

Gigaset proCTI

# Server Installation

Version 2.5

## **Technical Presentation – Server Installation & Configuration**

This is a technical presentation looking at the installation and configuration of the Gigaset Pro CTI server.

This presentation is aimed at re-seller technical personnel who will be carrying out installations and configurations on behalf of customers, and will also be of interest to anyone else wishing to have a greater technical understanding of the installation and configuration of the Gigaset Pro CTI server software.

### Other Presentations

- The “Clients” technical presentation follows on from this presentation.
- The “Sales” presentation provides detailed information about all Gigaset Pro CTI features. \*

*\* The technical “Server” and “Clients” presentations describe how to install and configure the Gigaset Pro CTI server and clients, but do not describe the actual functionality. The “Sales” presentation is, therefore, recommended to anyone wishing to gain an fuller understanding of the Gigaset Pro CTI product.*

Gigaset proCTI

Client Installation  
Version 2.5

Gigaset proCTI

Sales Presentation  
Version 2.5

### Other Presentations

A separate presentation is available covering the installation and configuration of the client components of Gigaset Pro CTI.

There is also another separate sales presentation which provides detailed information on all Gigaset Pro CTI features.

The technical “Server” and “Clients” presentations describe how to install and configure Gigaset Pro CTI, but do not describe the actual functionality. The “Sales” presentation is, therefore, recommended to anyone wishing to gain a fuller understanding of the Gigaset Pro CTI product.

## Installation

### **INSTALLATION**

We begin this technical presentation with the installation of the Gigaset Pro CTI server.



## Server Specifications

### Sizing Definitions

	“Small Single Site”	“Medium Multi-Site”	“Large Multi-Site”
Number of Sites	1	6	6
Trunks	30	150	300
Calls/hr	500	2000	4000
Ext/Users	50	400	1000

#### Notes:

- Please consult with us for sites larger than those specified.

The minimum specification for the Gigaset Pro CTI server is dependent on the size and number of phone systems that will be connected to it.

To assist with providing guideline specifications, here are three examples that we will use in the forthcoming slides.

- A “Small Single Site” is where there is only one phone system (site) connected to the Gigaset Pro CTI server. The phone system has up to 30 trunks, handling up to 500 calls per hour with up to 50 users and extensions.
- A “Medium Multi-Site” is where there are up to 6 separate phone systems connected to the Gigaset Pro CTI server. The phone systems have a combined 150 trunks, handling up to 2000 calls per hour with up to 400 users and extensions.
- A “Large Multi-Site” is where there are up to 6 separate phone systems connected to the Gigaset Pro CTI server. The phone systems have a combined 300 trunks, handling up to 4000 calls per hour with up to 1000 users and extensions.

Please contact us if you have a potential Gigaset Pro CTI installation that falls outside of these example definitions.



## Server Specifications

### Supported Operating Systems

	Small Single Site	Medium Multi-Site	Large Multi-Site
Windows Server 2008 R2	Yes	Yes	Yes
Windows Server 2012	Yes	Yes	Yes
Windows Server 2012 R2	Yes	Yes	Yes
Windows 10	Yes	Yes	Yes
Windows 8.1	Yes	Yes	Yes
Windows 7 (SP1)	Yes	Yes	No
	32 bit and 64 bit	32 bit and 64 bit	64 bit only

**Notes:**

- Virtual environments are supported (e.g. Vmware, Hyper-V)
- A "small single site" server installation may co-exist with other applications on a shared server. However, if Integrated Telephony experiences any performance issues, a dedicated server should be used.

This slide shows the server operating systems that are supported by our three example Gigaset Pro CTI installations.

Note that Windows 7 (SP1) is not supported for the large multi-site installations.

Virtual environments (e.g. Vmware, Hyper-V) are supported, and if it's a "small single site" server installation, this can generally co-exist on a shared server. However, if performance issues are experienced with the Integrated Telephony, a dedicated server should be used to host the Gigaset Pro CTI server.



## Server Specifications

### Server Hardware Requirements

	Small Single Site	Medium Multi-Site	Large Multi-Site
GB of Memory	2	3	4
GB of free hard drive	20	20	20

**Notes:**

- Network adapter connection to TCP/IP network (not wireless) required.
- Processor requirement should be as advised by Microsoft for the chosen server Operating System

This slide shows the minimum hardware requirements for the various types of Gigaset Pro CTI installation.

The Gigaset Pro CTI server must be connected to the TCP/IP network via an adapter (not wireless).

The processor requirement for the server should be determined by the Microsoft recommendation for the Operating System that is installed on the server.



## Server Specifications

### MS SQL – Minimum Requirements

Small Single Site	Medium Multi-Site	Large Multi-Site
<p>SQL Server Express 2008 R2 <i>(Recommended &amp; shipped with software)</i></p> <p><i>SQL Server 2008 R2 also supported</i></p>	<p>SQL Server Express 2008 R2 <i>(Recommended &amp; shipped with software)</i></p> <p><i>SQL Server 2008 R2 also supported</i></p>	<p>SQL Server 2008 R2 or SQL Server Express 2008 R2* <i>(Recommended &amp; shipped with software)</i></p> <p><i>* If SQL Express is used, please note that call history would need to be restricted to 14 days</i></p>

The Gigaset Pro CTI server utilises an SQL database for storing various elements of data, including Call History and the Shared Address Book.

If SQL is not already installed on the server, SQL Server 2008 R2 Express will be installed as part of the Gigaset Pro CTI server installation process. If SQL is already installed, it will not be re-installed. Instead, a separate instance will be created for Gigaset Pro CTI.

SQL Server 2008 R2 can be optionally used instead of SQL Server Express.

On Large Multi-Site installations, please note that if SQL Server Express is used, the call history would need to be restricted to 14 days to limit the potentially large volumes of call history data.

## Product Information

### Product Information

Go to <http://gigasetpro.com/>, Gigaset Pro CTI is available as a fully functioning trial version for 30 days.

### Supported Languages

Arabic, Catalan, Chinese, Danish, Dutch, English, Finnish, French, German, Greek, Hungarian, Italian, Japanese, Korean, Lithuanian, Polish, Portuguese, Romanian, Russian, Spanish, Swedish, Welsh

## Compatibility and Product information

Go to the gigasetpro website for the latest version of the Gigaset Pro CTI Server (and Client) software.

**Important: Before embarking on any Gigaset Pro CTI installation, you should always check the website to ensure that you have the very latest version.**

### Before you begin

- Latest version of the Gigaset Pro CTI Server software setup program
- IP Address of the telephone system.
- License Serial Numbers
- If upgrading from a previous release, Software assurance licensing is also required.



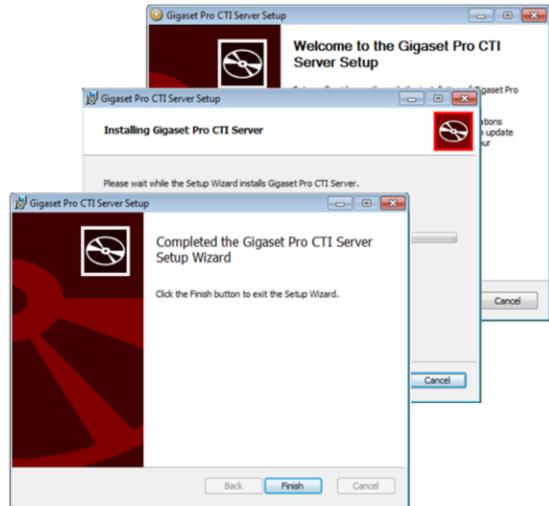
### Before you begin

Once you're ready to begin the Gigaset Pro CTI server installation, and you have confirmed that the computer on which you intend to install the server meets the minimum hardware and software requirements, you then need to check that you have the following available to you –

- The very latest version of the Gigaset Pro CTI server installation program.
- The IP address of the telephone system to which the server will be connecting
- The license serial numbers for the Gigaset Pro CTI server and the various client features that have been specified for this installation.
- If this installation is an upgrade of a previously installed version of Gigaset Pro CTI, you will also need the appropriate Software Assurance licensing in place in order for the upgrade to take place.

## Installation Program

- Double-click to start
- The installer will launch automatically.
- As part of the installation process, the Gigaset Pro CTI Server service will be installed and started.
- Note the installer contains Microsoft SQL Server 2008 Express components which will be installed if they are not already present.



## The Install Program

To begin the installation process, simply locate and double-click on the Gigaset Pro CTI Server installation program. The installer package will launch automatically and the installation will commence.

Follow the on-screen instructions to complete the installation.

As part of the installation process, the Gigaset Pro CTI Server service will be installed and started.

*Note: The Gigaset Pro CTI server utilises an SQL database for storing various elements of data, including Call History and the Shared Address Book. If not already installed on this computer, SQL Server 2008 R2 Express will be installed as part of the Gigaset Pro CTI server installation process. If SQL is already installed, it will not be re-installed. Instead, a separate instance will be created for Gigaset Pro CTI.*

### Installation Notes

- The Gigaset Pro CTI clients and server communicate using TCP port 21050.
- UDP port 21059 is used to allow the “detect” button in the configuration to automatically locate the Gigaset Pro CTI server.
- The server installation should configure the local firewall to allow support for these services. In the event that a non-standard firewall is used then these ports may need to be “allowed” manually.
- After the installation is complete, the configuration “Installation Wizard” will automatically start....

### Installation Notes

The Gigaset Pro CTI clients and server communicate using TCP port 21050.

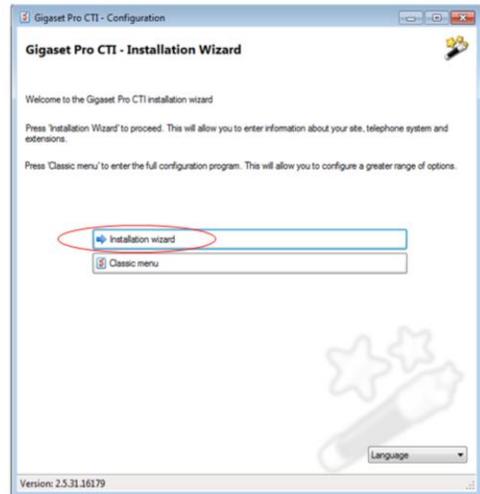
UDP port 21059 is used to allow the “detect” button in the configuration to automatically locate the Gigaset Pro CTI server.

The server installation should configure the local firewall to allow support for these services. In the event that a non-standard firewall is used then these ports may need to be “allowed” manually.

After the installation is complete, the configuration program will automatically run for the first time via the “installation wizard”.

## Installation Wizard

- Use the wizard when running the configuration for the first time.
- Choose the “Installation Wizard” option.



## The Installation Wizard

When the installation wizard automatically starts up at the end of the installation, you are presented with a choice of either starting the wizard, or going straight into the classic (“full”) configuration.

Unless you are experienced in installing Gigaset Pro CTI, it is recommended that you always choose the “installation wizard” option in the first instance after installation.

## Licensing

- Enter licensing and registration information.
- Enter the customers details (not yours).
- Mandatory fields must be completed. If any are not completed a warning will appear and the applicable fields will be marked in red
- Click on “Licensing Assistance” to go to online help for instructions.

## Licensing

The first section that you will be taken to by the wizard is the Licensing section.

In this screen you will provide the licensing and registration information for this instance of Gigaset Pro CTI.

If you are installing the software on behalf of a customer, please ensure that you enter the customer’s name, address and telephone details and not your own. This information should be as valid and accurate as possible to assist technical support with identifying the customer in the event of licensing issues.

Mandatory fields must be completed. If any are not completed, a warning will appear, and the applicable fields will be marked in red.

## License Registration

- Click 'Register online'.
- You will be prompted to confirm that the registration details are correct.
- Once registration is successful you will see a list of registered items appear at the foot of the page.



**Licensing** 🔒

**Registration**

Customer: ABC Customer

Country: United Kingdom

Address 1: ABC address

Address 2: ABC address

Town: ABC address

Province/State: Postal code:

Contact: ABC Contact

Telephone: 12345678 Email: ABC@ABC.com

Maintainer: ABC Maintainer

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**License**

Serial number: CKWACC9H ✔ [Licensing assistance](#)

[Refresh licenses](#) [Manual registration](#) [Release license](#)

Name	Total	Used	Expires	Valid
Connect	3	0		✔

## License Registration

Three options are provided for the registration process, and it is generally recommended that you use the “register online” option.

Once you have entered the registration information, click “register online” and confirm the registration details, this will connect to the Gigaset Pro CTI licensing server and pull down the licensing information.

Once registration is successful you will see a list of registered items appear at the bottom of the Licensing page.

### Manual Registration

- For use when the Gigaset Pro CTI server PC has limited internet access.
- On a different PC, which *does* have internet access –

**<http://cti.gigasetpro.com/register>**

- Enter all the registration details, including serial number and site ID, then click “Register”.
- This provides one or more “unlock” codes.
- Enter the unlock code(s) on the Gigaset Pro CTI server.

A screenshot of a "Registration" dialog box. It contains the following text and fields:

For instructions on how to register please visit:  
[cti.gigasetpro.com/register](http://cti.gigasetpro.com/register)

Site ID:

Serial number:

Unlock code:

Buttons: OK, Close

### Manual Registration

If the PC onto which you are installing the Gigaset Pro CTI server has limited internet connectivity (or perhaps is behind a firewall preventing full access to the internet), then you can use the “manual” registration method.

In this scenario, go to a PC that does have internet access and navigate to the following web page –

**<http://cti.gigasetpro.com/register>**

Enter all the registration details, including serial number and site ID, then click “Register”. This provides one or more “unlock” codes, which you then enter on the Gigaset Pro CTI server..

Once the unlock code has been supplied, this will complete the licensing process, and the licences will appear at the bottom of the page.

### 30-day Trial

- Free, fully-functional 30-day trial.
- Can use a demonstration telephone system, or connect to a real one.
  - Leave serial number blank
  - Fill-in remaining info
  - Click “register for trial” on licensing screen



### 30-day trial

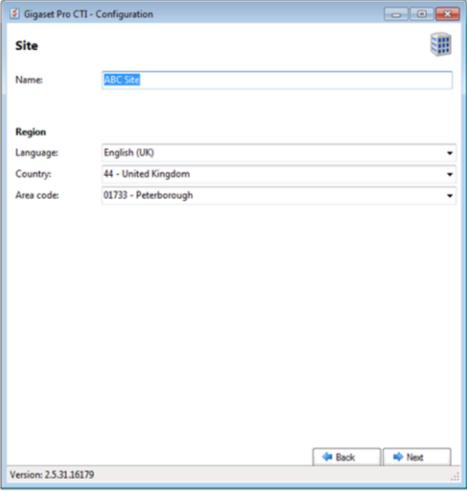
The Gigaset Pro CTI software is available at any time as a 30-day free trial. Unlike many trials, which limit certain functionality, the Gigaset Pro CTI trial is fully-functional and also includes a couple of Mobile licenses.

The trial does not require the software to be connected to a real telephone system (it can operate using a “demonstration” phone system, as we’ll see later), but it can be connected to a real phone system if one is available.

Having downloaded the trial and executed the installation, complete the customer details section in the normal way, leave the serial number blank, click “register for trial” and this will initiate the 30-day trial.

### Site

- Information about the site/location where the telephone system and Gigaset Pro CTI server are installed.
- Give the site a meaningful name.
- Select language and country
- Area code is required so we know where we are dialling from.



The screenshot shows a configuration window titled "Gigaset Pro CTI - Configuration". The "Site" section contains the following fields:

Site	
Name:	ABC CTI
Region	
Language:	English (UK)
Country:	44 - United Kingdom
Area code:	01733 - Peterborough

At the bottom of the window, there are "Back" and "Next" buttons, and a version number "Version: 2.5.31.16179".

### Site

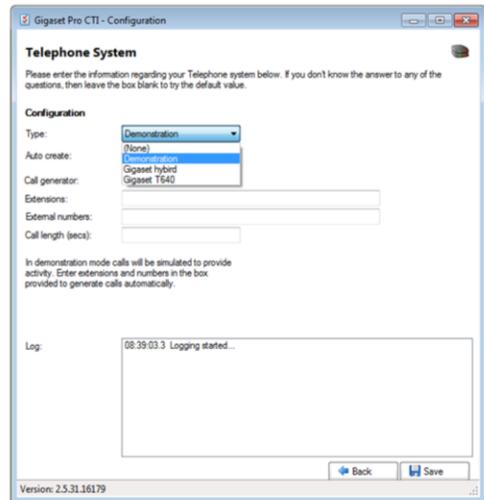
Having completed the registration, the wizard will then take you through a couple of other configuration pages.

The Site page is where you provide information about the site or business where the Gigaset Pro CTI server is being installed.

Enter a meaningful name for this site, and then select the appropriate country and area code from the drop-down lists. The area code is required so that Gigaset Pro CTI knows where the users on this system are dialling from.

## Telephone System (Select)

- Select the appropriate telephone system from the Type drop-down...



## Telephone System (Select)

The Telephone System page is where you specify the telephone system to which you will be connecting the Gigaset Pro CTI server....

## Telephone System (Configure)

- The required configuration fields will vary depending on the telephone system selected.
- Some systems may only require you to enter the IP Address of the telephone system.
- Other system-specific information might be required (e.g. admin user names and passwords).
- “Auto create” downloads extension details from the phone system. “Force Now” synchronises changes without a restart.
- Click SAVE to download a list of Extensions...

The screenshot shows the 'Gigaset Pro CTI - Configuration' window. The main section is titled 'Telephone System' and contains the following fields and options:

- Type:** A dropdown menu set to 'Gigaset TS40'.
- IP address:** An empty text input field.
- Password:** An empty text input field.
- Auto create:** A checked checkbox next to the text 'Auto create'.
- Force now:** A button next to the 'Auto create' checkbox.
- Trunk access:** An empty text input field.
- Force now:** A button next to the 'Trunk access' field.
- Log:** A text area containing the message '08:39:03.3 Logging started...'.

At the bottom of the window, there are 'Back' and 'Save' buttons, and the version number 'Version: 2.5.31.16179' is displayed in the bottom left corner.

## Telephone

Once you have selected the telephone system from the list, the Telephone System page will then display the fields that are appropriate for that telephone system.

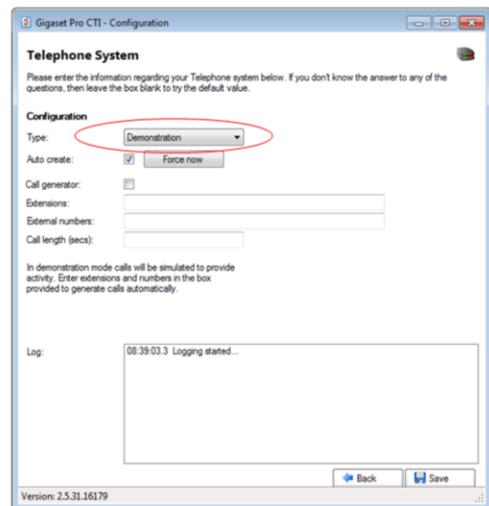
Some systems may only require you to enter the IP address of the phone system. Other systems may require additional system-specific information such as a user name and password for admin access.

Ticking the 'Auto create' option allows Gigaset Pro CTI to download the extensions details from the telephone system. If, later on, you make any changes to extensions, you can synchronize those changes with 'Force Now' without requiring a restart.

You are also required to enter the 'Trunk access' code, which in the UK is normally a "9".

## Demonstration phone system

- Use instead of a real phone system if one is not available.
- **Auto create** creates some fake extensions and users.
- **Call generator** allows you to generate fake incoming and outgoing calls, the length of which you can control with the “call length” option.



## Demonstration Telephone System

As an alternative to attaching to a real phone system, and especially if you are just trialling the product, you can select Demonstration as the type.

The demonstration phone system has been configured to contain some extensions and users, and can be used at any time to play with Gigaset Pro CTI and test the functionality without actually connecting to a real phone system.

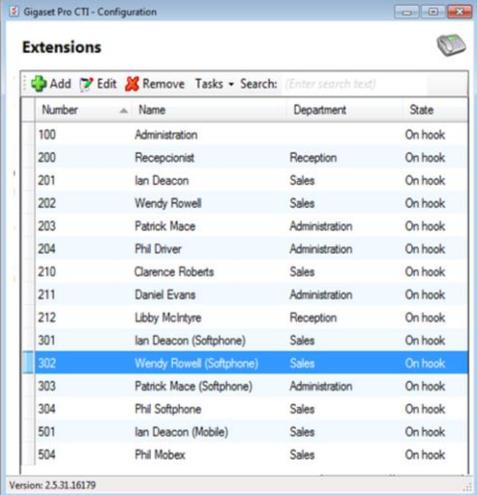
The “auto create” option will automatically create some fake extensions and users.

The “call generator” option automatically generates incoming and outgoing calls – this is useful so that you have some activity on the system when looking at some of the monitoring and reporting features.

Once you’ve selected the demonstration phone system, the logging section at the foot of the page will show that the Gigaset Pro CTI Server has successfully connected to the demonstration phone system, and you’ll also see the various extensions being monitored.

## Extensions

- If extensions do not appear, click back button and review settings (or check log for messages).
- State should show as “on hook” or “off hook”.
- From here you can add, edit, remove extensions.
- You can also reset any extensions that have incorrect information by using the ‘Reset’ option in the Tasks menu.



The screenshot shows the 'Gigaset Pro CTI - Configuration' window with the 'Extensions' tab selected. The window contains a table with columns for Number, Name, Department, and State. The table lists various extensions, including those for Administration, Reception, Sales, and Softphone. The extension with number 302, 'Wendy Rowell (Softphone)', is highlighted in blue. The status for all listed extensions is 'On hook'.

Number	Name	Department	State
100	Administration		On hook
200	Receptionist	Reception	On hook
201	Ian Deacon	Sales	On hook
202	Wendy Rowell	Sales	On hook
203	Patrick Mace	Administration	On hook
204	Phil Driver	Administration	On hook
210	Clarence Roberts	Sales	On hook
211	Daniel Evans	Administration	On hook
212	Libby McIntyre	Reception	On hook
301	Ian Deacon (Softphone)	Sales	On hook
302	Wendy Rowell (Softphone)	Sales	On hook
303	Patrick Mace (Softphone)	Administration	On hook
304	Phil Softphone	Sales	On hook
501	Ian Deacon (Mobile)	Sales	On hook
504	Phil Mobex	Sales	On hook

## Extensions

Regardless of whether you select a real system or the demonstration system, when you click “Save” at the foot of the Telephone System page (and then “Next”), Gigaset Pro CTI will attempt to connect to the telephone system and download a list of extensions. Depending on the number of extensions, this process can take several seconds.

The installation wizard will then automatically take you to the Extensions page. If, after about 30 seconds, the extension list hasn’t started downloading, press the ‘Back’ button to review the telephone system settings.

The “State” of each extension should be either “on hook” or “off hook”.

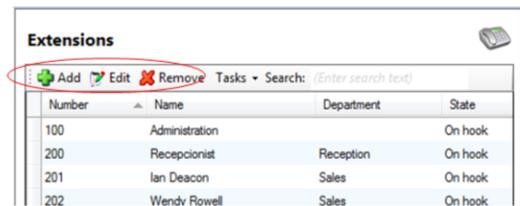
- If an extension says “offline” or “unknown” this indicates a problem (handset not fully configured).
- If the column is blank, click BACK button, check details (and log) and try again.

Contact tech support if you’re having problems and cannot resolve them.

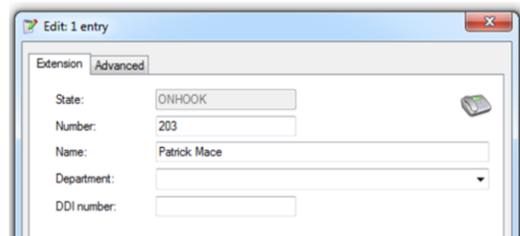
## Extensions (Edit)

- To edit (or add) an extension, use the 'Edit' and 'Add' buttons.
- Changes are reflected only in Gigaset Pro CTI (the phone system itself isn't updated).
- **Name** is the name displayed against this extension through Gigaset Pro CTI.
- **DDI Number** assist the Telephony service when calculating the destination of direct inbound calls.

*Enter any value as presented by the network provider (normally the last 4-6 digits) if DDI calls do not appear to be correctly associated with the relevant extension.*



Number	Name	Department	State
100	Administration		On hook
200	Receptionist	Reception	On hook
201	Ian Deacon	Sales	On hook
202	Wendy Rowell	Sales	On hook



Extension Advanced

State:

Number:

Name:

Department:

DDI number:

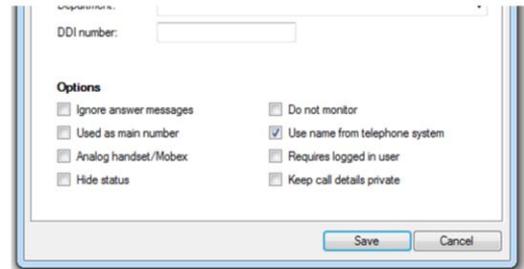
## Equipment (Extensions) – Edit

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

The DDI number is used by the Telephony service when calculating the destination of direct inbound calls. Enter any value as presented by the network provider (normally the last 4-6 digits) if DDI calls do not appear to be correctly associated with the relevant extension.

## Extensions (Edit Options)

- Additional options can be enabled or disabled for this extension.
- For example –
  - **Hide Status** prevents this extension from appearing on the Presence Screen
  - **Requires Logged In User** forces the user to login to the client software before calls can be made



## Equipment (Extensions) – Edit

At the bottom of the edit/add page there are various options that can be enabled or disabled for this extension.

- **Ignore answer messages** – this should be set for voice processing equipment, such as voice mail, if you do not want to consider a call as ‘answered’ even though the call is answered at this device.
- **Do not monitor** – ignore telephony activity at this extension (might be a fax or an unused extension.)
- **Used as main number** – calls to this extension are treated as operator calls.
- **Use name from telephone system** – keeps the name here in synch with what’s configured actually on the phone system
- **Analog handset/Mobex** – set this if the device is an analogue handset (i.e. a fax machine, modem or non digital or IP handset) or if it is a virtual mobex device.
- **Requires logged in user** – Calls are prohibited from this extension unless a user using this extension is logged in to the client software.
- **Hide status** – Do not show this extension on the ‘Presence’ window.
- **Keep call details private** – details of an active call on this extension will not display in presence.



Initial Configuration

### **Initial Configuration - Completed**

When you have finished reviewing the extensions ,press the ‘Close’ button on the Extensions page and the installation wizard will end.

You have now completed the initial/base configuration of the Gigaset Pro CTI server.

As you can see, the wizard installation is very straight-forward and usually takes only 5 to 10 minutes to complete.

## Additional Configuration

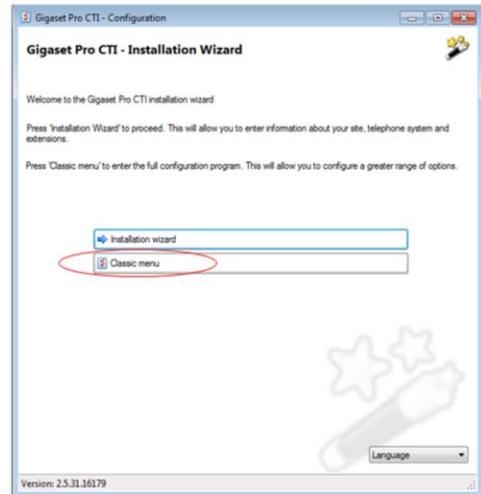
### **Additional Configuration**

You already have a basic system configured and operational but we are going to look now at all of the other configuration options, which may or may not be relevant to this installation of Gigaset Pro CTI.

We are going to go work through all the remaining configuration pages, one-by-one, to show you what they contain, and advise you on why and when you may need to access these pages for a particular Gigaset Pro CTI installation.

## Gigaset Pro CTI Configuration

- Locate and start the configuration program.
- Choose the “classic menu” option.
- The full configuration window will be displayed...

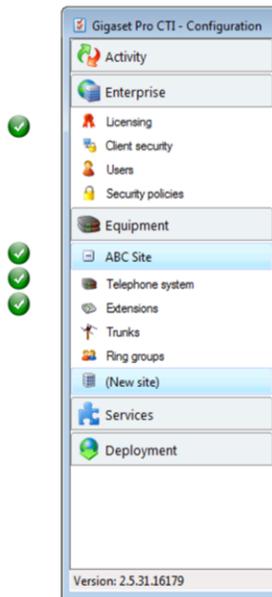


### The Server Configuration program

In order to start this process, you first need to locate and start the Gigaset Pro CTI server Configuration program, which will have been installed during the installation process.

You will be presented once again with the Installation Wizard menu, but this time you will select the “classic menu” option. You would generally use the classic menu for all of the post-installation ad-hoc configuration of the Gigaset Pro CTI server.

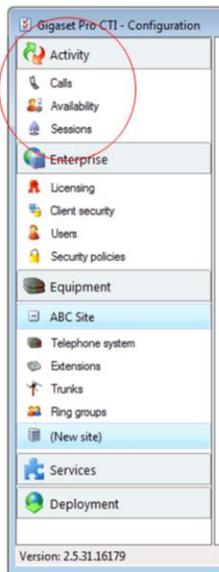
This will take you to the main configuration menu, from where you can access all of the configuration pages...



Already done by  
the Installation Wizard...

## Installation Wizard – Completed

As you can see, we have already visited some of the configuration pages during the initial Installation Wizard.



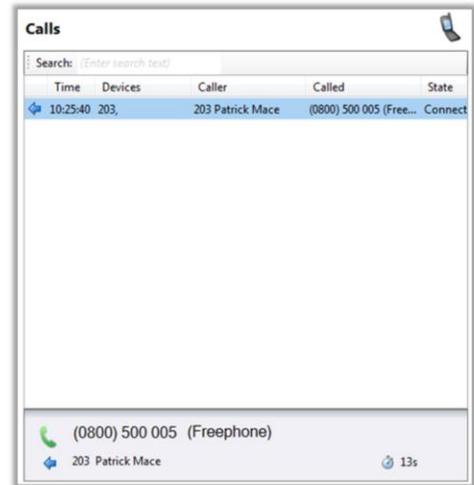
Activity...

## ACTIVITY

So let's begin our tour of the remaining configuration options with a look at the ACTIVITY section.

## Calls

- Real-time display of calls currently in progress.
- If list is long, use the Search facility to locate a particular call.



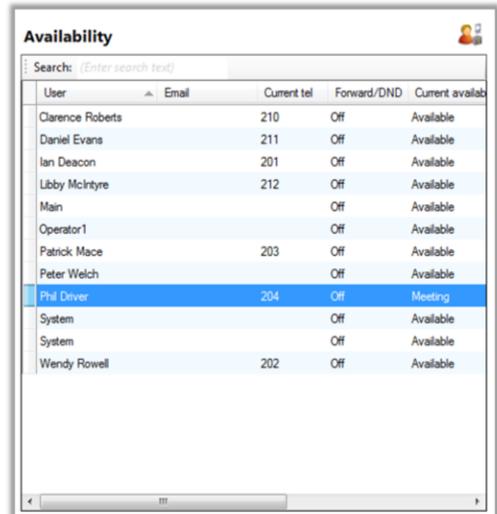
## Activity (Calls)

The CALLS page shows a list of calls currently in progress on the system. The display is updated in real-time, so it can be used to check that all is working ok and calls are going through the phone system.

If this is a large organisation with lots of extensions and concurrent calls, you can search for calls by entering text into the search box.

### Availability

- Shows the current availability status of all Gigaset Pro CTI users.



The screenshot shows a web interface titled "Availability" with a search bar and a table of users. The table has columns for User, Email, Current tel, Forward/DND, and Current availab. The user "Phil Driver" is highlighted in blue and has a status of "Meeting".

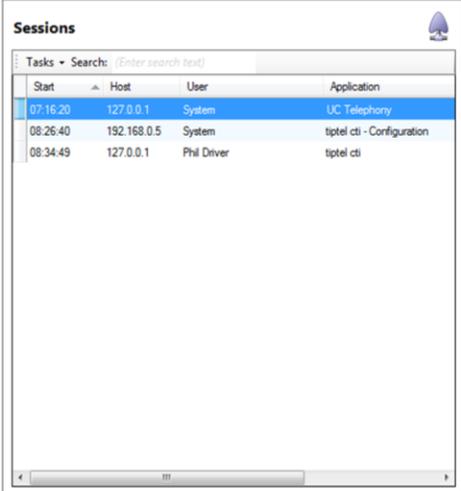
User	Email	Current tel	Forward/DND	Current availab
Clarence Roberts		210	Off	Available
Daniel Evans		211	Off	Available
Ian Deacon		201	Off	Available
Libby McIntyre		212	Off	Available
Main			Off	Available
Operator1			Off	Available
Patrick Mace		203	Off	Available
Peter Welch			Off	Available
Phil Driver		204	Off	Meeting
System			Off	Available
System			Off	Available
Wendy Rowell		202	Off	Available

### Activity (Availability)

The AVAILABILITY page shows the current availability status of all Gigaset Pro CTI users.

## Sessions

- Real-time display of active client sessions.
  - Desktop or mobile clients
  - Server-based services
- The Task menu has options to allow a session to be re-set



The screenshot shows a window titled "Sessions" with a search bar and a table of active sessions. The table has columns for Start, Host, User, and Application. The first row is highlighted in blue.

Start	Host	User	Application
07:16:20	127.0.0.1	System	UC Telephony
08:26:40	192.168.0.5	System	tipitel.cti - Configuration
08:34:49	127.0.0.1	Phil Driver	tipitel.cti

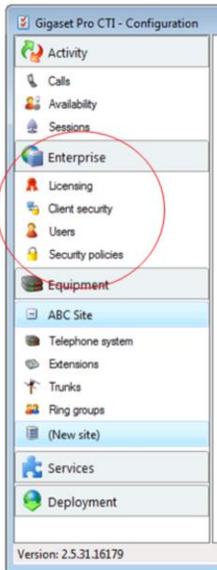
## Activity (Sessions)

The SESSIONS page shows a list of active client sessions. This will include any desktop or mobile clients, plus other server-based services, including the configuration program itself. The following two sessions will always be listed -

- **UC Telephony** is the connection to the phone system.
- **Configuration** is Gigaset Pro CTI talking to itself

As client users log in, you'll see them appear on this page. If this is a large organisation with lots of users connecting concurrently, you can search for users by entering text into the search box.

A user's session can be disconnected (or reset) by selecting it from the list and choosing the 'Reset' option from the 'Tasks' menu.



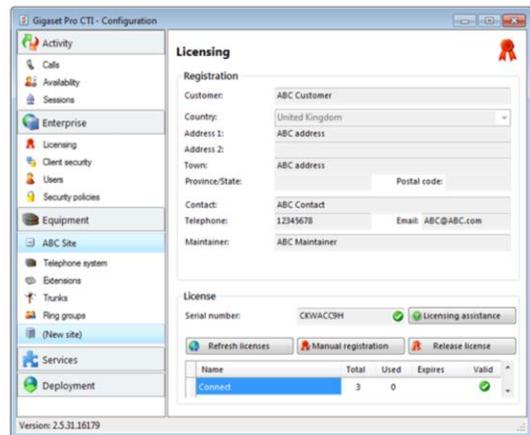
Enterprise...

## ENTERPRISE

Let's move on now to the ENTERPRISE section of the configuration.

## Licensing

- Already seen in the installation wizard.
- May come here from time to time if licensing is added and you need to refresh.
- Or if you need to release the license to re-locate the server on a different PC (via the “Release License” button).
- Primarily used to show licence usage/remaining.
- The “used” column is updated dynamically as users log in and out.



## Enterprise (Licensing)

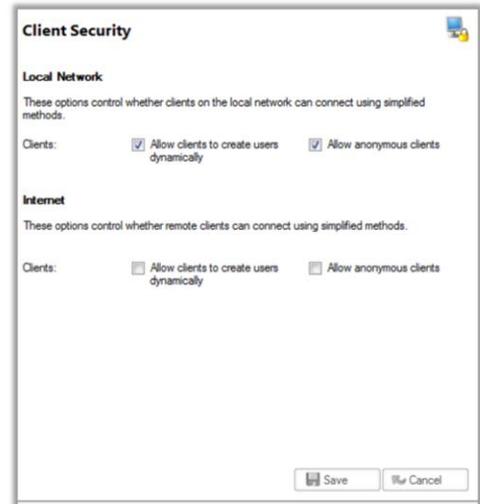
We already looked at the licensing screen in the installation wizard, but you may occasionally come here if you have purchased additional licensing or extended additional client licensing, and you need to refresh the licensing (via the “refresh licenses” button).

You also use this screen if the Gigaset Pro CTI server needs to be relocated to a different computer and the current license needs to be “released” from the existing server (via the Release license button).

Primarily, though, this page is used to allow you to track license usage/remaining – each time a client starts up, the “used” column will be updated accordingly, so you can track this usage to see when you’re approaching current licensing limitations.

## Client Security

- By default, Gigaset Pro CTI client uses Windows Authentication to connect to the server and create a user account.
- Optionally, a user can be anonymous – only the extension details are visible.
- Admin can control the above depending on whether the user is accessing via LAN or Internet.
- Users can also be created manually...



## Enterprise (Client Security)

The Client Security page controls how Gigaset Pro CTI client users can be created, and how those users appear on the system once logged in.

- **Allow clients to create users dynamically** – each Gigaset Pro CTI desktop client uses Windows Authentication to connect to the server and dynamically create a corresponding Gigaset Pro CTI user account. Once this account has been created, the user's Windows credentials are provided each time they login through the Gigaset Pro CTI client.
- **Allow anonymous client** – this allows the user to stay anonymous, meaning that they will just use call control against the extension, but their name will not display in any Gigaset Pro CTI screens (presence, call history etc) .

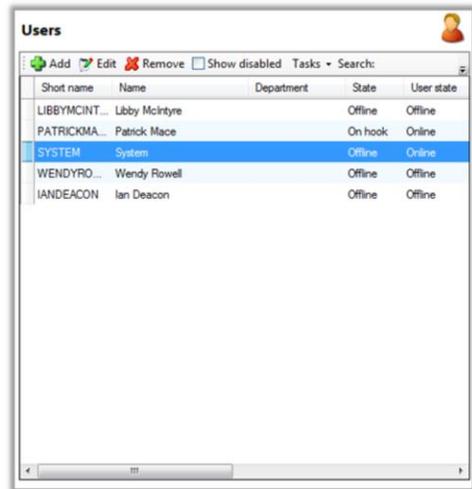
For increased security, the administrator can control the above options dependent on whether the user is logging in via the Local Network or over the Internet.

As well as the dynamic creation of users described above, it is also possible to *manually* create Gigaset Pro CTI user accounts, and then distribute the details of each account (e.g. user name and password) to the appropriate user. This is particularly useful if the site does not allocate a Windows user account per user (i.e. some users

that wish to use Gigaset Pro CTI do not have Windows user accounts).

## Users

- User accounts are stored on the Gigaset Pro CTI Server
- All user accounts can be seen through the Users page.
  - **Edit** existing dynamically-created user
  - Manually **create** new user accounts



## Enterprise (Users)

All user accounts for Gigaset Pro CTI client users are stored on the Gigaset Pro CTI server.

The USERS page allows you to view (and edit) those existing user accounts, and also to manually add new user accounts.

If the appropriate settings have been chosen in the CLIENT SECURITY page (see previous slide), some users may be listed here because they were created automatically when they first started up the PC client on their desktop, authenticating with their windows user name and password. The name being displayed here is taken from the user's Windows user account.

When adding a user manually, you should enter their 'Short name' (or unique login), their full name, and choose a password for them.

## Edit User (User tab)

- Edit user details, change password/email address etc.
- Select Security Policy (*see later*)
- Set/select department
- Options –
  - Hide user status from presence
  - Hide active call details
  - Disable user

## Enterprise (Users) – Edit (User tab)

If you highlight a user in the list and click EDIT, this will take you into an edit user screen, which is divided into 3 tabs (user, telephony, advanced). On the USER tab...

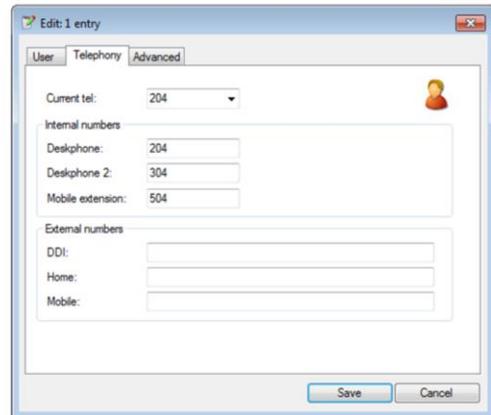
- **Name** is the display name for this user on the Presence screen.
- **Password** is created from the Windows password if dynamically created, otherwise one can be assigned here.
- **Policy** refers to Security Policies, which we will look at later
- **Department** can set the user's department (typing a new one will add to the list)

Four options can also be set for this user;

- **Hide Status** - hides a user's status from other users on the client Presence Screen in the user-centric view.
- **Keep calls private** hides this user's active call details
- **Disabled** disables this user account.

### Edit User (Telephony tab)

- Edit user's internal numbers
- Edit user's external numbers.
- User status will be displayed against all devices.



### Enterprise (Users) – Edit (Telephony tab)

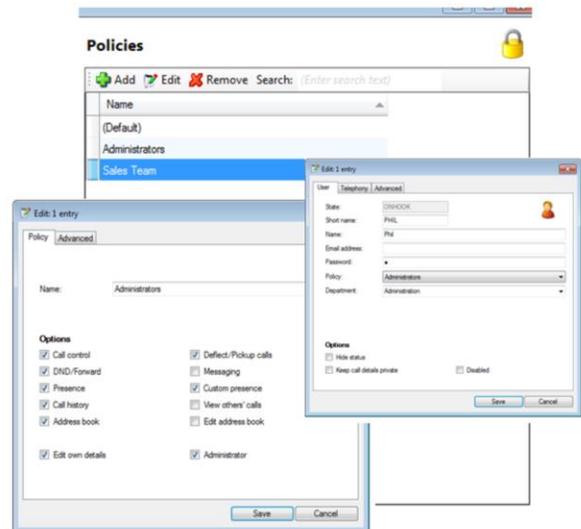
The Telephony tab in the Edit User page is for setting up the extensions and/or devices that this user will be using.

- Internal numbers (Deskphone, Softphone, Mobile extension)
- External Numbers (DDI, Home, Mobile).

If a user is registered against more than one device, when they change their presence or calendar status (automatically or manually) on one device, it will be reflected against all devices.

## Security Policies

- Allow or deny user access to specific features.
- Two standard policies already setup (Default and Administrator) both with maximum rights.
- Usually apply to groups of users, but can be for individuals.
- Set at the user-level via the POLICY drop-down on the user edit screen.
- Lots of options to allow or disallow functions.
- Changes take effect immediately.



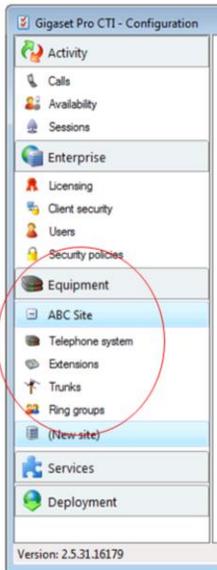
## Enterprise (Security Policies)

Security Policies allow or deny access to specific parts or features of the client software.

At your first visit to this page, there will be two standard policies in the list, 'Default' and 'Administrator', both of which have maximum access rights.

Security policies can be created with either groups of users or individual users in mind, but they are applied at the individual user level (see the "Policy" field on the "user" tab in the user edit page). Each policy requires a name in the 'Name' textbox and a selection of options should be ticked to enable each feature of the client.

If you make a change to the policy, the change will be automatically applied to all users assigned to that policy (without the need to re-start their client).



Equipment...

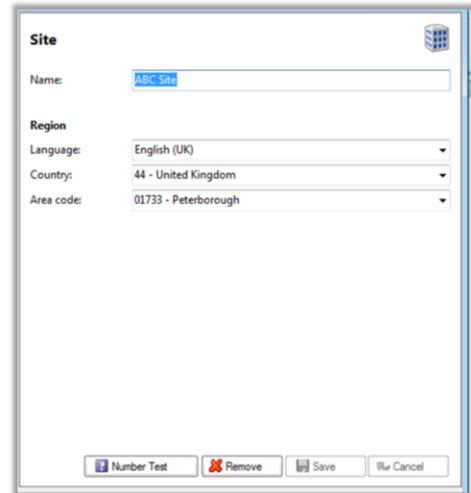
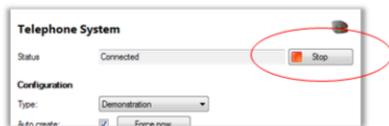
## EQUIPMENT

That concludes our look at the ENTERPRISE section of the configuration.

Let's move on now to the EQUIPMENT section.

## Site

- Already seen in the installation wizard.
- Any changes to the site details only take effect if the server's connection to the phone system is stopped and restarted.
- This is done via the STOP/START button on the Telephone System page.



## Equipment (Site)

We already completed the SITE page during the installation wizard, so unless the site name needs to be changed (or the company moves physical location), it's unlikely that this page will be accessed after the initial installation.

However, if changes *are* made, the connection of the Gigaset Pro CTI server to the telephone system will need to be stopped and started. This is done using the stop/start button on the TELEPHONE SYSTEM page.

The TELEPHONE SYSTEM and EXTENSIONS pages in the Equipment section of the configurator we re also covered in the installation wizard.

### New Site

- The “new site” page is used to add additional sites to this Gigaset Pro CTI installation (e.g. when using Gigaset Pro CTI Site or Federation).
- Important: Keep extension ranges unique across the sites, don't duplicate.

The screenshot shows a web form titled "Site" with a small icon in the top right corner. The form contains the following fields:

- Name:** A text input field containing "ABC Site".
- Region:** A section header.
- Language:** A dropdown menu with "English (UK)" selected.
- Country:** A dropdown menu with "44 - United Kingdom" selected.
- Area code:** A dropdown menu with "01733 - Peterborough" selected.

At the bottom of the form, there are four buttons: "Number Test", "Remove" (with a red X icon), "Save", and "Cancel".

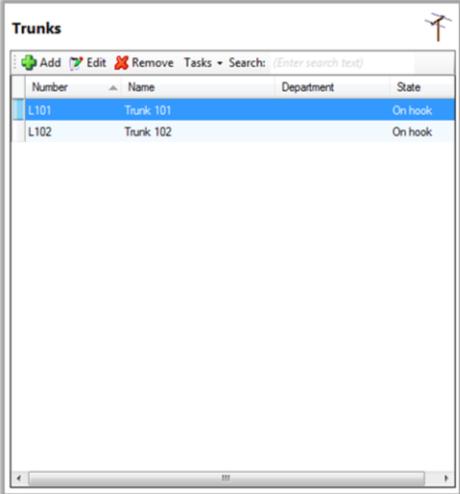
### Equipment (New Site)

The NEW SITE page is used to add additional sites to this Gigaset Pro CTI installation, which is generally only applicable when setting up a multiple site environment (with Gigaset Pro CTI Site or Federation).

Important: When creating multiple sites, it is strongly recommended that you keep the extension ranges unique across the sites, don't duplicate the same extensions across more than one site.

## Trunks

- For when calls are being passed around by Gigaset Pro CTI users.
- Keeps track of the CLI
- Make sure they are “on hook”



Number	Name	Department	State
L101	Trunk 101		On hook
L102	Trunk 102		On hook

## Equipment (Trunks)

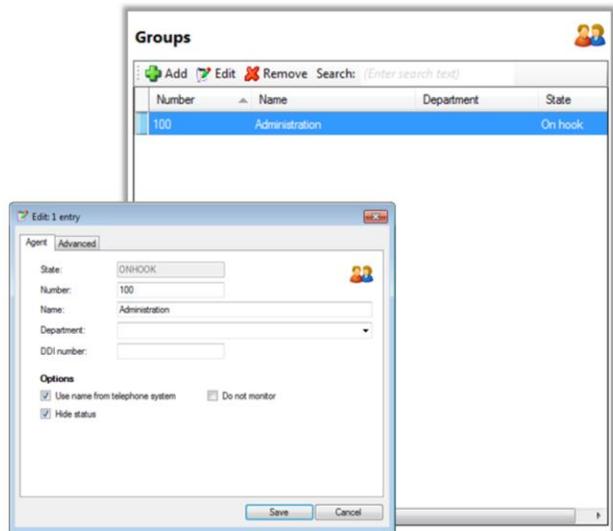
The TRUNKS page shows the trunks that allow the Telephony service a greater degree of accuracy when tracking calls.

When the trunks are listed correctly, the Telephony service should be able to correctly identify external calls and calls from a withheld number, and track calls that are transferred.

Don't worry too much about the names, just make sure they are “on hook”.

### Ring Groups

- For phone systems that support groups
- Gigaset Pro CTI can allocate a meaningful name to the group
- Ideal for call centres.

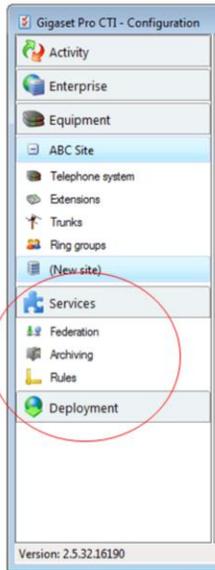


### Equipment (Ring Groups)

On telephone systems that support groups, such as ring groups and call centre distribution groups, the RING GROUPS page will display those groups and their details.

Gigaset Pro CTI can use the groups to display a meaningful name to the group, which is visible to users through the client software.

This is particularly useful for customers who operate as call centres for various customers. When a Gigaset Pro CTI user answers a call (ringing for a DDI) they want to know on which of their customer's behalf they are answering the call.



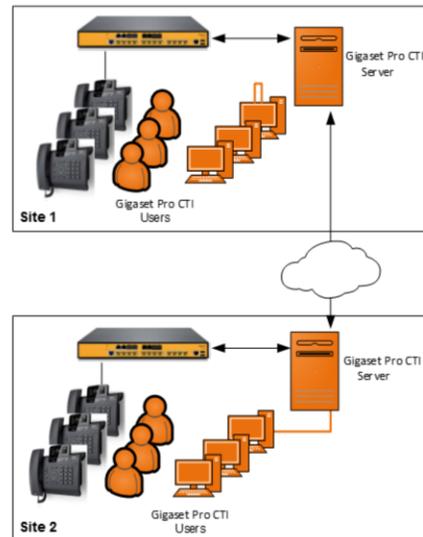
Services...

## SERVICES

The next section of configuration screens that we need to review is the SERVICES section.

### Federation

- Integration of multiple Gigaset Pro CTI servers.
- Similar user experience to Gigaset Pro CTI Site (e.g. shared features), but better suited to environments where a lower quality network connectivity exists between the various sites.
- If connectivity between sites is interrupted, users at each site can continue to use Gigaset Pro CTI locally.
- Federation licensing required for each Gigaset Pro CTI server participating in the Federation.



### Services (Federation)

The Federation feature of Gigaset Pro CTI allows up to six Gigaset Pro CTI servers to be connected (or federated) allowing geographically separate sites to share presence and chat data.

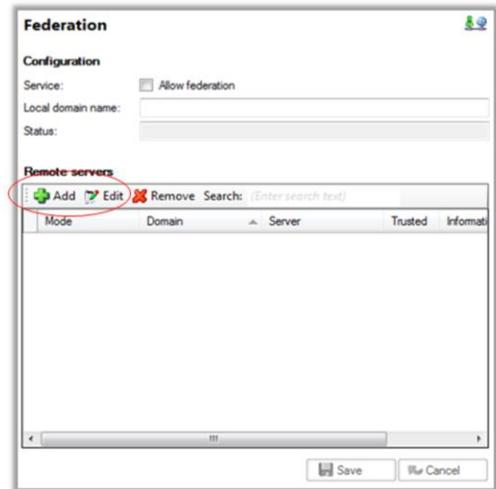
Federation provides a very similar end user experience to Gigaset Pro CTI Site, but it is better suited to environments where a lower quality of network connectivity exists between the various sites.

Unlike with Gigaset Pro CTI Site, which requires a continual network connection between the Gigaset Pro CTI server and the multiple sites, when a connection goes down in a federated environment, the federated sites can continue to use Gigaset Pro CTI services such as messaging and presence, albeit restricted to the local user base.

A federation license is required for each Gigaset Pro CTI server that will participate in the federation.

## Federation (Instigation)

- Instigate federation from one server, accept on another.
- On the **instigating** server –
  - Service - Tick to allow federation.
  - Local Domain name - The name of this instigating site
  - Click Add in the Remote Servers section...



See Federation setup guide for full details

## Services (Federation - Instigation)

Federation is configured through the FEDERATION page in the services section of the configurator.

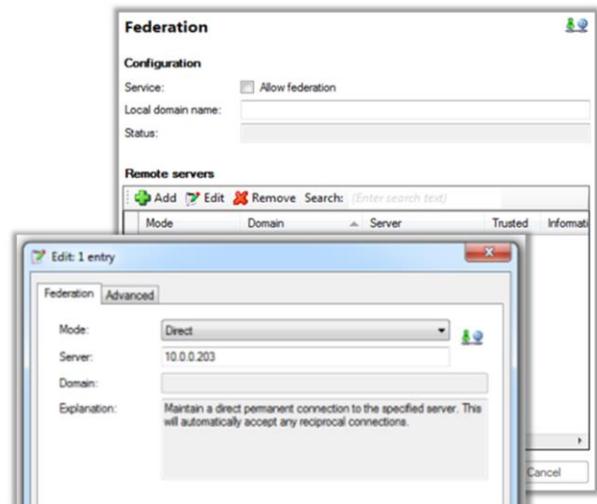
*Instigation* of the federation is done from one Gigaset Pro CTI server, and *acceptance* of federation is completed on the other server.

On the instigating server, tick the “Allow Federation” option, and then in the “Local Domain Name” text box provide a name for this server that is instigating the federation request.

Then click the Add button in the “Remote Servers” section.

### Federation (Instigation - Add)

- Mode – Choose Direct.
- Server – IP address of the other Gigaset Pro CTI server
- Click SAVE.



*See Federation setup guide for full details*

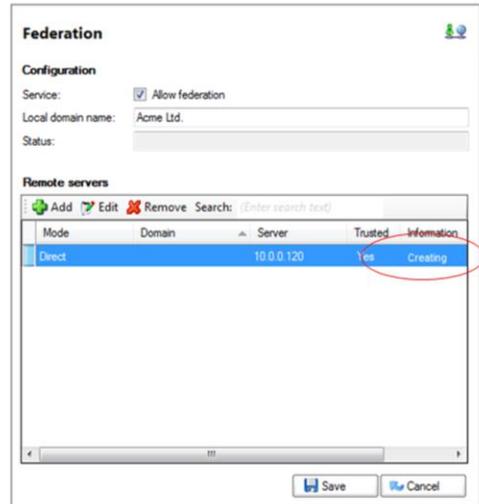
### Services (Federation – Instigation, Add)

Select “Direct” for the Mode, then provide the IP address for the other server that will participate in the federation.

Click save...

### Federation (Instigation - Waiting)

- The Remote Servers section will display the current status of the federation connection
- Until the other server accepts the federation, the status will be “creating”.

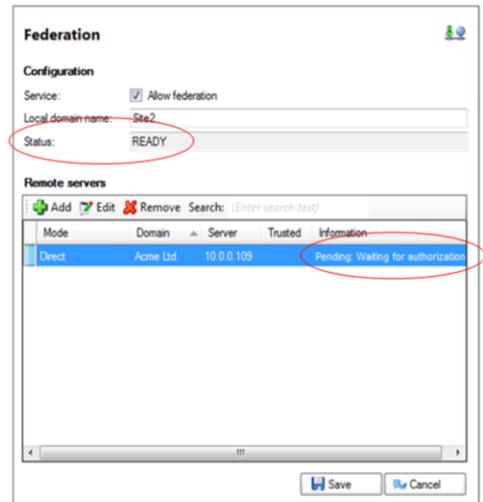


### Services (Federation – Instigation, Waiting)

...and the Remote Servers section will be updated to show the status of the federation request, which will be in “creating” status until the other server accepts the federation.

### Federation (Pending)

- The status on the Accepting server is shown as "Ready" in the federation connection is Pending.
- Click EDIT...



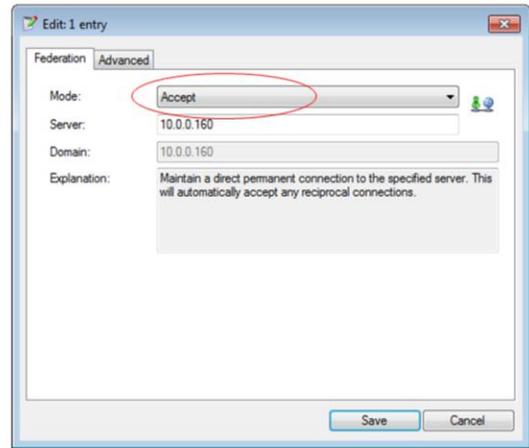
### Services (Federation - Pending)

On the other server, again the in the Remote Servers section on the Federation page, a similar status line will be displayed to indicate that a federation request from another server is ready for completion but currently in pending status.

Click EDIT...

### Federation (Acceptance)

- Mode – Choose Accept.
- Click SAVE.
- *See the Federation Setup Guide for full details.*



### Services (Federation - Acceptance)

.....and change the Mode to "Accept".

When you click SAVE, the federation connection will be completed and active.

Please refer to Federation Setup Guide for full details on setting up and managing federation across two or more Gigaset Pro CTI servers.

## Archiving

- Set the number days that calls and messages details are stored on the Gigaset Pro CTI Server.
- If values left blank, defaults will apply.
- If values are 0, no calls or messages will be stored.

**Archiving**

**Storage**

Number of days to keep

External calls:  (Default: 60)

Internal calls:  (Default: 7)

Messages:  (Default: 60)

Save Cancel

## Services (Archiving)

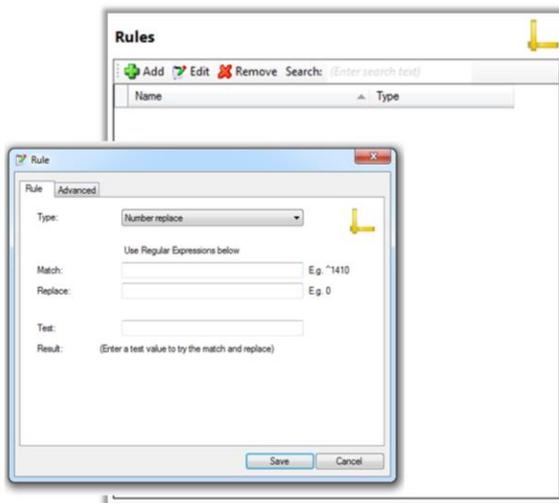
All data related to calls and messages are stored in an SQL database on the Gigaset Pro CTI server. By default, external call history is kept for 60 days, internal for 7, and messaging for 60 days....but these defaults can be changed in the ARCHIVING page in the Services section.

If you leave the text boxes blank, the default values will be used; they can be seen listed alongside the text boxes.

If you do not want to store anything, enter '0' (zero) into the relevant text box.

## Rules

- Replaces portions of numbers.
- E.g. If "Least Cost Routing" is causing call information to be displayed incorrectly.



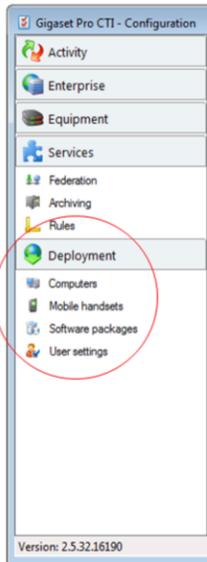
## Services (Rules)

The Rules service is used to replace portions of numbers if, for instance, 'Least Cost Routing' is causing call information to be displayed incorrectly.

To add a rule –

- Click the 'Add' button
- Enter a regular Expression in the 'Match' and 'Replace' boxes.

To test the rule, enter a telephone number in the 'Test' box and review that the result is as required. Rules defined here will take precedence over rules defined elsewhere.



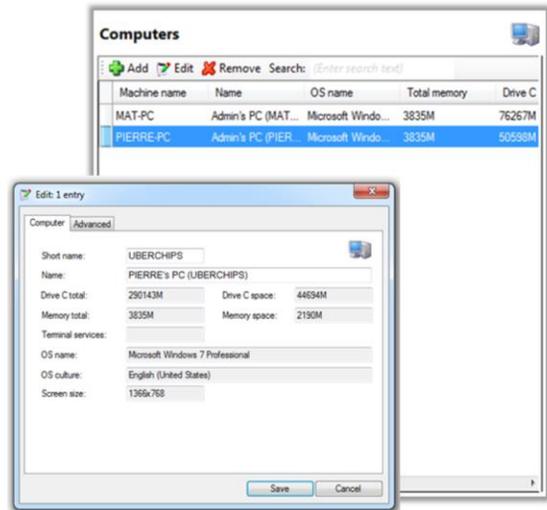
Deployment...

## DEPLOYMENT

The final section of configuration screens that we need to review is the DEPLOYMENT section.

## Computers

- List of all user computers with the Gigaset Pro CTI client software installed.
  - **Short name** is computer's NetBIOS name on the network.
  - **Name** is descriptive name for use only in Gigaset Pro CTI.
- Enables the administrator to track usage and distribute software packages and upgrades.



## Deployment (Computers)

As the Gigaset Pro CTI client software is installed and used on client PCs, the PCs will become registered and known to the Gigaset Pro CTI Server. When a Gigaset Pro CTI client connects to the server, you'll see a line for that PC in the COMPUTERS display.

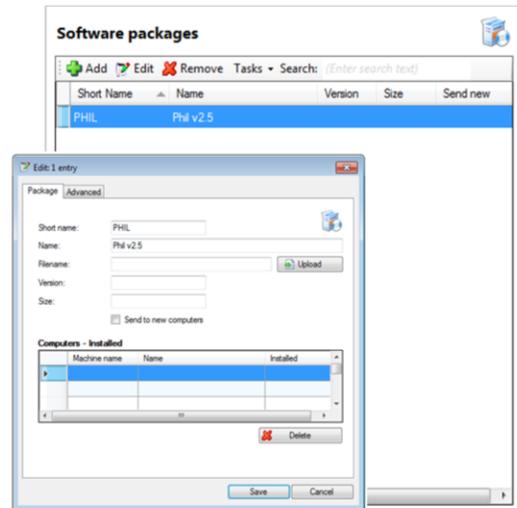
You can view a computer's information by selecting it and then choosing 'Edit' from the menu bar.

- The **Short name** is the PC's NetBIOS computer name on the network.
- The **Name** box allows you to assign a descriptive name to the computer that will only be used in Gigaset Pro CTI. By default, if the user named Pierre was using the PC with NetBIOS name UBERCHIPS, the name on this page would be "Pierre's PC (UBERCHIPS)". If you want, you can modify the computer name that appears here and click 'Save'.

This computers page allows you to not only track the Gigaset Pro CTI PCs, but also offers the ability to distribute software packages and upgrades when available.

## Software Packages

- Gigaset Pro CTI provides regular version upgrades as software packages.
- Use the software packages to administer and distribute to PCs running Gigaset Pro CTI clients.
- Allows easy deployment of upgraded software to multiple client PCs.
- Click ADD, UPLOAD the desired .PKG file, and SAVE...



## Deployment (Software Packages)

As and when new software enhancements become available for client software, they are distributed to Gigaset Pro CTI customers as Software Packages. The administration of these software packages, and the distribution of the upgraded software, is handled through the SOFTWARE PACKAGES page.

By using this feature, rather than going around each user PC to install the upgrade, multiple clients can be upgraded in one go via the push of a button.

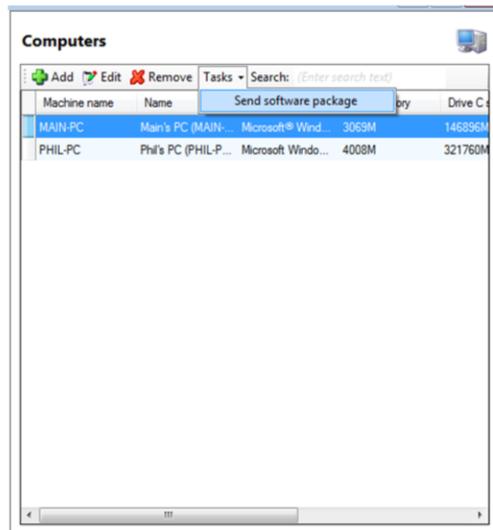
Gigaset Pro CTI provides you with a software deployment file, and you click on ADD , and then UPLOAD, which will save the software package information and then store the package distributable file on the Gigaset Pro CTI server.

You can enter a name and short name for the package, but this information is usually filled in already.

Click SAVE and the software package will appear in the list of software packages available.....

## Software Packages

- Once a software package has been uploaded...
  - Go back to the Computers page.
  - Select the PC(s) to upgrade
  - Click “tasks” and then “send software package” and select the package.
- The PC client will be upgraded the next time it is started.



## Deployment (Software Packages) - Distribution

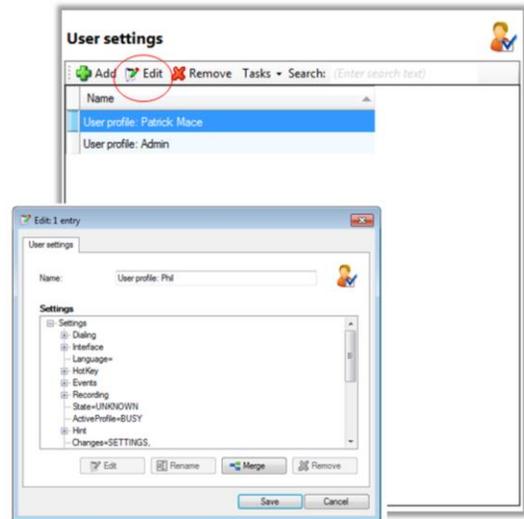
To deploy the software upgrade out to one or more PCs –

- Go to the COMPUTERS page
- Select the client PCs that you want to upgrade
- Click on TASKS
- Then select “Send Software Package”
- Select the software package from the list.

The upgrade file is sent to a client’s PC as part of the deployment process when the client software next starts.

## User Settings

- When a user runs the client software for the first time, an entry is created for them in the User settings page.
- Users can personalise and configure their client....stored on the server so that they pickup this customisation from any PC
- This screen allows the admin to see those user settings (via EDIT)



## Deployment (User Settings)

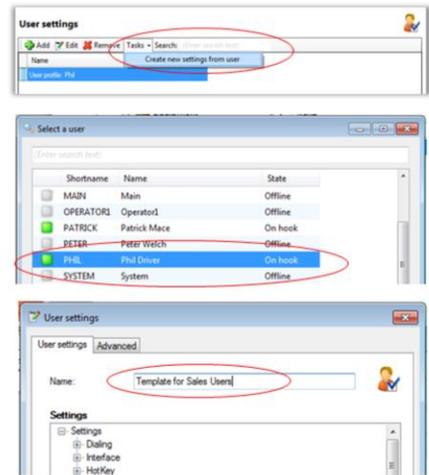
As we explained earlier when describing the User page in the Enterprise section, when the Gigaset Pro CTI client runs on a PC for the first time, an entry is created for that user in the USER SETTINGS page.

Users can configure and personalise their client software, and this configuration information is then stored on the Gigaset Pro CTI server so that if the user logs in via another client on another PC, they will pick up their personalised settings.

The USER SETTINGS page allows you to see users' current configuration settings.

### Public Profile (Create)

- You can setup a “public profile” of user settings to deploy across multiple users -
  - **Step 1:** Configure a client with the required settings.
  - **Step 2:** In the User Settings list, click on “Tasks” and select “Create new settings from user”
  - **Step 3:** Select the user that you configured in Step 1. This will create a new profile.
  - **Step 4:** Change the name of the new profile to reflect that it is a public profile or “template” of user settings. (You can actually edit the settings here too, if you want to make any changes). Click Save.
- *You’re now ready to deploy...*



### Deployment (User Settings) – Public Profile (Create)

As well as viewing and changing a single user’s settings, you can also setup a public profile and deploy the settings in that profile to many users in one go.

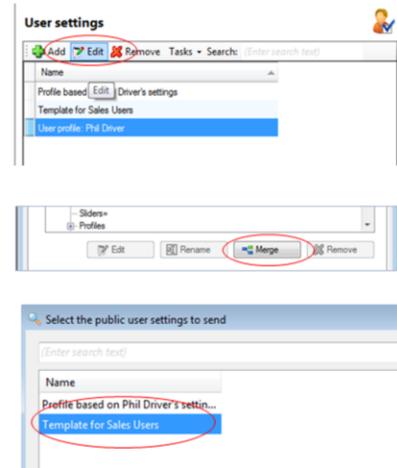
First, use the client software to configure a client with the settings that you wish to deploy. Then, in the USER SETTINGS page, click TASKS and “create new settings from user”. Pick your configured user from the list offered, which will create a profile with “profile based on (selected user name) settings”.

Rename this new profile to something appropriate and optionally use the REMOVE option to take out all of the default/unchanged settings, then click SAVE.

With your new public profile setup, you’re ready to deploy it...

### Public Profile (Deploy to 1 user)

- To deploy the public profile's settings to a *single* user -
  - Go to the User Settings page and highlight the user that you want to deploy the public profile to.
  - Click Edit
  - Click the “merge” button at the bottom of the edit screen
  - Select the public profile that you want to deploy to this user.



### Deployment (User Settings) – Public Profile (Deploy to 1 user)

If you want to deploy a public profile to just one user, go to the User Settings page and highlight that user. Click Edit, then the “merge” button at the bottom of the edit screen. Select the public profile that you want to deploy to this user.

### Public Profile (Deploy to multiple users)

- To deploy the public profile's settings to *multiple* users -
  - Go to the USERS configuration page.
  - Select the users that you want to deploy the public profile to.
  - Click on "Tasks" and select "Apply user settings"
  - Select the public profile that you want to deploy to these users.



### Deployment (User Settings) – Public Profile (Deploy to multiple users)

If you want to deploy a public profile to multiple users, go to the USERS page in the Enterprise section of the configurator, select the users that you want to deploy the profile to, then click TASKS and APPLY USER SETTINGS, and pick the public profile. This will deploy the public profile's settings out to all of those users.

## Support and Services

Service	Description
Support	Please go to <a href="http://gigasetpro.com">http://gigasetpro.com</a>

### Warranty

The software comes with a **3 month** manufacturer's warranty. For support outside the scope of the warranty and for the right to upgrade, a software assurance contract is required.

**THANK YOU**