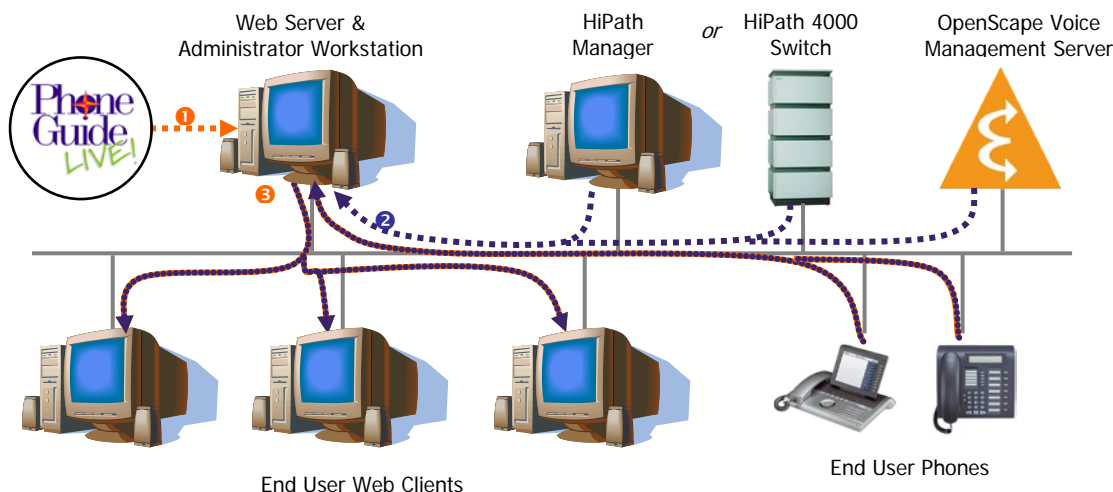
| Pre-Install | Equipment Required | 5-60 Minutes |

Web Server/Administrator Workstation
- Pentium 4 – 3 Ghz or greater
- 2 GB RAM
- 40 GB Disk Space
- 100 Mbs Network Interface Card
- Windows 2003 Server Service Pack 1 or Windows Server 2008 R1 or R2 (Standard Edition or Enterprise Edition)
- .NET Framework v3.5.1
- Internet Information Services (IIS)
- Microsoft Internet Explorer 6.0 or later

End User Web Client
- Pentium 3 – 1 Ghz or greater
- 512 MB RAM or 1 GB for Windows 2003 Server
- 200 MB of Disk Space
- Windows XP Professional Service Pack 2, Windows 2003 Server Service Pack 1, or Windows Server 2008 R1 (Standard Edition or Enterprise Edition)
- Microsoft Internet Explorer 7.0 or later

- High speed internet connection
- Adobe Flash Player 8.0 or later
- Adobe Acrobat Reader
- Sound card with speakers or headphones
- 4 MB video card, high color, 1024x768 resolution

Pre-Install	Information Needed Before Starting Installation	15-60 Minutes

HiPath 4000 Switch or HiPath Manager for 4000 only

Activate XIE and note the IP address for HiPath 4000 or HiPath Manager.

Enter here for future reference _____ . _____ . _____ . _____

If not known, ask your network administrator or Unify technical representative.

OpenScape Voice (OSV) only

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

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.

DNS Name for PhoneGuide LIVE! Server

As part of the URL for your users to access PhoneGuide LIVE!, you will need DNS Name or IP Address of the server on which PhoneGuide LIVE! is being installed. Using a DNS name will let you avoid having to edit this information if the IP address changes in the future.

Voice Mail System Type (If Applicable)

If you want to include instruction for Xpressions 4.0, 5.0 or 6.0, you will need the default initial password and other access numbers, such as the direct access numbers for internal or external use, the guest access number and the universal access number. If you have another voice mail system type and want to include instruction, you will need the network file location or URL that points to instructions on using the voice mail system.

E-mail Addresses for End Users

During the server installation process, PhoneGuide LIVE! provides a link that can be sent via e-mail to end users for launching the PhoneGuide LIVE! from their desktops. For all end users, you will need their e-mail addresses or the name of the e-mail distribution list.

Step 1	Install and Configure PhoneGuide LIVE! on Server	15-30 Minutes

1. Insert PGL Disk 1.

2. An Install Shield Wizard should auto start; if not, browse to the Setup.msi file on the CD.
   - Enter the CD Key found on the PhoneGuide LIVE! CD package.
   - Read and indicate your acceptance of License Agreement.
   - A series of screens follow.
     - Only one screen may require your input. For all others, accept the defaults by simply selecting Next to proceed.
     - When prompted for the server's DNS or IP address, please type in one or the other. Note that the input field will default to the computer name which may or may not match the DNS name. Select Next to proceed.
     - During the installation process, a prompt to insert PGL Disk 2 will appear. After inserting Disk 2, click OK to continue.
     - Shortly after, a prompt to insert PGL Disk 3 will appear. After inserting Disk 3, click OK to continue.
     - When notified that the Install Shield Wizard is complete, select Finish. This initiates a copying process that takes several minutes.

3. Before you are ready to start the PhoneGuide LIVE! Administrator, enable ASP.NET on the server and ensure that the .FLV files (the video training files) will stream properly.

- 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.
- Windows 2003 to enable ASP.NET, go to the Control Panel and access the Administration Tools options. Select the Internet Information Systems (IIS) option. When the IIS Manager 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 the Server Side Includes option is allowed.
- Below is a workaround to remedy the known issue that FLV files will not stream properly when placed on a Microsoft Windows 2003 server.
  - On the Windows 2003 server, open the Internet Information Services Manager.
  - Right-click the local computer server and select Properties.
  - Select the MIME Types tab.
  - Click the New... button and enter the following information:
    - Associated Extension box: .FLV
    - MIME Type box: flv-application/octet-stream
  - Click OK to close the Associated Extension window and then click OK again to close the MIME Types tab.
  - Restart the World Wide Web Publishing service. To restart it...
    - Go to Control Panel and select the Administrative Tools option.
    - Go to Services, find the Internet Information Services Manager option and highlight the option. You will now see an option to restart the service in the window or you can right-click on Services to get a menu of options, including the Restart option.
    - Select the Restart option to restart the World Wide Web Publishing service. Now FLV will stream properly for your PhoneGuide LIVE! users.

4. Launch PhoneGuide LIVE! Administrator (default username is *phoneguide* and password is *impact*) and register PhoneGuide LIVE!. This is required to authenticate the license.

5. After registration, go to the File menu and select the New User Group option. The User Group Wizard will display and launch a series of three (3) main screens. Each screen contains a variety of options for customizing PhoneGuide LIVE!'s operating parameters. Only those fields noted below require a selection or input. For all other fields the default can be used. To learn more about the other fields and their options please refer to the Installation and Configuration Guide.
   - Defining Basic User Group Properties
     - Enter Name and Description
     - Switch Type: Select HiPath 4000,   HiPath 3000, or OpenScape Voice
     - Voice Mail Type: Select Xpressions 4.0, Xpressions 5.0, Xpressions 6.0, Other or None.
     - Select Next to proceed.
   - Defining Switch Properties
     - (HiPath 4000 only) Click on Servers to add a server and enter name and IP address.
     - (OSV only) Click on Servers to add a server and enter name, user name, password and URL.
     - (OSV only) Select server from Server drop-down list and click on Select Switch. Validate Switch and Business Group fields are populated as needed. For simplest setup, select <Default> from the Business Group field.
     - (HiPath 4000 only) Define the station extensions that will be included, such as 1400-1425, 1429. If left blank, all extensions will be included.
     - Review and modify Switch Features or accept the defaults and select Next to proceed.
   - Defining Voice Mail Properties
     - If you selected Xpressions 4.0, 5.0 or 6.0 for Voice Mail Type:
       - Enter the default initial password and other access numbers, such as the direct access numbers for internal or external use, the guest access number and the universal access number. You may leave blank and configure later.
       - Review and modify Voice Mail Features or accept the defaults and select Finish.
     - If you selected Other for Voice Mail Type:

- 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 and select Finish.
  - Upload Custom Logo (optional)
    - If you are interested in uploading your company logo into the lower left corner of the PhoneGuide LIVE! web interface, you may do so easily.
      - From the Administrator window, go to the System menu and select Upload Custom Logo.
      - A dialogue box will appear, and you can either hit the Clear Logo button to remove the logo entirely from the web interface, OR
      - Customize the logo by typing in the location of the logo file you wish to upload or by clicking the ellipses button to browse for it.
      - Click OK to save changes.
    - For any logo changes to take effect, users 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.

If you have configured PhoneGuide LIVE! for a HiPath 4000 switch, you can now import your phone information from the switch into PhoneGuide LIVE!. If you configured for a HiPath 3000 or an OpenScape Voice, you will not perform an import. You may, however, modify phone template logins for all three switch types if you feel login names other than the defaults would be helpful to your users. For OpenScape Voice users, 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.

Step 2	Import Phones (HiPath 4000 only)	5-30 Minutes

Note: If PhoneGuide LIVE! is being used in conjunction with a new switch installation, this step should not be done until the switch configuration has been completed.

1. From the PhoneGuide LIVE! Administrator window, select the File – Import Phones option.
2. Select the switch you want to import from by clicking on the check box to the left of the switch name. Select Import and a window informing you of your license status will display.

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!.

Step 3	Send E-Mail to End Users to Access PhoneGuide LIVE!	5-30 Minutes

1. Go to the Help menu in PhoneGuide LIVE! Administrator and select Client URL. The Client URLs window displays.
2. Copy the URL and paste into an e-mail message for your users. In addition to the URL, the e-mail message should inform the user that they will simply need their extension number to log in.

Step 4	User Login	0 Minutes

1. When the end user selects the hyperlink from the e-mail, a login screen will appear. OpenScape Voice users will enter their complete telephone number (for international customers, this includes country code) and click on Login. HiPath 4000 users will enter their extension and click on Login. HiPath 3000 users will enter an extension/user name associated with the appropriate phone template and click on Login. Upon first login, the user will be immediately directed to the Getting Started video instruction.
2. The next time the user launches PhoneGuide LIVE!, they will be automatically directed to the My Phone page with a picture of their own phone. HiPath 4000 and OpenScape Voice users will see telephone features indicated for each button as it is configured in the switch. HiPath 3000 users will see a predefined template of the phone type they use.

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