



NetVanta Unified Communications

**NetVanta Unified Communications Server
Presence and Control Components Guide**

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Conventions

**NOTE**

Notes provide additional useful information.

**CAUTION**

Cautions signify information that could prevent service interruption or damage to equipment.

WARNING

Warnings provide information that could prevent injury or endangerment to human life.

Table of Contents

1 Introduction	3
Key Features	3
2 Prerequisites	5
Installation and Configuration Sequence	5
Server Requirements	5
3 Installing and Configuring NetVanta UC Server Presence and Control	7
Overview	7
Standalone Deployment	7
Distributed or Associate Deployment	8
Installing on a Standalone NetVanta UC Server	9
Installing UC Server Presence Components	10
Configuring Windows Firewall	10
Installing NetVanta UC Server	11
Configuring UC Server SIM	11
Configuring CSTA Bridge	12
Configuring UC Server with a SIP PBX	12
Restarting the CSTABridge and UC Server SIM Services	13
Setting the ucCompanion Administrative Passwords	13
Installing on an Associate NetVanta UC Server	15
Installing UC Server Presence Components on the Associate UC Server	15
Installing NetVanta UC Server	15
Configuring UC Server SIM on the Associate UC Server	16
Configuring CSTA Bridge	16
Configuring NetVanta UC Server with a SIP PBX	17
Restarting the CSTABridge and UC Server SIM Services	17
4 Upgrading UC Server Presence and Control Components	19
5 ucCompanion Client Software Deployment	21
Overview	21
Prerequisites	21
Licenses	21
UC Client Installation	21
Installing ucCompanion Client Software	21
Configuring ucCompanion - Live Attendant	22
Configuring ucCompanion – Soft Phone	23
Configuring Windows Firewall to Unblock ucCompanion – Soft Phone	23
Configuring Server and User Login Information	24

Configuring External Dialing	24
ucCompanion - Live Attendant Display	24
Troubleshooting ucCompanion Client Software Deployment	25
Unable to Connect to Server	25
BLFs Turn Grey After Appearing Registered and Connected	25
6 Upgrading ucCompanion Client Software	27
7 Administering Extensions	29
Overview of Administering Extensions	29
Creating Global Extension Groups and Adding Extension Cells	31
Creating Tenant Extension Groups and Adding Extension Cells	33
Creating New Extension Cells	36
Editing Extension Cell Settings	38
Setting Tenant Extension Access Rights	39
Sorting Extension Groups	41
Changing How Extension Cells are Displayed	41
Deleting Extension Groups	42
Deleting Extension Cells	42
Resetting the Password for an Extension	42
8 Glossary	45

1 Introduction

ucCompanion is an optional desktop application that provides customers with a presence-based console, an integrated soft phone and a suite of collaboration features. Direct calls quickly with visual call routing to the right employee the first time using ucCompanion - Live Attendant™ — UC server's presence-based console. ucCompanion delivers presence right down the desktop. Integrated Busy Lamp Fields (BLF), name searching, and high volume desktop telephony reduce the amount of time operators spend directing calls. Employees can see which of their co-workers are available to take a call. ucCompanion enhances productivity with desktop telephony, click to call, contact integration, screen pops, an integrated soft-phone and more.



Currently only ucCompanion - Live Attendant is available for general deployment.

Use of the ucCompanion -Live Attendant application is optional. However, if you wish to use ucCompanion - Live Attendant then you must install the UC Server Presence and Control Components, which consists of the UC Server Presence and Control Engine (PCE), and the Server Interface Module (SIM). The UC Server Presence and Control Components interact with NetVanta UC Server via the CSTA bridge software, which is automatically installed as part of UC server.

This guide is written for installers and maintainers of NetVanta UC Server and NetVanta ucCompanion products. It assumes familiarity with general hardware and software installation procedures. This guide is also intended for Microsoft Professionals and trained professionals to install and configure the NetVanta Unified Communications Server.

Key Features

- Integrated with ucCompanion soft phone
- ucCompanion – Live Attendant (Console)
- ucCompanion Instant Messaging
- Enterprise Busy Lamp Field (BLF)
- New call notification
- Call logs
- Add comments to calls
- Make calls
- Answer calls
- Hang up Calls
- Swap calls
- Hold / Un-hold
- Transfer – Assisted

- Transfer – Blind
- Call Pickup (Ringing Call Pickup)
- Call Park / Call Park Pickup
- Status Notes
- Send to Voicemail

2 Prerequisites

Installation and Configuration Sequence

Installing and using the ucCompanion - Live Attendant application is optional. However, if you wish to use ucCompanion - Live Attendant, then you must install the UC Server Presence and Control Components, which consists of the UC Server Presence and Control Engine (PCE), and the Server Interface Module (SIM).

The installation and configuration of UC server and the UC Server Presence and Control Components must occur in the following order:

1. Start the UC server installation. Refer to the *NetVanta Unified Communications Server Installation Guide* for instructions.
2. When prompted, install the UC Server Presence and Control Components. Refer to the installation instructions for either [Installing UC Server Presence Components on page 10](#) for a standalone server, or [Installing UC Server Presence Components on the Associate UC Server on page 15](#) for a centralized SIM environment.
3. Configure Windows firewall. For more information refer to [Configuring Windows Firewall on page 10](#)
4. Continue installing UC server as described in the *NetVanta Unified Communications Server Installation Guide*.
5. Configure the UC Server SIM. Refer to the relevant section, either [Configuring UC Server SIM on page 11](#) for a standalone server or [Configuring UC Server SIM on the Associate UC Server on page 16](#).
6. Configure the CSTA Bridge. Refer to the relevant section, either [Configuring CSTA Bridge on page 12](#) for a standalone server, or [Configuring CSTA Bridge on page 16](#) for an associate server.
7. Configure UC server with a SIP PBX, using the Server Configuration Wizard. For more information refer to the *NetVanta Unified Communications Server Configuration Guide*.
8. Stop and restart the CSTABridge and UC Server SIM services in the order recommended. Refer to the relevant section, either [Restarting the CSTABridge and UC Server SIM Services on page 13](#) for a standalone server, or [Restarting the CSTABridge and UC Server SIM Services on page 17](#) for an associate server.
9. Set the ucCompanion Administrator and Tenanted passwords. Refer to [Setting the ucCompanion Administrative Passwords on page 13](#).

Server Requirements

For a standalone installation, both the UC Server PCE and the SIM are installed on the same hardware platform as UC server. If you are installing on an associate server, you need to install only the SIM on the associate UC server hardware platform.

3 Installing and Configuring NetVanta UC Server Presence and Control

Overview

Refer to the following sections for information on deploying UC Server Presence and Control in a standalone or a distributed environment.

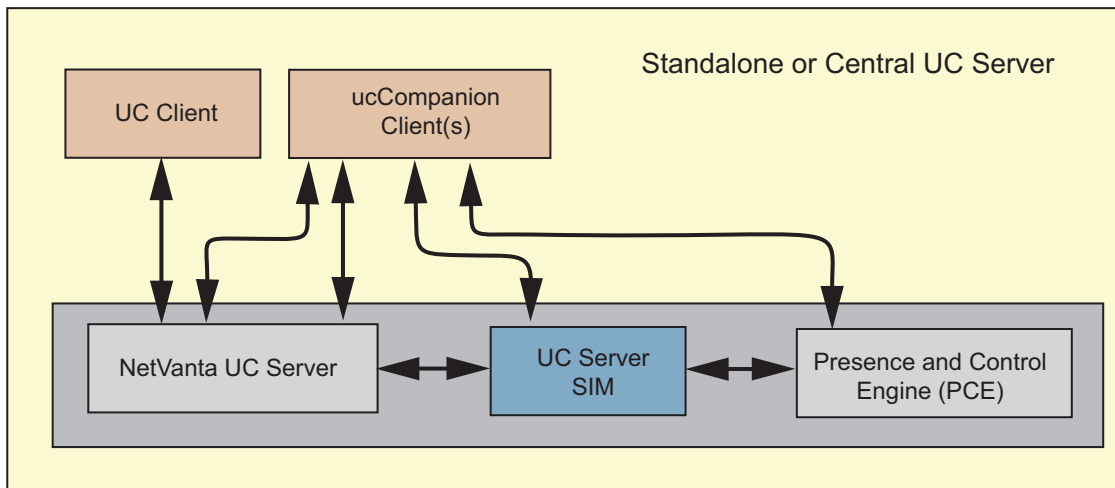
- [Standalone Deployment on page 7](#)
- [Distributed or Associate Deployment on page 8](#)

Standalone Deployment

UC Server Presence and Control can be configured to operate in a standalone environment. The required components of the standalone environment include the following:

- NetVanta UC Server
- CSTA Bridge
- NetVanta Presence and Control Engine (PCE)
- UC Server SIM

The UC server and CSTA bridge software are included within the UC server installation media. The Presence and Control Engine and SIM are included on the UC Server Presence and Control installation media.

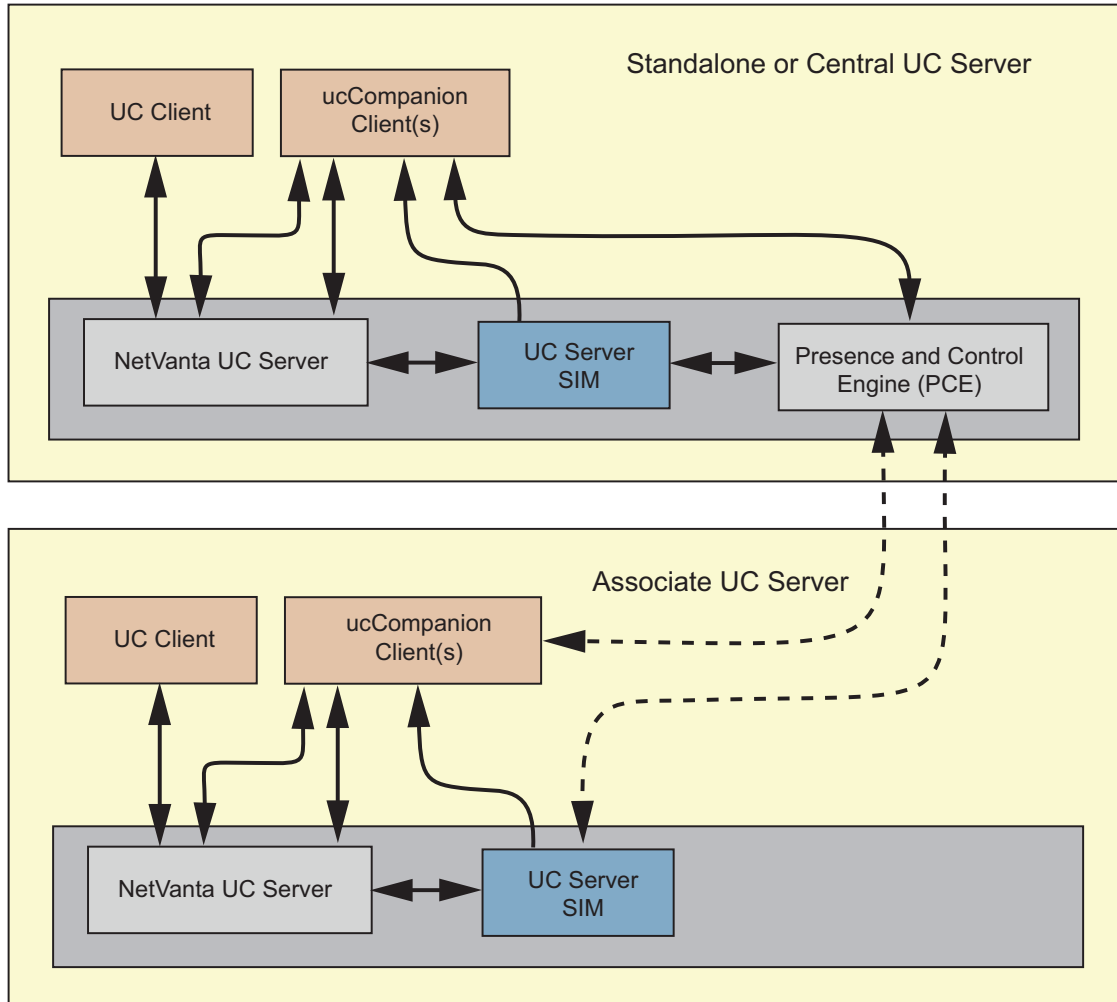


Distributed or Associate Deployment

UC server can provide centralized, enterprise wide presence and collaboration services by using the UC Server Presence and Control Engine (PCE) on a centralized UC server to support associate UC servers in a distributed system. Such satellite UC servers can be used to build larger co-located systems for scalability, or physically distributed where UC servers are typically located in branch offices. Within distributed organizations a single, centralized server can support presence and collaboration services on multiple co-located or remotely located associate UC servers. Since associate UC servers employ the PCE on a centralized server, the PCE component is not installed on associate UC servers, and is used to send presence and call control information from the associate UC server to the central UC server.

ucCompanion clients connected to associate UC servers are automatically configured to connect the UC Server Presence and Control engine at the main location by the SIM in their associate UC server.

When UC server is configured to operate in the associate mode of operation, it does not need the Presence Control Engine (PCE) or the Database Server installed, as it employs the PCE at the central UC server. Only the SIM component of the UC Server Presence and Control Components must be installed on the associate UC server to mediate the connection to the PCE at the central UC server. When you install the SIM in the associate UC server, change the IP address so that it connects to the PCE at the central UC server rather than to the associate UC server. The installation instructions for installing UC server are the same for both the central UC server site and the associate UC server. See the graphic below for the differences between installing UC Server Presence and Control in a central UC server, and an associate UC server.



ucCompanion is configured somewhat differently depending on whether it is installed on a standalone or on an associate UC server. Follow the appropriate instructions for your particular environment.

Installing on a Standalone NetVanta UC Server

After you start the UC server installation, you are prompted to install the UC Server Presence Components. The UC Server Presence Components installation requires the following steps:

1. [Installing UC Server Presence Components on page 10](#)
2. [Configuring Windows Firewall on page 10](#)
3. [Installing NetVanta UC Server on page 11](#)
4. [Configuring UC Server SIM on page 11](#)
5. [Configuring CSTA Bridge on page 12](#)

6. [Configuring UC Server with a SIP PBX on page 12](#)
7. [Restarting the CSTABridge and UC Server SIM Services on page 13](#)
8. [Setting the ucCompanion Administrative Passwords on page 13](#)

Installing UC Server Presence Components

Install the UC Server Presence Components on the same computer as the UC server software.

1. Log on to UC server, locally or using Remote Desktop, using a local administrator account or an account with the equivalent permissions.
2. Insert the UC server media.
3. Enable **Install Presence Components to provide ucCompanion Live Attendant clients connectivity to UC Server**.
4. Select **Install Presence Components**.
5. On the Welcome page click **Next**.
6. Read the license agreement and if you agree then enable **I accept the terms in the License Agreement**, and click **Next**.
7. On the Custom Setup page click **Next**.
8. On the Install page click **Install**.
9. On the Completion page click **Finish**.



If you are installing and configuring the PCE on a system where UC server already exists, and a SIP PBX has already been installed and configured, then the PCE services are set to Manual and stopped. In this situation you must change the services to Automatic and start them.

Configuring Windows Firewall

On Windows systems, Windows Firewall is typically enabled by default, with the exception of Windows Server 2003 where Windows Firewall is typically disabled. Windows Firewall controls access to server processes from programs running on other computers. For Presence Components you must manually configure the firewall on the computer running Presence Components to allow access from other computers. Specifically, you must enable an exception in the firewall to allow VistaTDS.exe to be accessed from external computers.



If Windows Firewall checking is enabled on the server, and an exception for VistaTDS is not enabled, then ucCompanion running on external computers will be unable to access the Presence Components.

Follow the steps below to modify the firewall from the command line using netsh.



Alternatively, you can configure Windows Firewall through the Control Panel.



To modify Windows Firewall, you must be logged into an account with the necessary privileges.

To configure Windows Firewall from the command line using netsh

1. Open a command prompt. For example, depending on the operating system the path will be the same or similar to **Start > Programs > Accessories > Command Prompt**.
2. In the command line type the following command as one line:

```
netsh firewall add allowedprogram "C:\Program  
Files\ADTRAN\NetVanta ucCompanion\Server\VistaTDS.exe" VistaTDS ENABLE
```



If VistaTDS.exe is installed in a different location, then adjust the command line above accordingly.

Installing NetVanta UC Server

Install NetVanta UC Server, but do not start configuring UC server. For more information refer to the *NetVanta Unified Communications Server Installation Guide*.

Configuring UC Server SIM

UC server SIM maintains the connection between the ucCompanion server and UC server. For a standalone UC server the default values are normally correct and do not need to be changed. However, if you have two or more network interface cards (NICs), then ensure that the settings below are pointing to the correct network interface.

To verify the SIM Startup and connection options

1. Select **Start > Programs > ucCompanion > PCE Administration**.
2. Select the **SIM** tab.

3. In the **Server Address** field, verify that the default is the host name or IP address of the Presence and Control Engine Server.



Ensure that the address you specify is correct, as no direct feedback is provided if an incorrect name or address is entered.

4. In the Telephony Server section, verify the UC server host name or IP address.
5. In the Server Port field, verify the port is set to **6055**.
6. If any changes were made to the default settings then click **Save**.
7. Close the dialog.

Configuring CSTA Bridge

1. Navigate to the following directory on the UC server:
 \Program Files\ADTRAN\UC Server\bin
2. Open the **CstaBridge.exe** config file using a text editor, such as Notepad.
3. Locate the following sections and make the changes as shown below.
 - a. Replace 127.0.0.1 with the IP address of the UC server computer.

```
<setting name="SoapInterfaceUrl" serializeAs="String">  
        <value>http://127.0.0.1:8445/axis/servlet/AxisServlet</value>  
    </setting>
```
 - b. Replace localhost with the IP address of the UC server computer.

```
<setting name="ResourceManagerHost" serializeAs="String">  
        <value>localhost</value>  
    </setting>
```
4. Select **File > Save**. This saves the file with the config file extension.
5. Select **File > Exit**.

Configuring UC Server with a SIP PBX

Configure UC server using the Server Configuration Wizard. Complete all the steps in the wizard including configuring the UC server communication system. For more information refer to the *NetVanta Unified Communications Server Configuration Guide*.

Restarting the CSTABridge and UC Server SIM Services

All services will appear started and set to Automatic. In order to enable the configuration changes for the CSTA Bridge, stop and restart the following services in the order listed below.



If you are installing and configuring the PCE on a system where UC server already exists, and a SIP PBX was already installed and configured, then the PCE services are set to Manual and stopped. In this situation, if you have not already done so, then you must change the services to Automatic and start them.

To stop the services

1. Using the Services.msc, stop the **ADTRAN UC Server CSTA Bridge** service.
2. Select **Start > Programs > ucCompanion > PCE Administration**.
3. Select the **Presence and Control Engine** tab.
4. Select **Stop**. This also stops the Database Access service.
5. Select the **SIM** tab.
6. Select **Stop**. This stops the UC server SIM service.

To restart the services

1. Using the Services.msc, start the **ADTRAN UC Server CSTA Bridge** service.
2. Select **Start > Programs > ucCompanion > PCE Administration**.
3. Select the **Database Access** tab.
4. Select **Start**. This starts the UC Server Database Access service, as well as the Presence and Control Engine service.
5. Select the **SIM** tab.
6. Select **Start**. This starts the UC Server SIM service.

Setting the ucCompanion Administrative Passwords

The ucCompanion Administrative Passwords provide management and configuration of ucCompanion client behavior, and are configured after the installation. To configure the passwords, follow the steps below.

To set the ucCompanion Administrator password

1. Select **Start > Programs > ucCompanion > PCE Administration**.
2. Select the **Database Access** tab.
3. From the Database Maintenance drop-down list select **Reset administrator password**.
4. Select **Perform**.

5. Type a password in the **System Administrator New password** field, and then re-type the password to confirm.
6. Select **OK**.

To set the ucCompanion Tenanting Administrator password

1. From the Database Maintenance drop-down list select **Reset tenanting administrator password**.
2. Select **Perform**.
3. Type a password in the System Tenant New password field, and then re-type the password to confirm.
4. Select **OK**.

Installing on an Associate NetVanta UC Server

The associate UC server installation requires the following steps:

1. [Installing UC Server Presence Components on the Associate UC Server on page 15](#) – select the SIM only
2. [Installing NetVanta UC Server on page 15](#)
3. [Configuring UC Server SIM on the Associate UC Server on page 16](#)
4. [Configuring CSTA Bridge on page 16](#)
5. [Configuring NetVanta UC Server with a SIP PBX on page 17](#)
6. [Restarting the CSTABridge and UC Server SIM Services on page 17](#)

Installing UC Server Presence Components on the Associate UC Server

On the same computer as the associate UC server, install the UC Server Presence and Control Components, selecting the UC SIM component only, using the following steps.

1. Log on to UC server, locally or using Remote Desktop, using a local administrator account or an account with the equivalent permissions.
2. Insert the UC server CD.
3. Enable **Install Presence Components to provide ucCompanion Live Attendant clients connectivity to UC server.**
4. Select **Install Presence Components.**
5. On the Welcome page click **Next.**
6. Read the license agreement and if you agree then enable **I accept the terms in the License Agreement,** and click **Next.**
7. On the Custom Setup page select the **UC SIM** component only, and click **Next.**
8. On the Install page click **Install.**
9. On the Completion page click **Finish.**



If you are installing and configuring the PCE on a system where UC server already exists, and a SIP PBX has already been installed and configured, then the PCE services are set to Manual and stopped. In this situation you must change the services to Automatic and start them.

Installing NetVanta UC Server

Install UC server, but do not start configuring UC server. For more information refer to the *NetVanta Unified Communications Server Installation Guide*.

Configuring UC Server SIM on the Associate UC Server

UC server SIM maintains the connection between the ucCompanion server and UC server.

To configure and verify the SIM Startup and connection options

1. Select **Start > Programs > ucCompanion > PCE Administration**.
2. Select the **SIM** tab.
3. For the Server Address, change the default value to the IP address or host name of the central UC server.



Ensure that the address you specify is correct, as no direct feedback is provided if an incorrect name or address is entered.

4. For the telephony server, verify the IP address or host name of the associate UC server.
This is the IP address or host name of the CSTA bridge on the associate UC server. The default value is normally correct and does not need to be changed. However, if you have two or more network interface cards (NICs), then verify this setting to ensure that it points to the correct network interface.
5. In the Server Port field, verify the port is set to **6055**.
6. Select **Save**, and close the dialog.

Configuring CSTA Bridge

1. Navigate to the installation folder on the UC server: the default location is:
`\Program Files\ADTRAN\UC Server\bin`
2. Open the **CstaBridge.exe** config file with a text editor, such as Notepad
3. Locate the following sections and make the changes as shown below.
 - a. Replace 127.0.0.1 with the IP address of the associate UC server computer.

```
<setting name="SoapInterfaceUrl" serializeAs="String">  
  <value>http://127.0.0.1:8445/axis/servlet/AxisServlet</value>  
</setting>
```
 - b. Replace localhost with the IP address of the UC server computer.

```
<setting name="ResourceManagerHost" serializeAs="String">  
  <value>localhost</value>  
</setting>
```
4. Select **File > Save**. This saves the file with the config file extension.
5. Select **File > Exit**.

Configuring NetVanta UC Server with a SIP PBX

Configure UC server using the Server Configuration Wizard. Complete all the steps in the wizard including configuring the UC server communication system. For more information refer to the *NetVanta Unified Communications Server Configuration Guide*.

Restarting the CSTABridge and UC Server SIM Services

All services will appear started and set to Automatic. In order to enable the configuration changes for the CSTA Bridge, stop and restart the following services in the order listed below.



If you are installing and configuring the PCE on a system where UC server already exists, and a SIP PBX has already been installed and configured, then the PCE services are set to Manual and stopped. In this situation, if you have not already done so, then you must change the services to Automatic and start them.

To stop the services

1. Using the Services.msc, stop the **ADTRAN UC Server CSTA Bridge** service.
2. Select **Start > Programs > ucCompanion > PCE Administration**.
3. Select the **Presence and Control Engine** tab.
4. Select **Stop**. Stopping the Presence and Control Engine service also stops the Database Access service.
5. Select the **SIM** tab.
6. Select **Stop**. This stops the UC server SIM service.

To restart the services

1. Using the Services.msc, start the **ADTRAN UC Server CSTA Bridge** service.
2. Select **Start > Programs > ucCompanion > PCE Administration**.
3. Select the **Database Access** tab.
4. Select **Start**. This starts the UC server Database Access service, as well as the Presence and Control Engine service.
5. Select the **SIM** tab.
6. Select **Start**. This starts the UC server SIM service.

4 Upgrading UC Server Presence and Control Components

Install the UC Server Presence and Control components on the same computer as the UC server software.

1. Log on to UC server, locally or remotely, using a local administrator account or an account with the equivalent permissions.
2. Insert the UC server media.
3. Close the installation launcher if it starts automatically. The launcher is not used for this upgrade.
4. Select **Start > Run**.
5. Enter `cmd`, and click **OK** to open a command prompt window.
6. Change the directory to the folder \Server folder of the installation media.
7. At the command prompt type the following command:

```
msiexec /i "NetVanta Unified Communications Server - Presence Components.msi" REINSTALL=ALL REINSTALLMODE=vomus
```
8. On the Resuming the NetVanta UC Server Presence and Control Components Setup Wizard page, click **Install**.
9. On the Completed the NetVanta UC Server Presence and Control Components Setup Wizard page, click **Finish**.
10. At the UC Server SIM : ucCompanion Connection dialog, confirm your server information. Select **OK**.

5 ucCompanion Client Software Deployment

Overview

For successful ucCompanion client software deployment, refer to the following sections:

- [Prerequisites on page 21](#)
- [Installing ucCompanion Client Software on page 21](#)
- [Configuring ucCompanion - Live Attendant on page 22](#)
- [Configuring ucCompanion – Soft Phone on page 23](#)
- [Configuring External Dialing on page 24](#)
- [ucCompanion - Live Attendant Display on page 24](#)
- [Troubleshooting ucCompanion Client Software Deployment on page 25](#)

Prerequisites

Licenses

You must have the sufficient client licenses for each instance of the client software that you plan on deploying. UC server separately licenses ucCompanion – Live Attendant.

To confirm the available client licenses

1. Login to UC Client as an administrator.
2. Navigate to **Help > License Information**.

UC Client Installation

NetVanta UC Client must be installed on the client computer prior to installing ucCompanion or ucCompanion – Live Attendant.

Installing ucCompanion Client Software

Ensure that you *only* select ucCompanion – Live Attendant.

- ucCompanion – Live Attendant is designed for operators, and enables them to view and control calls on all extensions in the system.



ucCompanion and ucCompanion - Plug-in for Outlook are for previewing only. They are in beta format and are not currently supported.

The ucCompanion - Live Attendant client software is located on the NetVanta UC Server installation media:

1. Log on to the client computer using a local administrator account or an account with the equivalent permissions.
2. Insert the UC server media.
3. If the installation launcher starts automatically, it may be closed because it is not used for this installation.
4. Navigate to the \Client folder, and then double-click **ADTRAN ucCompanion.msi**.
5. On the Welcome page click **Next**.
6. On the License Agreement page, read the license agreement, and if you agree then enable **I accept the terms in the License Agreement**, and click **Next**.
7. On the Custom Setup page click **Next**.
8. On the Ready to install NetVanta ucCompanion page click **Install**.
9. When the installation is completed, click **Finish**.

Configuring ucCompanion - Live Attendant

Follow the steps below to configure ucCompanion – Live Attendant.

1. Select **Start > Programs > ucCompanion > ucCompanion – Live Attendant**.
When the ucCompanion – Live Attendant client launches for the first time, it prompts for user information.
2. In the User Information dialog, enter your extension in the My Extension Number field.
3. Enter your name in the My User Name field, and click **OK**.
4. At the ucCompanion: ucCompanion Connection dialog, enter the server IP address or host name in the “Host” field.



In a multiple server environment, enter the IP address or host name of the primary UC server.

5. Select **OK**.
ucCompanion – Live Attendant launches and displays your name @ extension in the title bar.
6. To do administrative tasks, select **File > Admin** login to login as your tenanting administrator or administrator. Refer to the section on [Setting the ucCompanion Administrative Passwords on page 13](#).

Configuring ucCompanion – Soft Phone

To use ucCompanion – Live Attendant, you must also run ucCompanion - Soft Phone.



Refer to the NetVanta ucCompanion User Guide for more information.

To launch ucCompanion – Soft Phone

Select **Start > Programs > ucCompanion – Soft Phone**. The ucCompanion - Soft Phone icon appears in the system tray.

To use the ucCompanion - Soft Phone, you must configure the following:

- [Configuring Windows Firewall to Unblock ucCompanion – Soft Phone on page 23](#)
- [Configuring Server and User Login Information on page 24](#)

Configuring Windows Firewall to Unblock ucCompanion – Soft Phone

If Windows firewall is enabled, then a user with administrative privileges must unblock ucCompanion – Soft Phone. When ucCompanion - Soft Phone is launched for the first time, typically a dialog appears to unblock the application, and requesting the addition of an exception to allow it through the firewall.

If ucCompanion – Soft Phone is not allowed as an exception for Windows Firewall, then when a user without administrative privileges, or with prompts turned off, logs into ucCompanion – Soft Phone, the ucCompanion - Soft Phone registers, but they will be unable to answer or make calls.

If the application is installed and configured using administrative privileges, and the ucCompanion - Soft Phone isn't launched at this time, then the exception is never requested. When users without administrative privileges then launch their ucCompanion - Soft Phone, they are unable to answer or make calls.

If Windows Firewall is enabled on the client, then launch ucCompanion - Soft Phone, and enable the firewall exception, so that users are not prevented from managing their calls due to firewall restrictions. Alternatively, you can manually configure Windows firewall on the client to accept ucCompanion – Soft Phone.

To configure Windows Firewall to allow ucCompanion – Soft Phone

1. Select **Start > Programs > ucCompanion – Soft Phone**.

The ucCompanion - Soft Phone icon appears in the system tray.

2. If you are launching the soft phone for the first time, and Windows Firewall is enabled, then you will be prompted to unblock ucCompanion – Soft Phone. Select **Unblock**.

In the Windows Firewall Settings dialog, Exceptions tab, **ucCompanion – Soft Phone** is now enabled as an exception.

Configuring Server and User Login Information

1. Select **Start > Programs > ucCompanion – Soft Phone**.
The ucCompanion - Soft Phone icon appears in the system tray.
2. If you are launching ucCompanion – Soft Phone for the first time, the ucCompanion – Select Server dialog appears. Enter the server information in the Server Name or IP Address field, or select one of the Registered Servers” from the list.
3. At the ucCompanion – Login dialog, enter the user name and password information in the Username and Password fields. Select **OK**.

Configuring External Dialing

In order to make external calls using ucCompanion – Live Attendant, you must configure the user’s phone and modem dialing properties in ucCompanion Client, such as setting your location’s area code.

1. From ucCompanion – Live Attendant, select **Settings > Options**.
2. Select the **Number Format** tab.



Do not change the maximum extension number length from the default value of 4, or the length of local phone numbers from the default value of 7.

3. Select **Dialing Properties**.
4. If your area code is not already set, then click **Edit**, and select the **Area Code Rules** tab.
5. Select **New**, and enter your area code.
6. If your area has 10 digit dialing in effect, then enable **Include the area code**.
If your area has 7 digit dialing in effect, then *do not* enable Include the area code.
7. Select **OK**.
8. Select **Apply**, and click **OK** on the Area Code Rules tab.
9. Select **Apply**, and click **OK** on the Dialing Rules tab.
10. Select **OK** on the Options dialog.

ucCompanion - Live Attendant Display

The steps above should now be completed including:

- Launching UC Client
- Launching ucCompanion - Live Attendant, and configuring the appropriate user/server settings
- Launching the softphone and authentication

Registered users' busy lamp fields (BLFs) will appear either blue or grey depending on their status.

- Registered users with a device will appear as idle (blue).
- Until the softphone logs in, the BLF of a softphone user appears inactive (grey).
- After a softphone has logged in the status changes to idle (blue).



Attendants, ring groups, and hunt groups appear as idle (grey). Phantom users (that are directed to voicemail only and not to a particular phone) do not appear in the BLF.

Troubleshooting ucCompanion Client Software Deployment

Occasionally problems may occur where ucCompanion - Live Attendant, or ucCompanion - Soft Phone do not work as expected. Refer to the following section to determine a possible cause and solution for errors that may occur. Note that the possible causes and solutions noted are not an exhaustive list.

Unable to Connect to Server

Symptoms

ucCompanion - Live Attendant is unable to connect to the server.

Cause

Windows Firewall is enabled on the server, and an exception has not been enabled for VistaTDS, so ucCompanion - Live Attendant running on external computers are unable to access Presence Components.

Solution

Follow the instructions in the section [Configuring Windows Firewall on page 10](#).

BLFs Turn Grey After Appearing Registered and Connected

Symptoms

Initially when ucCompanion - Live Attendant is launched, the Busy Lamp Fields (BLFs) appear as registered and connected. After approximately 20 seconds, all BLFs turn grey. This pattern occurs each time ucCompanion or the softphone are launched.

Cause

An incorrect host name or IP address was entered when configuring the SIM. Initially the status appears connected when actually it is not. Once the failed connection occurs, the BLFs turn grey.

Solution

Ensure that the correct host name or IP address is entered when configuring the SIM. For information on configuring the SIM in a standalone environment refer to [Configuring UC Server SIM on page 11](#). For information on configuring the SIM in an associate environment refer to [Configuring UC Server SIM on the Associate UC Server on page 16](#).

6 Upgrading ucCompanion Client Software

UC Client must already be installed.

1. Log on to client computer using a local administrator account or an account with the equivalent permissions.
2. Insert the UC server media.
3. If the installation launcher starts automatically, it may be closed because it is not used for this installation.
4. Select **Start > Run**.
5. Enter `cmd`, and click **OK** to open a command prompt window.
6. Change the directory to the \Client folder of the installation media.
7. At the command prompt type the following command:

```
msiexec /i "NetVanta ucCompanion.msi" REINSTALL=ALL  
REINSTALLMODE=vomus
```
8. On the Resuming the NetVanta ucCompanion Setup Wizard page click **Install**.
9. On the Completed the NetVanta UC Server Presence and Control Components Setup Wizard page click **Finish**.

7 Administering Extensions

Overview of Administering Extensions

The Extensions Panel in the ucCompanion clients provides an easy way to view and work with phone extensions in the system.

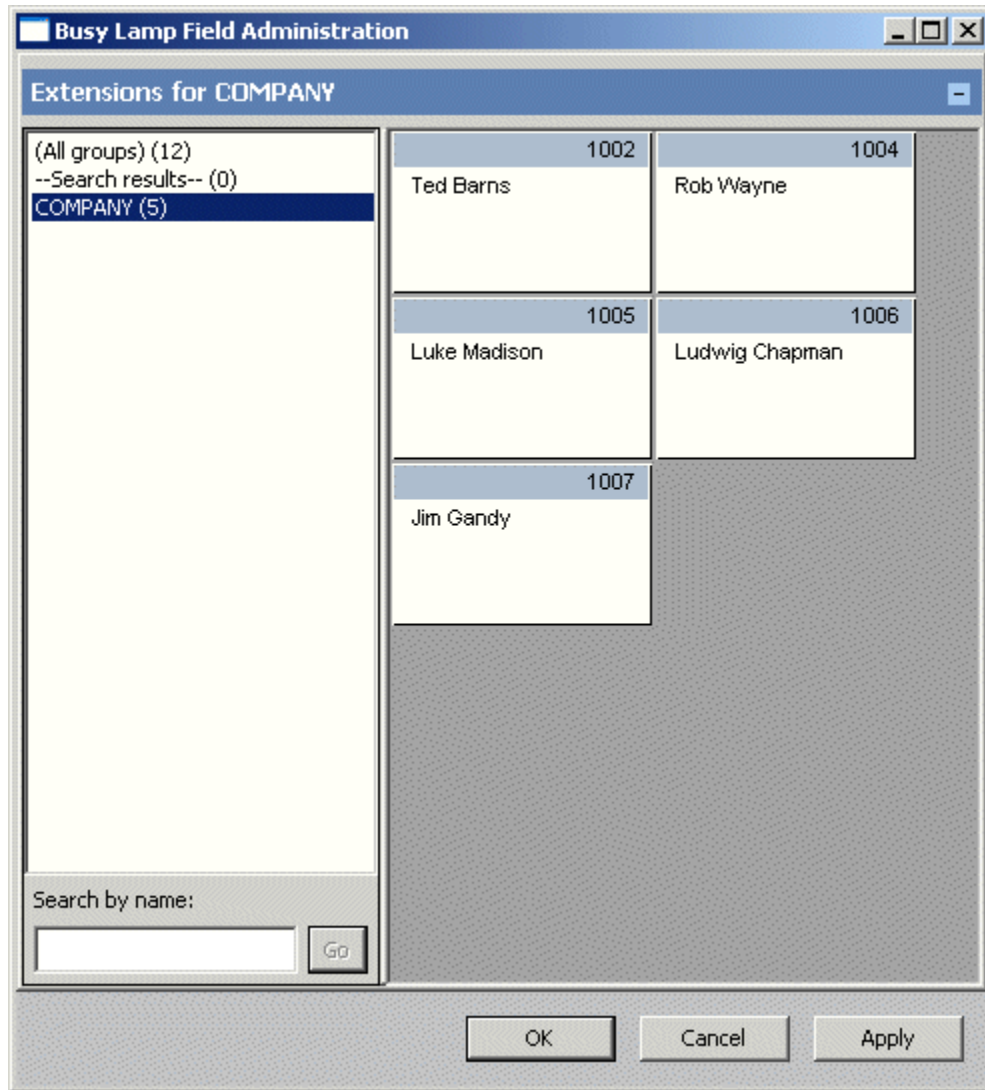
Extensions for Woodbury Office			
--Search results-- (0) (All groups) (149) ~My Group (8) ABC Company (7) Arnold (11) ATM Locations (4) Bishop (7) Citrus Heights (3) Corning (6) Downtown Office (2) Gridley (8) Loans - Auto (4)	1006 Ludwig Chapman In meetings until Noon	1315 Sue Harris Reception Out to Lunch	1554 Direct Line Agusta
	2221 Janet Jones Agusta In meetings today unti Noon	2222 Kris Krockner Agusta 11/7/2005 7:40 AM in the office all day un...	2502 Etta McCarthy Agusta Out until 11/3/05

The Extensions Panel in the ucCompanion Client

The Extension Cells that client users see in their Main Windows are administered using the BLF Administrator (the Busy Lamp Field Administration window). This is accessed through ucCompanion - Live Attendant or ucCompanion.



Make changes to Extension Cells and Extension Groups only during off-hours. If you make changes while users are connected, it may disrupt their call control or their interface display.



BLF Administrator

For example, you might create an Extension Group called TECHSUPPORT that includes all the extensions for technical support. Grouping extensions in this manner helps users to quickly locate an extension, rather than having to scroll through all available extensions.

Important Notes about the BLF Administrator

- Before using the BLF Administrator, all ucCompanion SIMs must be configured correctly.
- Only one person should be using the BLF Administrator at any one time. If more than one person tries to modify system extensions, it could cause ucCompanion database errors.

- The BLF Administrator can be run on any computer on the network. It is not necessary to run it on the main server (PCE) computer.
- If an extension has been set up to be monitored by ucCompanion but is currently out of service, its Extension Cell is gray. This allows instant feedback when a PBX connection goes down, when a user unplugs their telephone, and so on.

For more information on administering extensions, refer to the following sections:

- [Creating Global Extension Groups and Adding Extension Cells on page 31](#)
- [Creating New Extension Cells on page 36](#)
- [Editing Extension Cell Settings on page 38](#)
- [Setting Tenant Extension Access Rights on page 39](#)
- [Sorting Extension Groups on page 41](#)
- [Changing How Extension Cells are Displayed on page 41](#)
- [Deleting Extension Groups on page 42](#)
- [Deleting Extension Cells on page 42](#)
- [Resetting the Password for an Extension on page 42](#)

Creating Global Extension Groups and Adding Extension Cells

When ucCompanion is first installed, an Extension Group named **All Groups** appears in the Extension Groups list. This contains all the extensions and trunks that have been set up in the SIM to be monitored by ucCompanion.

You can create additional system-wide (global) Extension Groups, which contain a subset of monitored extensions. These system-wide Extension Groups are visible to all users. The procedure to create a system-wide Extension Group in the BLF Administrator is similar to how you create a local-only Extension Group in the ucCompanion - Live Attendant or ucCompanion.

For more information on creating global extension groups and adding extension cells, refer to [Creating Tenant Extension Groups and Adding Extension Cells on page 33](#).



In addition to the system-wide Extension Groups that you create using the BLF Administrator, clients can also create local Extension Groups that are visible on their clients only.

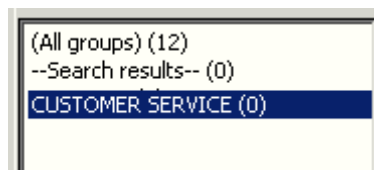
To create a system-wide Extension Group

1. In ucCompanion or ucCompanion - Live Attendant, log in as administrator. To do this, select **File > Admin Login**. Enter the Server (PCE) password. This is the password that was set when the Server component was installed.
2. In ucCompanion or ucCompanion - Live Attendant, select **Settings > Administration > Busy Lamp Field**.

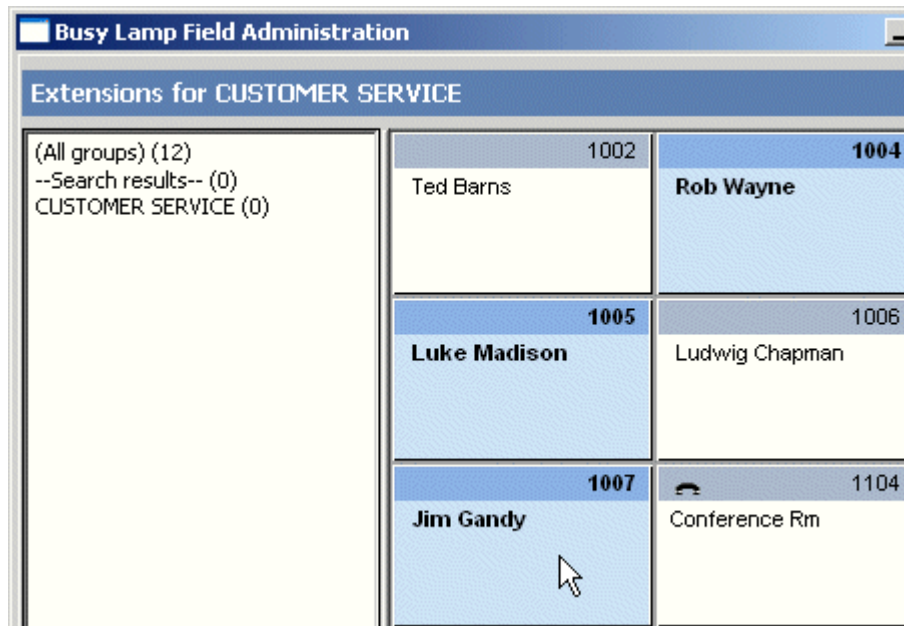


For an extension or trunk to be visible in the BLF Administrator, it must already have been added in the SIM component.

3. The BLF Administrator opens. Right-click in the Extension Group Panel and select **New Group**.
4. In the **Group Type** box, select **Regular-System Wide**.
5. In the **Group Name** box, type a name for the **Extension Group**.
6. Select **OK**. The new Extension Group is added to the list of Extension Groups.



7. The new Extension Group is empty, and you now need to add Extension Cells to it. Select the **All groups** group, and select all the extensions that you want to include in your new group. To select multiple items, **Shift + click** to select a block of cells, or **Ctrl + click** to select individual cells.



*When you create a new Extension Group, you must then add at least one Extension Cell into the group. If the new group is empty (zero cells), it is not saved when you click **OK** in the BLF Administrator.*

- After you have selected all the cells, drag and drop the Extension Cells you selected onto the new Extension Group. The cells have now been added to the Extension Group.



- Select **OK** to save your changes and exit the BLF Administrator.

Creating Tenant Extension Groups and Adding Extension Cells

When ucCompanion is first installed, an Extension Group called **All groups** appears in the Extension Groups list. This contains all the extensions and trunks that have been set up in the SIM to be monitored by ucCompanion.

You can create additional Extension Groups that contain a subset of monitored extensions. There are two type of extension groups, both of which are created using the BLF Administrator:

- Tenant extension groups. Extensions in a tenant group can only see extensions that are in their same tenant group.
- Global system-wide groups. These are for extensions that are visible to all users of the ucCompanion system. These groups are non-tenanting groups and are explained in the section [Creating Global Extension Groups and Adding Extension Cells on page 31](#).

This section describes how to set up tenanting extension groups. There are two types of tenant extension groups: parent (called Tenant Parent) and tenant child (called Normal). All extensions within a Tenant Parent group can see all other extensions inside that same Tenant Parent group, regardless of which Normal (tenant child) group the extensions are in.

To create Tenant Parent groups, the system-wide admin password is required. To create Normal (tenant child) groups, the tenanting password may be used. Both these passwords are set up when the system is first installed, and may be modified thereafter.

The Tenant Administrator must be logged in within the tenant group they wish to change. If logged in with the tenant admin password, the Tenant Admin can create Normal groups within their tenant group and administers their tenant groups. The Tenant Admin also sees any system-wide groups. But their tenant parent or child group that they belong to must be created first by the system-wide BLF Administrator. If system-wide groups already exist, the tenant admin can delete and add extensions to them. If the Tenant Admin accidentally deletes an extension from their tenant group, only the system-wide BLF Admin can add it back.

To create a Tenant Extension Group

1. In ucCompanion - Live Attendant or ucCompanion, log in by selecting **File > Admin Login**.

If you will be creating Tenant Parent groups and Normal (tenant child) groups, enter the system-wide admin password.

If you will be creating Normal (tenant child) groups only, you may log in using the just the tenanting password.



You may use the tenant admin password if the Tenant parent groups have already been created by the system-wide admin password and your extension is a member. This allows a tenant admin to create normal child groups within their tenant only and allows administration of their tenant groups. The tenant admin cannot create system-wide or tenant parent groups.

2. In ucCompanion or ucCompanion - Live Attendant, select **Settings > Administration > Busy Lamp Field**.



For an extension or trunk to be visible in the BLF Administrator, it must already have been added in the SIM component.

3. The BLF Administrator opens. Right-click in the Extension Group Panel and select **New Group**. The **Group Properties** dialog box appears.

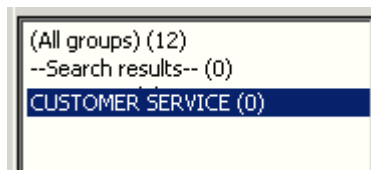
4. In the **Group Type** box, select either **Normal** or **Tenant Parent**. Normal groups must be children (contained within) a Tenant Parent group.

If using the tenant admin password, you will see only your tenant and system-wide groups, along with any extensions not belonging to any group. You are not be allowed to create Tenant Parent or system-wide groups.



All extensions within a Tenant Parent group can see all other extensions inside that same Tenant Parent group, regardless of which Normal (tenant child) group the extensions are in.

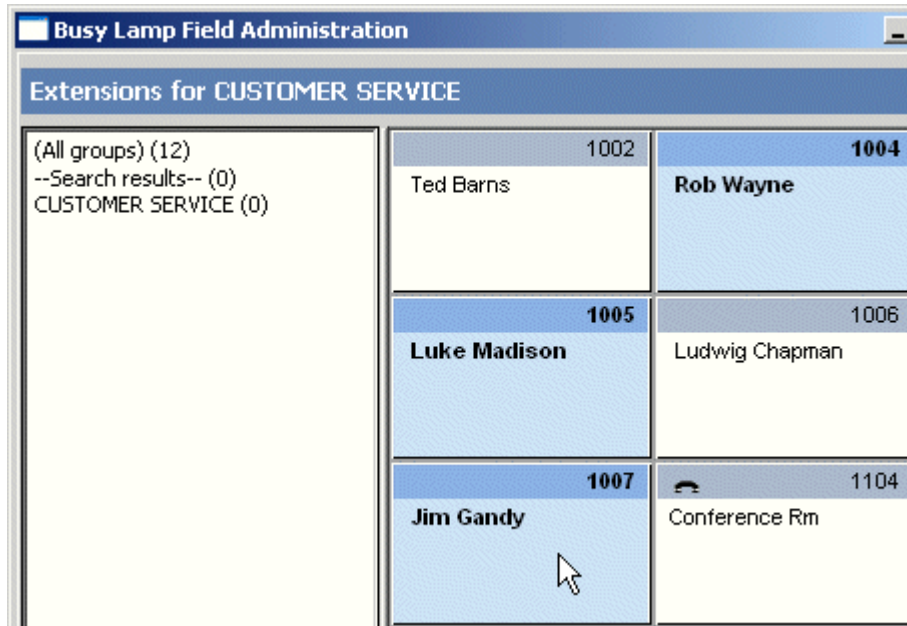
5. If you selected **Normal** as the **Group Type**, now you must also choose an already-existing Tenant Parent group, from the Parent Group Name box.
6. In the **Group Name** box, type a unique name for the group, and click **OK**.
7. The new tenant Extension Group is added to the list of Extension Groups in the left pane.



*After creating a Tenant Parent group or Normal group, you **MUST** add at least one extension to the new group before clicking **OK** in BLF Administrator, otherwise the new group will not be created.*

8. At this point, the new Tenant Extension Group is empty. You now need to add Extension Cells to it. You must add at least one extension, or the new group is not saved. The Extension Cells you add to the tenant group are only able to see Extension Cells that are also in their same tenant group.

Select the **All groups** group in the left pane, and select all the extensions that you want to include in your new group. To select multiple items, **Shift + click** to select a block of cells, or **Ctrl + click** to select individual cells.



9. After you have selected all the cells, drag and drop the cells you selected onto the new tenant Extension Group. This adds the cells to the group.



10. Select **OK** to save your changes and exit the BLF Administrator.

Creating New Extension Cells

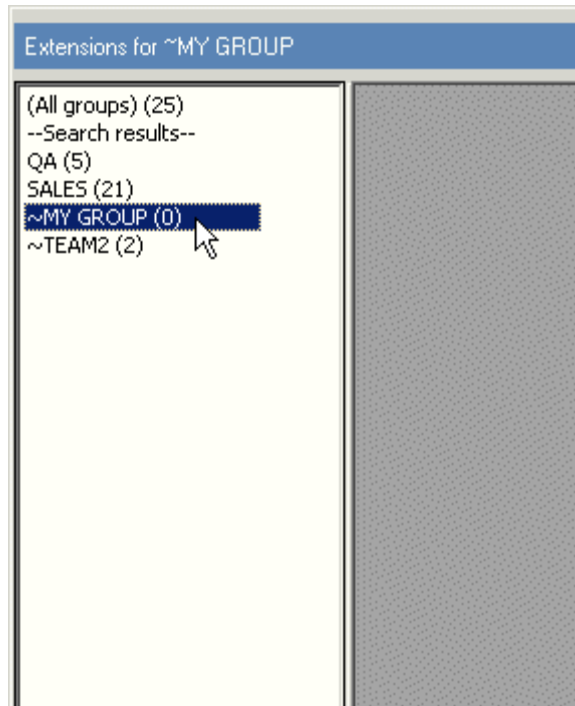
In addition to the cells that are created when devices are loaded from the PBX, you can add new cells and assign dialable numbers to them. These extensions cells provide access to frequently called numbers, both internal and external. These cells thus function as global speed dial buttons.



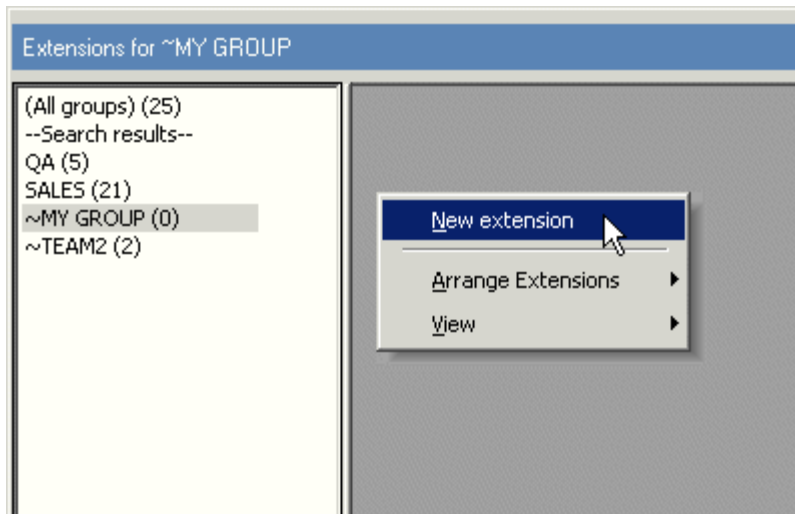
If you create an extension cell while in a tenant group (either a Normal or Parent group), the extension is only visible to users in that Parent tenant group.

To create a new Extension Cell

1. Select the Extension Group where you want to add a new cell. For information about creating a new Extension Group, refer to *Creating Global Extension Groups and Adding Extension Cells on page 31*.



2. Right-click on the blank (gray) area in the right pane, and select **New Extension**.



3. The *Edit Extension* dialog box appears.

Fill in the Edit Extension dialog box as follows:

ID Number	This is a read-only field, which shows the unique ID for this cell.
First Name	Enter the first name, as you want it to be displayed in the Extension Cell.
Last Name	Enter the last name, as you want it to be displayed in the Extension Cell.
Department (or a comment)	(Optional) Enter a department name, company name, or other information you want to display in this cell. This is displayed in the cell below the first and last name. A maximum of 12 characters is allowed.
Dialable Address	Enter a valid telephone or extension number. Enter digits only (no characters, spaces, hyphens, or parentheses). For outside numbers include the digits required to dial out, such as "9" and "1" and an area code; for example "916175551212." Note: Your system may use a number other than 9. When users click this Extension Cell once, this number is placed in the client's Call Box, and users can then click Make Call to call the number. When users double-click this Extension Cell in the client, this number is dialed automatically.

4. Select **OK** in the **Add Extension** dialog box. The new Extension Cell will now be added to the Extension Group.
5. Select **OK** in the message boxes that appear. The database will be updated with the changes to the extension.

Within the BLF Administrator, an asterisk (*) will be added in all fields in this cell. The asterisks indicate that these are new (or modified) fields in the system, rather than information that originally came from the PBX. The asterisks appear in the Extension Cell in the Busy Lamp Field Administration window, and also appear in the **Edit Extension** dialog box within the BLF Administrator. The asterisks are visible in users' client interfaces.

Editing Extension Cell Settings

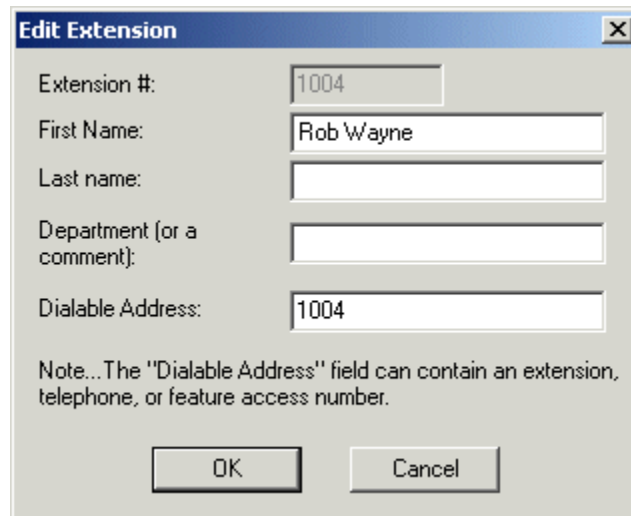
You can edit settings for extensions or trunks using the BLF Administrator. These changes are remembered by ucCompanion, even if they differ from what is set in the PBX.



You can also edit devices in the PBX/phone system, and then the changes are read by the SIM.

To modify the contents of an Extension Cell

1. Select the Extension Group that contains the device (extension or trunk) you wish to modify.
2. Right-click on the Extension Cell for the device you want to modify, and select **Edit Extension**.
3. The **Edit Extension** dialog box appears.

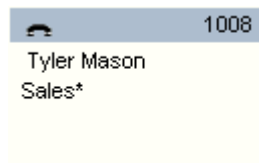


The image shows a dialog box titled "Edit Extension". It contains several text input fields: "Extension #:" with the value "1004", "First Name:" with "Rob Wayne", "Last name:" (empty), "Department (or a comment):" (empty), and "Dialable Address:" with "1004". Below the fields is a note: "Note...The 'Dialable Address' field can contain an extension, telephone, or feature access number." At the bottom are "OK" and "Cancel" buttons.

Fill in the fields in this dialog box as desired. The **Dialable Address** field is the number to be dialed in order to access the extension, feature, or telephone number that this cell belongs to.

4. Select **OK** in the message boxes that appear. The database is updated with the changes to the extension.

Within the BLF Administrator, an asterisk (*) is added in fields that have been modified. The asterisk appears in the Extension Cell in the Busy Lamp Field Administration window, and also appears in the **Edit Extension** dialog box within the BLF Administrator. The asterisks are not visible in users' client interfaces.



Example: An asterisk shows the Department field has been modified

Setting Tenant Extension Access Rights

If you are using tenant groups, you can set the access rights for each extension, to change which tenant groups in the system the extension can see. For more about tenanting, refer to [Creating Tenant Extension Groups and Adding Extension Cells on page 33](#).

The default access rights for an extension is that the extension can see all extensions within the extension's Tenant Parent group. If an extension is not part of any tenant group, the extension can see all other extensions in the system.

To change the access rights for an extension

1. In the left pane of the BLF Administrator, click the Extension Group that contains the extension you wish to modify.
2. Right-click on the Extension Cell for the extension you want to modify, and select **Set Access Rights**. The **Set Access Rights** dialog box appears.

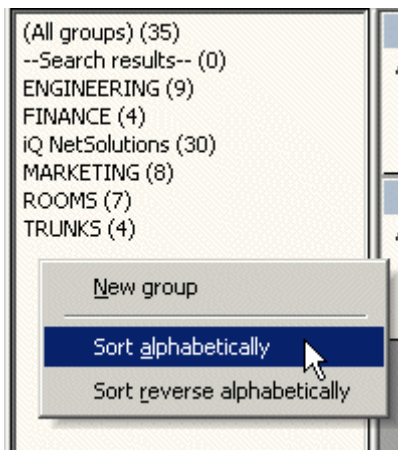
Change the settings in this dialog box as desired:

Group	<p>All extension groups that are monitored by ucCompanion are listed in this column, whether they are Regular System-Wide (global), Tenant Parent, or Normal (tenant child) groups.</p> <p>Regular System-Wide groups are shown in gray text. Your tenant group, parent and normal groups are also grayed. They are also enabled, meaning you have access rights to view the groups and extensions within these groups. If you are logged in with system-wide BLF admin account, other parent groups are visible and not grayed. If you are logged in with tenant admin, no other parent groups but your own are visible here.</p>
Parent ID	<p>This column displays only those parent groups that contain child groups. The Tenant Parent group is displayed in the Parent ID column, and the child ("Normal") group appears in the Group column.</p> <p>If the Parent ID column is empty for a group, that group is either a Tenant Parent group, or it is a Regular System-Wide group.</p>
Visible	<p>This column sets the individual groups this extension has access to. A check mark next to a group means this extension is allowed to view all extensions inside that group.</p> <p>To quickly set an extension to see all extension groups in the system, check the Visible check box in the column heading. To set access back to the default, uncheck the Visible check box.</p>

Sorting Extension Groups

To sort Extension Groups

- Right-click in the Extension Groups list, and choose **Sort alphabetically** or **Sort reverse alphabetically**.

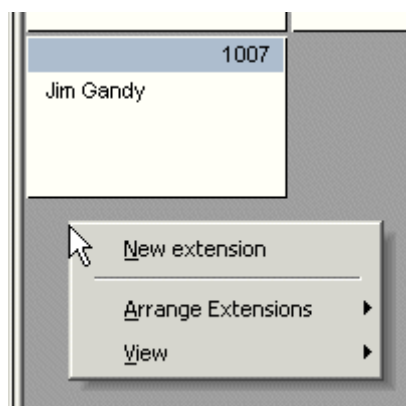


The groups are sorted accordingly.

Changing How Extension Cells are Displayed

To change how Extension Cells are displayed in the BLF Admin window

1. Right-click in the Extension Cell area, in the gray area (not on a cell).



2. Select **Arrange Extensions** or **View** from the menu.

The choices in this menu are the same as when you are working in the Extension Panel in the ucCompanion - Live Attendant. Refer to the *Netvanta ucCompanion Users Guide* for detailed information.

Deleting Extension Groups

To delete a system-wide Extension Group

1. In the BLF Administrator, right-click on the Extension Group you want to delete, and select "Delete Group."
2. A confirmation dialog appears. Select **Yes** to delete the group.



Deleting a group does not delete the Extension Cells that were in that group. Refer to [Deleting Extension Cells on page 42](#).

Deleting Extension Cells

To delete Extension Cells

1. Decide whether you want to delete the cell from only one Extension Group or from all Extension Groups.

To delete a cell from only one group: Select the group to open it, and then choose the cell you want to delete in that group.

To delete the cell from all groups: Select **All groups**, and then select the cell.



All Groups



*To select multiple cells, use **Shift + click** to select a block of cells, or **Ctrl + click** to pick individual cells.*

2. Right-click on the selected cell(s). Select **Delete Extension** from the menu. The cells have now been deleted from all Extension Groups.

Resetting the Password for an Extension

Users of ucCompanion and ucCompanion - Live Attendant can set personal passwords (by selecting **Settings > Options > My Extension** tab). This password prevents another user from connecting using the same name or extension number.

To reset the personal password for an extension

1. In the BLF Administrator, right-click on the extension you want to reset, and select **Reset Extension Password**.

The **User Password** dialog box appears.

2. Enter a new password, and then re-enter it. This serves as a temporary password. Communicate this password to the user, so they can log in and change it to a password they choose.

Glossary

BLF

Busy Lamp Field; Extension Cell.

BLF Administrator

The Busy Lamp Field Administration window. Refer to [Overview of Administering Extensions on page 29](#).

Call List

The area in ucCompanion client software where call activity is displayed.

Client

End-user software that, using client/server network architecture, connects to a main central computer (a server).

Device

Extension or trunk that is set up in the PBX or phone system, and can be monitored by ucCompanion.

Extension Cells

In ucCompanion client software, each extension or trunk can have a cell in the Extension Status area. This is the Extension Cell, or BLF. Extension Cells show their status, such as idle, connected, holding, calling, available for instant messages, etc.

Extension Groups

In ucCompanion client software, groups of extensions that are in the same department or other category. System-wide Extension Groups are set up by the administrator, and client users can also add their own local Extension Groups.

Extension Status Area

In ucCompanion client software, the part of the main window where Extension Cells are displayed.

Handset

The physical, desktop telephone unit through which users dial and speak.

IM

Instant Message

IP Address

The unique address for a device on a network, using the Internet Protocol standard.

LAN

Local Area Network.

MWI

Message Wait Indicator. This indicates you have voicemail messages.

NIC

Network Interface Card.

PCE

Presence and Control Engine. The central component of the ucCompanion Software Suite. Provides a real-time database and distribution of presence, telecommunications status, events, and commands.

Server Component

The Server component of ucCompanion includes the PCE engine, the database, and the licensing server.

SIM

Systems Interface Module. A component of ucCompanion software that interfaces to a particular PBX. The layer of software between the PCE and the PBX.

UC

ucCompanion, the software suite from ADTRAN.

ucCompanion Presence and Control Engine

Refer to PCE.

ucCompanion Server

The central component of ucCompanion that includes the PCE, licensing, system database, and central logs.