



Smile 2.3

**ascom**

# Technical Guide

Version: 1.0





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## Revision

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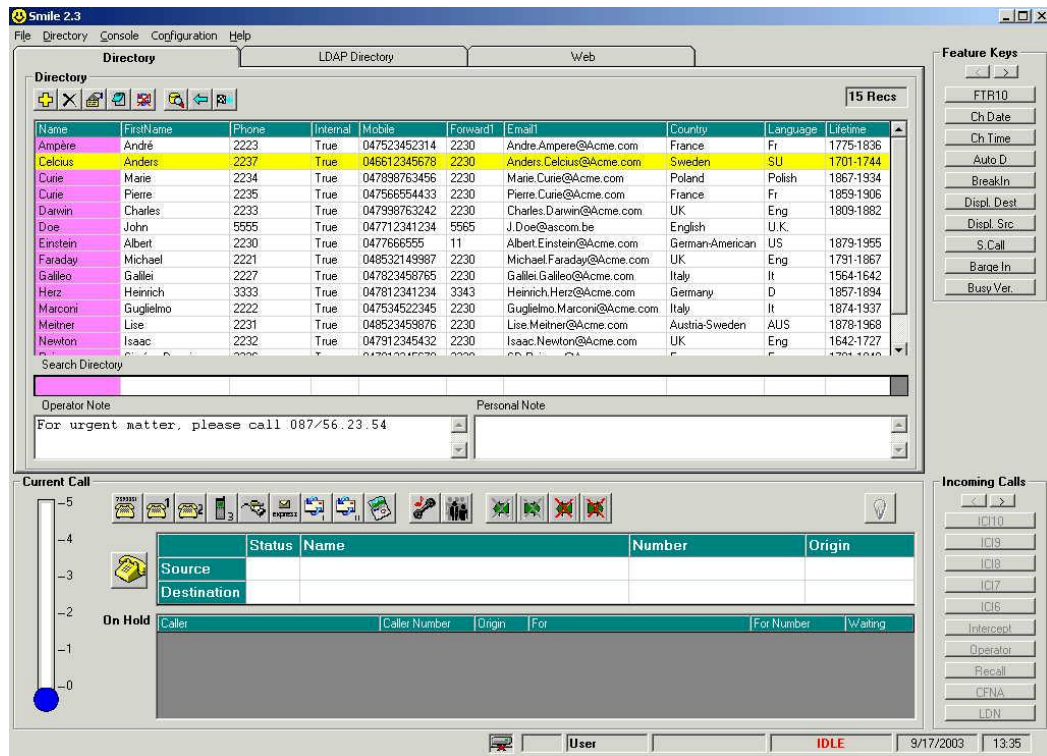
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# 1 Getting Started

## 1.1 PRODUCT OVERVIEW

### 1.1.1 User Interface



The Smile user interface has been specially designed to provide on a single window all the relevant call information, no need to swap between multiple windows.

Icons are available for call handling: off/on hook, Forward, Redial, Hold, Conference, Email, etc...

By placing the mouse pointer on an icon of the Smile user interface, the operator will get a tip containing the name of the icon and the corresponding shortcut key.

Trunk Group Busy alarm can generate an immediate warning on screen.

The Smile User Interface is fully sizable (minimum 800x600 pixels – 256 colours) and available in most European languages: Deutsch, English, Español, Français, Italiano and Nederlands. Distributors can also localise the Smile by translating the user interface in their local languages.

Configurable buttons (links) can be added on the main screen in order to launch external applications (like Directory CD-Rom).



### 1.1.1.1 CALL HANDLING

The Smile screen based console interfaces to the Meridian-Succession consoles M2250 and CIU. With advanced call handling capabilities, operators can answer, transfer, announce, park, hold and place calls using their Personal Computer.

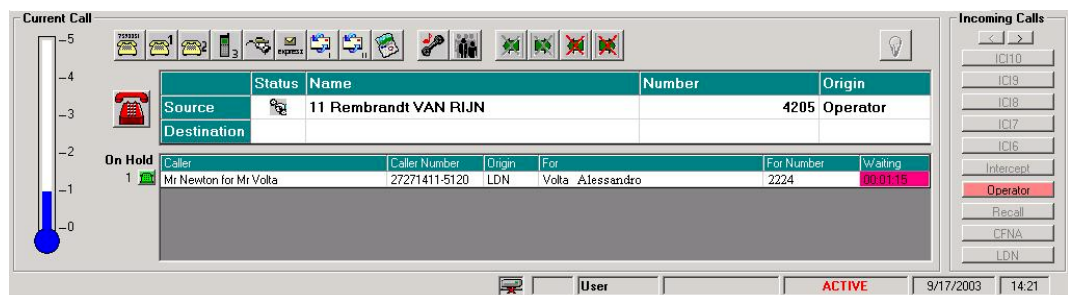
The Smile main screen holds all information related to a call: name, number, origin and status.

Incoming calls can be treated in three different ways:

- via the automatic Smile off hook algorithm. The incoming calls are handled in a pre-defined order: VIP calls, Call Forward No Answer, Recall, Intercept and finally direct internal calls.
- via the Meridian FIFO algorithm: the calls are treated in the same order as they arrived.
- via operator priority by pushing directly the ICI keys: the operator can manually choose the call that he/she wants to treat.

A thermometer indicates the number of calls waiting. It will change from blue to red if the number of calls waiting exceeds a predefined number

Multiple alternatives are available: Forward1, Forward2, Mobile, Post or Redial, Express Messaging, Email1, Email2



The screenshot displays the Smile console interface. On the left, a vertical thermometer indicates the number of calls waiting, with a scale from 0 to 5. The main area is divided into 'Current Call' and 'Incoming Calls' sections.

**Current Call:**

Status	Name	Number	Origin
Source	11 Rembrandt VAN RIJN		4205 Operator
Destination			

**On Hold:**

Caller	Caller Number	Origin	For	For Number	Waiting
1 Mr Newton for Mr Volta	27271411-5120	LDN	Volta Alessandro	2224	00:01:15

**Incoming Calls:**

- ICI10
- ICI9
- ICI8
- ICI7
- ICI6
- Intercept
- Operator
- Recall
- CFNA
- LDN

At the bottom, the status bar shows 'User', 'ACTIVE', '9/17/2003', and '14:21'.

Each feature or function can be accessed via mouse click and shortcut keys.

### 1.1.1.2 HOLDING A CALL

If needed, the operator can place a call on hold and assign a label to it, containing information about the called and/or calling party. This label stays permanently visible for the operator. The Smile keeps also the name and the telephone number of the person to whom he/she has tried to extend the call. A timer shows how long a call is already on hold. A reminder will indicate to the operator if a call stays too long on hold.

All this information contributes to guarantee a more efficient call handling.

### 1.1.1.3 MULTI-CRITERIA SEARCH


It happens that one criterion is not sufficient to find the correct person in the database (e.g.: the database contains 10 persons whose last name is Smith). The Smile program allows you to perform a multi-criteria search: a combination of different criteria guides the operator to find the required information in no time.

The operator will be in position to find immediately the most qualified person for each call, without shuttling your customer from extension to extension.

### 1.1.1.4 INCOMING CALLS INDICATORS AND FEATURE KEYS

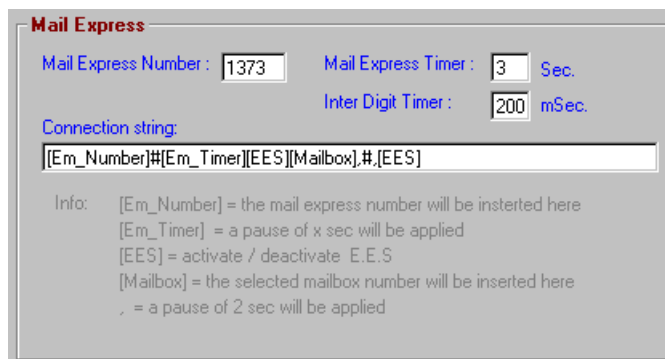
The Incoming Calls Indicators and Feature keys are displayed on main screen. A direct access allows the operator to use them.

### 1.1.1.5 EXPRESS MESSAGING

Smile can interact with major Voice Mail systems. The Express Messaging icon  allows the operator to easily extend the caller to the called party voice mailbox.

To forward a call to the voice mailbox of the destination, the operator will press Ctrl+5 or click on the messaging icon. A dialog box containing the phone number of the active record will appear. The operator will have to accept or to change it by entering another mailbox number. The Smile application will automatically call the Voice Mail system, wait an answer and enter the mailbox number. When this is done, the operator has just to press the Release key to allow the caller to leave his voice message.

Thanks to the connection string, Smile can interact with major Voice Mail systems. By default the connection string is initialised for the Meridian Mail or CallPilot but you can customise it to meet your Voice Mail system specifications.



**Mail Express**

Mail Express Number :  Mail Express Timer :  Sec.

Inter Digit Timer :  mSec.

Connection string:

Info: [Em\_Number] = the mail express number will be inserted here  
[Em\_Timer] = a pause of x sec will be applied  
[EES] = activate / deactivate E.E.S  
[Mailbox] = the selected mailbox number will be inserted here  
, = a pause of 2 sec will be applied

## 1.1.2 Database Integration

If the attendant has to search for a person in the database, he/she can do it by name, by phone number or by whatever criterion available in the database. Every record also contains a memo field, where the operator can see information concerning the person (for example that he is on holiday till end November).

By a simple click on a tab the Smile phonebook can be changed into a LDAP directory that can be used to call a person or service.

### 1.1.2.1 SMUPDATE

It allows you to do an automatic update of the Smile database with a simple text file as source (e.g. OTM's corporate directory). The existing records will be updated, the new records will be created and the old records will be deleted. This update can be scheduled or started manually.

### 1.1.2.2 THE LDAP LOOKUP

Allowing you to consult the LDAP directory of the company, it gives you the same features as with the local Smile directory:

- Looking up names and telephone numbers
- Multi-criteria search
- Placing a call using the telephone numbers found in the LDAP directory

### 1.1.2.3 THE LDAP UPDATE

The LDAP Update is used to update the content of your local Smile database with the information retrieved from the LDAP directory. This update can be scheduled or can be initiated by the user.

This means only one centralised database to maintain!

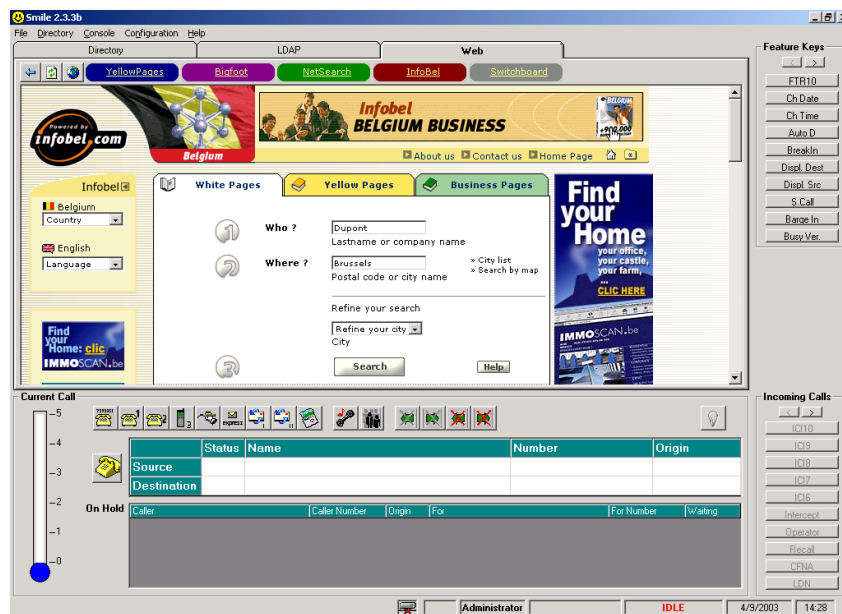
Maintaining your database up-to-date via the import routines or automatic update from a LDAP server is a reality offered to simplify the most important role of Smile, which is « Improve Customer Service ».

### 1.1.3 Networking

When you have two or more Smile applications running on your network, you can use the Networking function to centralise all the records in one master database that will be used by all the applications. Every time an operator makes a modification in the database (e.g. updating the information of a memo field), it will be automatically visible for all the operators working in the same Smile network.

### 1.1.4 Web Browser

Open a web site within the smile interface (5 quickly selectable favorites) allowing the operator to use the phone number found on the web to place a call (Requires Internet explorer 5.0 or higher)



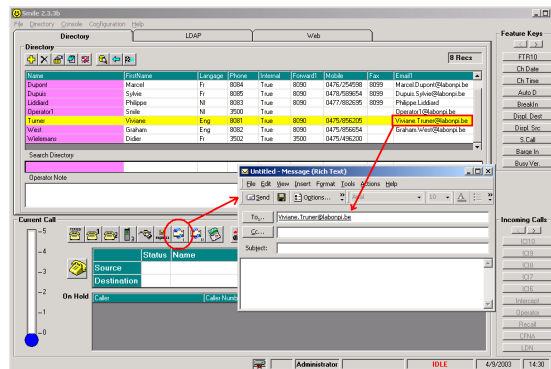
## 1.1.5 E-mail

### 1.1.5.1 THE PERSONAL NOTES

The employees of a company can send a mail to a predefined Smile e-mail account (e.g.: Smile@company.com), with a short message. This message will appear on the Smile interface in the 'Personal Notes' field. The notes are specific to each person stored in the repository and show up when this particular person is filtered out. (Requires a POP3 compliant e-mail server and a dedicated Smile mailbox)

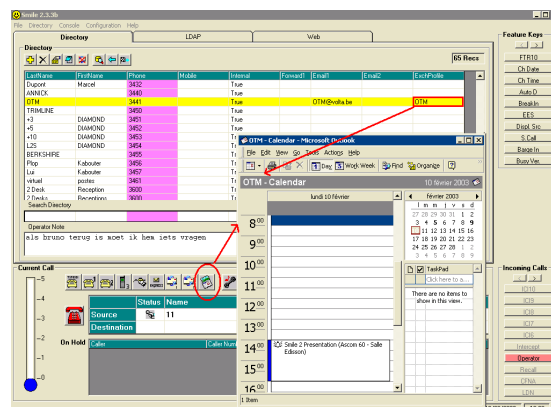
### 1.1.5.2 THE SEND MAIL

The operator can send a mail to the person in focus assuming that his e-mail address has been filled in. (Requires a SMTP compliant e-mail server)



### 1.1.5.3 THE OPEN CALENDAR

The operator can open the agenda of a looked-up person in the local repository, when clicking the 'calendar' button. This way the operator can verify the person's agenda. (Requires MS Outlook)



## 1.2 PACKAGING

Ascom Smile software is available in 4 options:

- Standard: All telephony functionalities + LDAP Lookup + SmUpdate
- Advanced: Networking + Web + LDAP Update
- Premium: Personal Notes, Send Mail, Open Calendar
- VIP: Visually Impaired People

		Packages			
		Standard	Advanced	Premium	VIP
Features	Telephony functionalities	X	X	X	X
	SmUpdate	X	X	X	X
	Networking (since Rls 2.1)		X	X	X
	LDAP LookUp (since Rls 2.2)	X	X	X	X
	LDAP Update (since Rls 2.2)		X	X	X
	WEB (since Rls 2.3)		X	X	X
	Email (Since Rls 2.3)			X	
	VIP features				X

### 1.2.1 The standard package

- Telephony functionalities.
- Smile license includes Dutch, English, French, German, Italian and Spanish screen text. The Smile graphical user interface is also translatable by the local distributor.
- Ideal for standalone workstation.
- 3 Search mechanism on incoming call (SeekMode): No search/search on CLID/Search on DNIS.
- Search criteria change via left/right cursor move
- Configurable buttons (links) on main screen. Used to launch external applications (like directory CD-Rom).
- Resizable graphical user interface (min: 800x600 – 256 colours)
- Operator note functionality.
- Reporting: 4 standard reports
- LDAP Lookup: allows the operator to query an LDAP database and to use the
- SmUpdate: import of a comma delimited .txt or a .csv file.
- Compliant with Microsoft Windows 98SE, NT4 SP6, Win 2000 Prof and Win XP Prof.
- Database in MS Access 97 or MS Access 2000 format. (MDAC 2.6 standardisation)
- Automatic installation routine
- Automatic conversion of old Smile 1 database to Smile database.
- Dongle protection of the software.

### 1.2.2 The advanced package

The entire Standard package features.

- Networking of consoles with common database on file server.
- LDAP Update: Update of the Smile database based on the LDAP Directory content
- Web browser functionality

### 1.2.3 The premium package

The entire Advanced package features

- Send Mail functionality
- Personal Notes Functionality
- Open Calendar functionality.

### 1.2.4 The Smile VIP package : (Visually Impaired People)

Thanks to a powerful 'text to speech' application the visually impaired people can easily drive the operator desktop. Jaws, the leading "text to speech" driver in most blind applications, will run on top of the Smile. Smile VIP requires Windows 2000 Prof.

## 1.3 REQUIREMENTS

### 1.3.1 PC Hardware

- Pentium III – 800 MHz
- HD 1GB for the operating system and Smile. ( + 4 KB by additional record in the phonebook)
- 128 MB Ram for Windows 98 and NT4 Workstation, 256 MB Ram for Windows 2000 Prof. and Windows XP Prof.
- 1 CD ROM
- 1 parallel port (Dongle)
- 1 serial RS232 port (Console)
- 1 network card for the LDAP, Networking, Web browser and email features
- Video card with 1024 x 768 - 256 colours
- 1 Display SVGA 17" or 15" TFT

### 1.3.2 PC Software

- Windows 98SE, Windows NT4.0 SP6a workstation, Windows 2000 Prof. or Windows XP Prof.
- Internet Explorer 5.0 or higher
- Smile is LDAP V2 compliant: MS Exchange 5.5 and 2000, MS Active Directory 1.0, Novell eDirectory 8.6 and Netscape Directory Server 4

### 1.3.3 Premium package extra requirements

- Send e-mail: e-mail client installed on the Smile workstation
- Open Calendar: e-mail client MS Outlook and e-mail server MS Exchange
- Personal Note: e-mail server compliant with POP3 and SMTP.

MS Windows 98 SE does not support the Personal Note.

### 1.3.4 PBX Interface

- M2250
- CIU (Console Interface Unit)



## 2 Smile

---

### 2.1 INTRODUCTION

When you order the Smile software you should receive the Smile Box containing:

- a CD-ROM: software, drivers and documentation



Note that the Smile software is also downloadable for the dealer on our Web Site:

[www.ascom.be/smile2/download](http://www.ascom.be/smile2/download)

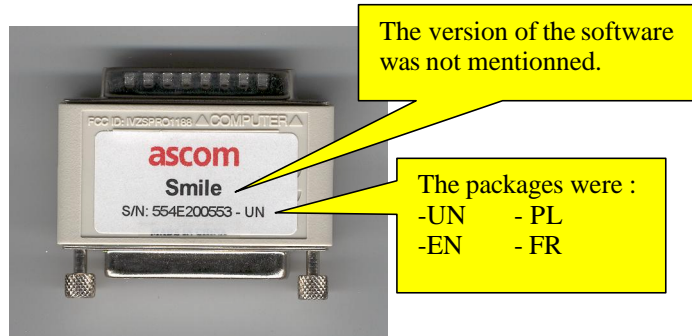
- the Sentinel SuperPro Dongle :

This is a hardware key that will be fitted on the parallel port of the operator desktop. It protects your Smile software from illegal copy and determines the Smile Package.

The serial number (SN xxxxxxxxx) and the type of your Smile package are also indicated on the dongle.



Note the differences with the previous Smile 1 dongle:



The previous Smile 1 dongle is not suitable for the new Smile 2 software.

- The product release bulletin.

## 2.2 REQUIRED SETUP DATA

In order to install and to configure the Smile software you will need the following setup data:

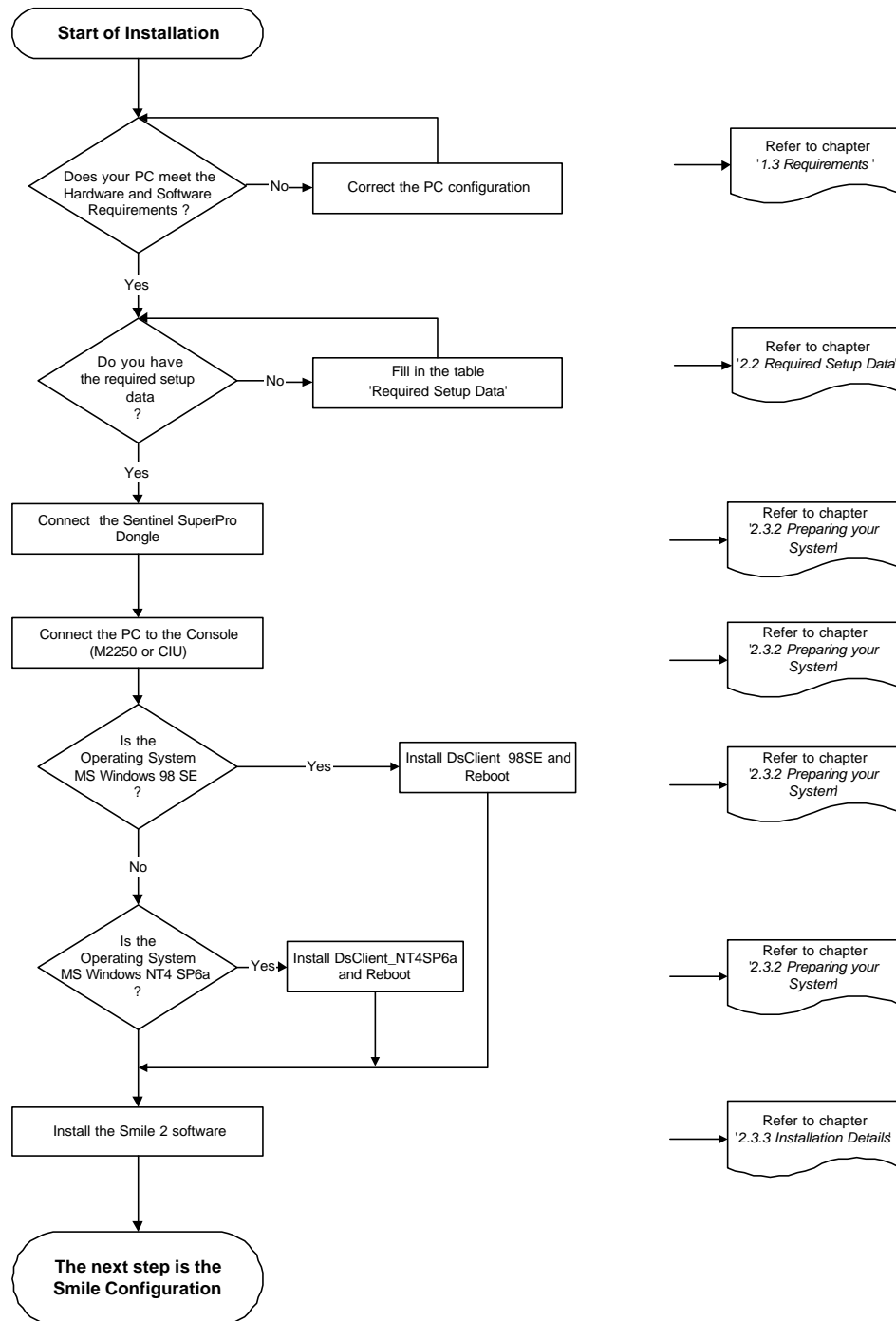
	Setup data	Value
Smile application	Installation Path (Default : c:\Program Files\Smile)	.....
	Special fields to add to the Smile database	1. .... 2. .... 3. .... 4. .... 5. .... etc ...
	Console ID (Default value is 0 for a standalone system)	.....
	COM port number (Default : 1)	.....
	Incoming Calls Algorithm	Smile / FIFO
	SeekMode	No Seek / CLID / DNIS
	Outgoing Calls Search Mechanism	Active / Out of service
	Calls On Hold Threshold	..... (sec.)
	Maximum Calls Waiting	5 / 10 / 20 / 50 / 100
	Critical Call Waiting	.....
	Location of the old Smile 1.x phonebook ? (if needed)	.....
Voice Mail System	Type	Mmail / CallPilot / Other
	Express Messaging Access Code	.....
	Mail Express Timer	..... (sec.)
	Inter Digit Timer	..... (msec)
	Connection String (if Type=Other)	.....

	Setup data	Value
	Console Type	M2250 / CIU
	Prefix for External Number	.....
PBX	<u>ICI keys</u> (Incoming Call Indicator)  The ICI keys are defined in the PBX. To print the ICI keys: • Log into the PBX • Load the overlay 21 • Print the ATT block • Note the ICI keys configuration and assign a label for each key.  e.g.: .LOGI <UserId>↵ PASS ? <Password>↵ > LD 21↵ REQ: PRT↵ TYPE: ATT↵ TYPE ATT_DATA CUST 0↵  For more information, contact the PBX administrator	ICI 0 ..... Label ..... ICI 1 ..... Label ..... ICI 2 ..... Label ..... ICI 3 ..... Label ..... ICI 4 ..... Label ..... ICI 5 ..... Label ..... ICI 6 ..... Label ..... ICI 7 ..... Label ..... ICI 8 ..... Label ..... ICI 9 ..... Label ..... If used : ICI 10 ..... Label ..... ICI 11 ..... Label ..... ICI 12 ..... Label ..... ICI 13 ..... Label ..... ICI 14 ..... Label ..... ICI 15 ..... Label ..... ICI 16 ..... Label ..... ICI 17 ..... Label ..... ICI 18 ..... Label ..... ICI 19 ..... Label .....
	<u>FTR keys</u> (Feature keys)  The FTR keys are defined in the PBX. To print the FTR keys: • Log into the PBX • Load the overlay 22 • Print the TNB block • Note the FTR keys configuration and assign a label for each key.  e.g.: .LOGI <UserId>↵ PASS ? <Password>↵ > LD 22↵ REQ: PRT↵ TYPE: 2250↵ TN ↵ CUST 0↵ DATE ↵ PAGE ↵  For more information, contact the PBX administrator	FTR 0 ..... Label ..... FTR 1 ..... Label ..... FTR 2 ..... Label ..... FTR 3 ..... Label ..... FTR 4 ..... Label ..... FTR 5 ..... Label ..... FTR 6 ..... Label ..... FTR 7 ..... Label ..... FTR 8 ..... Label ..... FTR 9 ..... Label ..... If used : FTR 10 ..... Label ..... FTR 11 ..... Label ..... FTR 12 ..... Label ..... FTR 13 ..... Label ..... FTR 14 ..... Label ..... FTR 15 ..... Label ..... FTR 16 ..... Label ..... FTR 17 ..... Label ..... FTR 18 ..... Label ..... FTR 19 ..... Label .....

## 2.3 INSTALLATION

This chapter explains how to install the Smile application.

### 2.3.1 Overview



### 2.3.2 Preparing your system

- Connect the Sentinel SuperPro Dongle to the parallel port of the desktop.

In order to avoid any damage to the dongle we recommend you to shutdown the PC before connecting it.

- Connect the console (M2250/CIU) data port to the serial port of the operator desktop.

You will need a null-modem cable (DB25M-DB9F) for the M2250 and a special cable (Ref.: NTxDyyyy) for the CIU. The Special CIU cable is part of the CIU package and is furnished by Nortel Networks.

- If you are using Windows 98 SE or Windows NT4 SP6a, install the corresponding DSClient.

The DSClient is used by the LDAP lookup and LDAP Update functions.

To install the DSClient component, you have to launch the DSClient.exe available on the Smile CD-ROM. Two versions of DSClient are available on the Smile CD:

- CDRom:\Dsclient\_98se\dsclient.exe (for Windows 98 SE)
- CDRom:\Dsclient\_NT4SP6a\dsclient.exe (for Windows NT4 SP6a)

Follow the on-line instructions and reboot the PC when prompted.

For more information, refer to Appendix D 'DSClient Installation'.

On a Windows 2000 Prof. or Windows XP Prof. workstation, the installation of the Smile package is completely automatic.

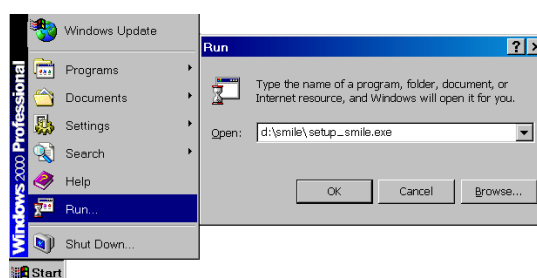
### 2.3.3 Installation details

When installing on Windows NT systems (Windows NT4, Windows 2000 Prof. and Windows XP Prof.), make sure that all steps are done with the same administrative account.

You are now ready to run the Smile setup program, during which all the necessary components (MDAC 2.6, Sentinel Driver, etc...) will be installed.

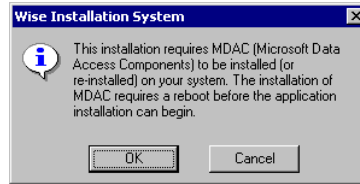
- Step 1: Starting the Installation

It is recommended to exit all the other Windows programs before starting the installation. Insert the Smile CD-ROM and start the Setup\_Smile.exe located in the Smile directory



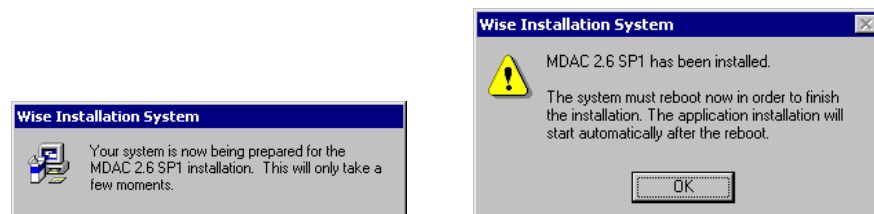
If needed, adapt the CD-ROM drive letter d: to match your PC configuration.

When the setup program starts, the following screen may be presented:



This means that the installation of Smile requires the installation of MDAC 2.6.

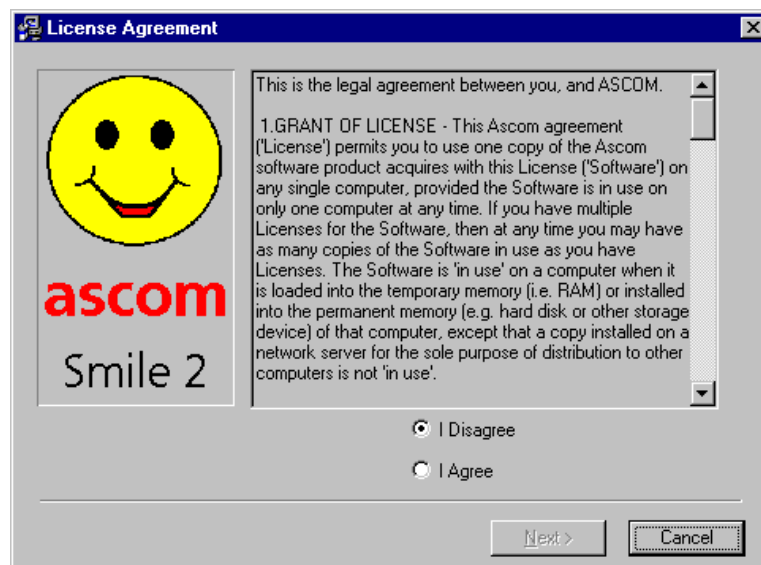
Click <OK> to proceed with the MDAC 2.6 installation.



Click <OK> to reboot.

After the reboot, the setup will resume automatically (you have to log into Windows with the same account as the one you used to start the installation).

- Step 2: The license agreement



Please read it carefully and select "I agree" to accept the license agreement.

Click <Next> to continue.

- Step 3: The Welcome message appears



Click <Next> to continue.

- Step 4: Choose the directory where you want to install the Smile program

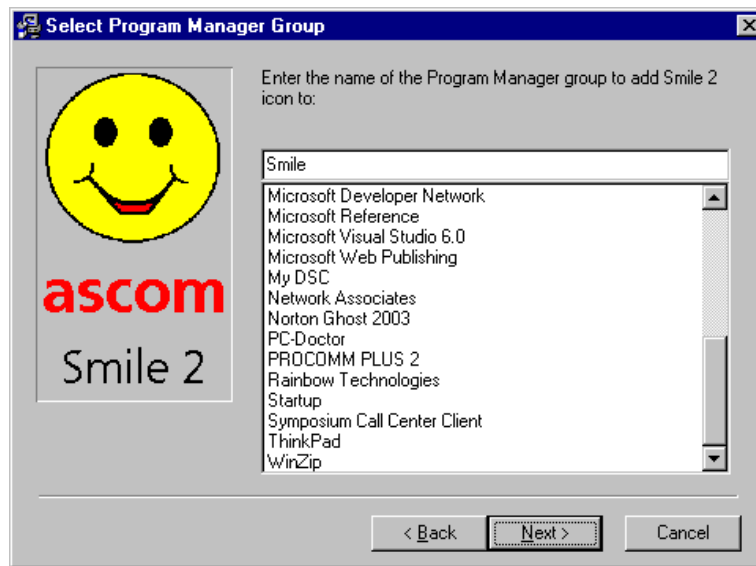


By default the program will be installed in 'C:\Program Files\Smile'.

Click on the <Browse> button if you want to install it in another folder. Refer to the required setup data table in chapter '2.2 Required Setup Data'.

Click <Next> to continue.

- Step 5: Specify the program group where you want to add the Smile icon.



By default it will create a new group called 'Smile'.  
If you want, you can select an existing folder or create a new one by entering the name of the new program group.

Click <Next> to proceed with the installation.

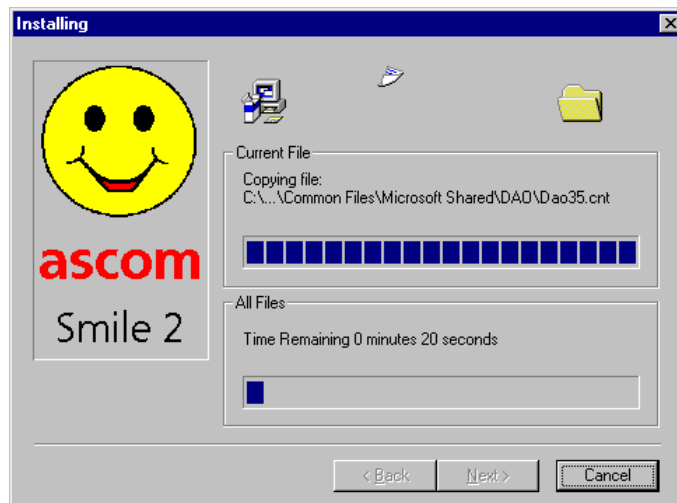
- Step 6: The installation program has now collected all the necessary information and is ready to start



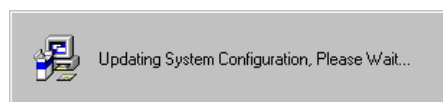
Click <Next> to continue.



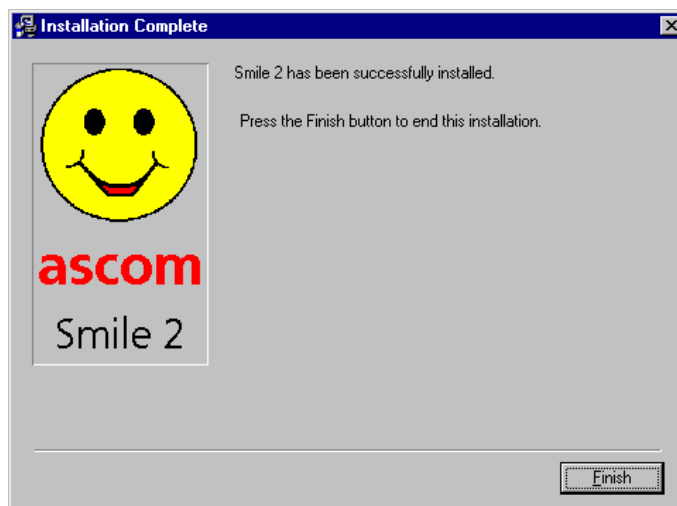
All the files are now copied to the hard disk.



and the installation process update the system configuration.



- Step 7: At the end of the installation you will see the following dialog box



The Smile program has been successfully installed on your computer.

Click <Finish> to complete the installation.

If you are performing the upgrade of a previous Smile software version, please jump to chapter '2.5 Upgrade'.

Otherwise, the next step is the configuration of your Smile software. Go to the next chapter '2.4 Configuration'

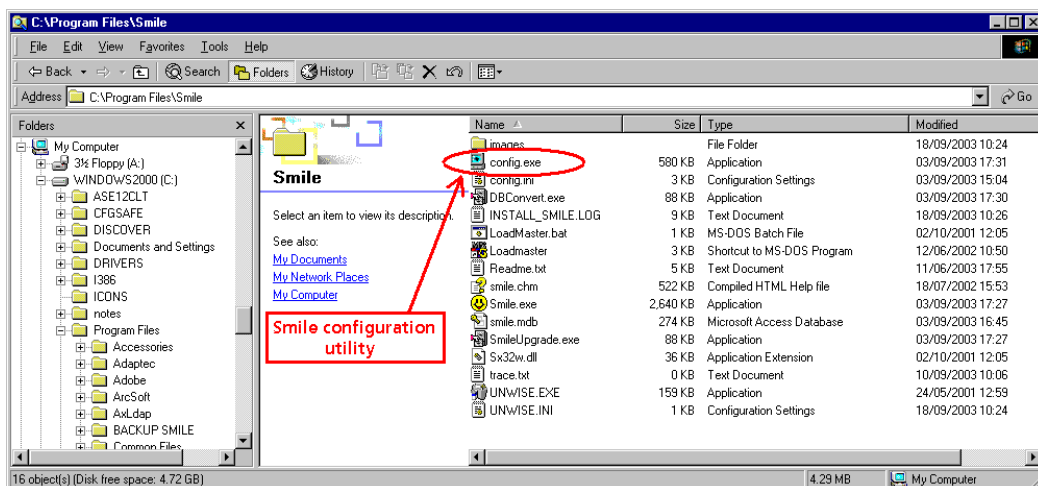
## 2.4 CONFIGURATION

Now that Smile has been installed on your computer, it must be configured. This is done with the Smile configuration utility (CONFIG.EXE) that can be found in the Smile application directory (Default: C:\Program Files\Smile).

The configuration part of the Networking, LDAP Update and Emails features will only be displayed if you have the appropriate license. Specific chapters will treat the installation and the configuration:

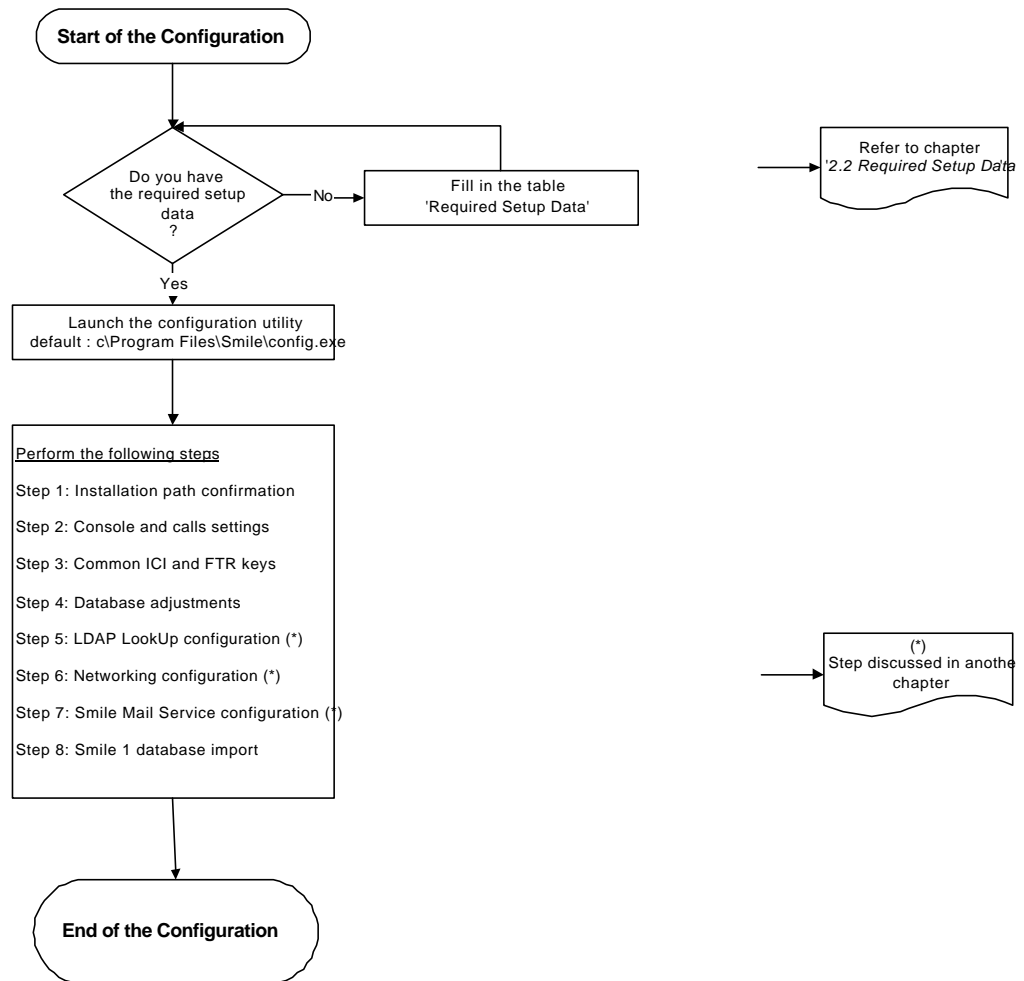
- Chapter 4 - Networking
- Chapter 5 - LDAP
- Chapter 6 – Emails

Don't forget to close the Smile application before starting the configuration tool (to avoid some discrepancies).



Note that this configuration utility will be started automatically the first time you launch the Smile.

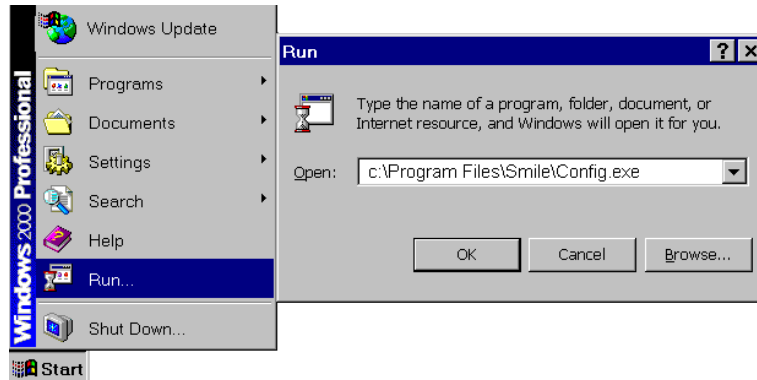
## 2.4.1 Overview



## 2.4.2 Configuration details

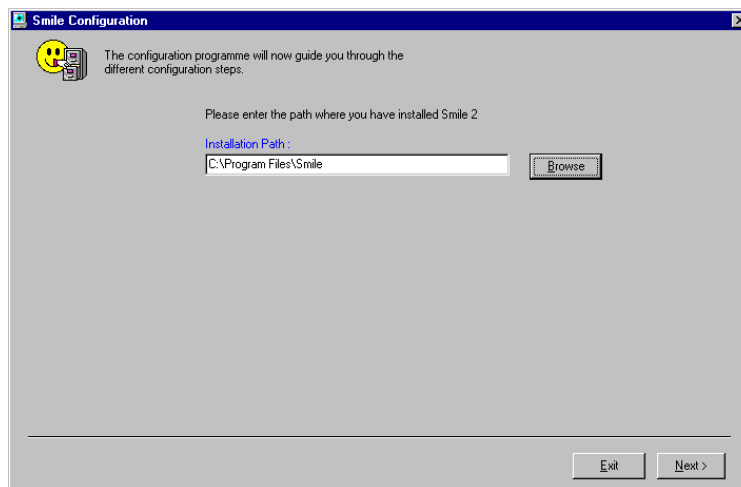
- Step 1: Starting the Smile configuration utility

Launch the config.exe file located in the Smile application directory



The default Smile application path is 'c:\Program Files\Smile'. Do not hesitate to adapt it to correspond to your PC configuration.

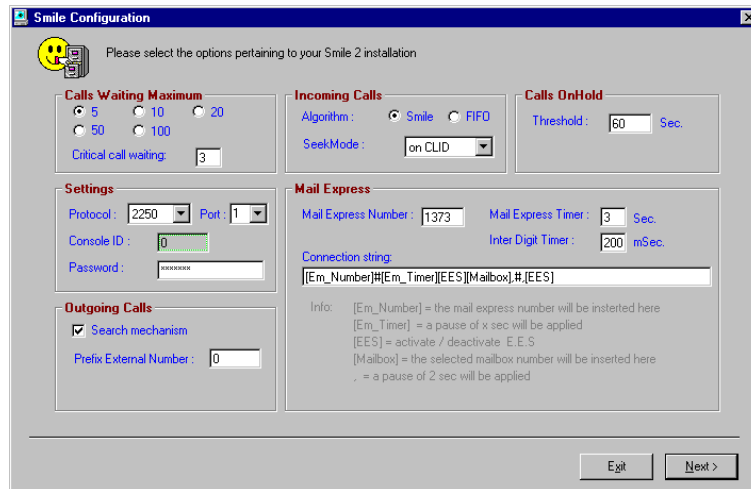
- Step 2: Installation path confirmation



First of all you have to specify the directory where Smile was installed.

Click <Next> to continue.

- Step 3: Console and call settings



Call Maximum Waiting: determines how the thermometer of the current call area will look like: it's the maximum value of this thermometer.

Critical call waiting: used to determine when the colour of the thermometer has to be changed (blue/red).

#### Settings:

Protocol: specify the type of console that Smile is connected to

Port: serial communication port.

Console ID: ID of the console. If you are installing more than one console in a networked environment (with the Smile Network feature), you have to pay attention that every console has its own unique ID.

Password: In this field you have to enter the password that the administrator will use to have access to some extra configuration options in the Smile application.

#### Outgoing calls

Search mechanism: allows you to put the search mechanism in or out of service for the outgoing calls (calls made by the operator).

Prefix External Number: this is the Access Code that Smile has to dial before calling an external or mobile number.

#### Incoming calls (See also Appendix C)

Algorithm: specifies which algorithm will be used by the application.

SeekMode: determines the incoming calls search mechanism

#### Calls on hold

Threshold: If this threshold is exceeded, the wait time of the call on hold is turned in red.

#### Mail Express

Mail Express Number: DN of the Express Messaging service of your voice mail system.

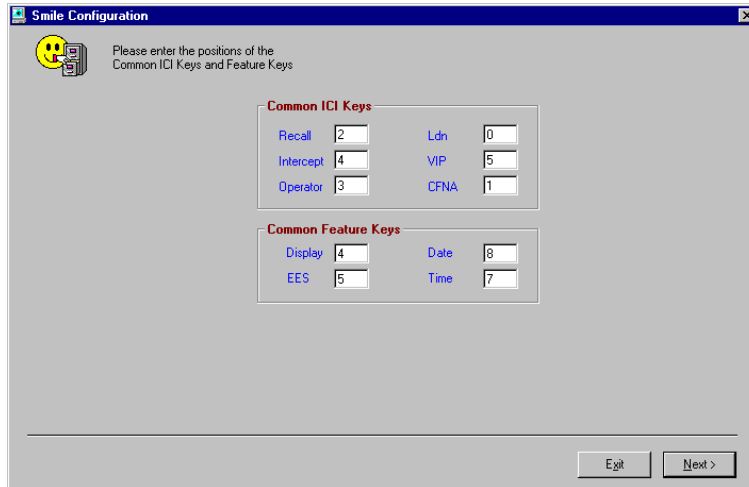
Mail Express Timer: it is the time that the Smile application waits before sending out the mailbox number. In this time interval the Express Messaging system will have the time to hook off.

Inter Digit Timer: duration of the pause made between the digits of the Mail Express Number and Mailbox number specified in the connection string.

Connection string: determines how the Smile will interact with the voice mail system.

Click <Next> to continue.

- Step 4: Common ICI and FTR keys



Smile Configuration

Please enter the positions of the Common ICI Keys and Feature Keys

**Common ICI Keys**

Recall	2	Ldn	0
Intercept	4	VIP	5
Operator	3	CFNA	1

**Common Feature Keys**

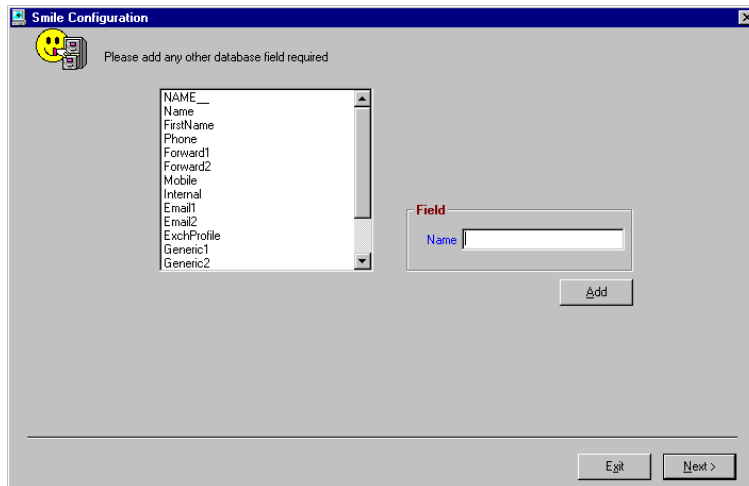
Display	4	Date	8
EES	5	Time	7

Exit Next >

Now you have to enter the positions of the Common ICI Keys and of the Common Feature Keys that are used by Smile. If one of the keys has not been defined on your system, you have to enter a "-" (minus sign).

Click <Next> to continue.

- Step 5: Database fields



Smile Configuration

Please add any other database field required

NAME__
Name
FirstName
Phone
Forward1
Forward2
Mobile
Internal
Email1
Email2
ExchProfile
Generic1
Generic2

**Field**

Name:

Add

Exit Next >

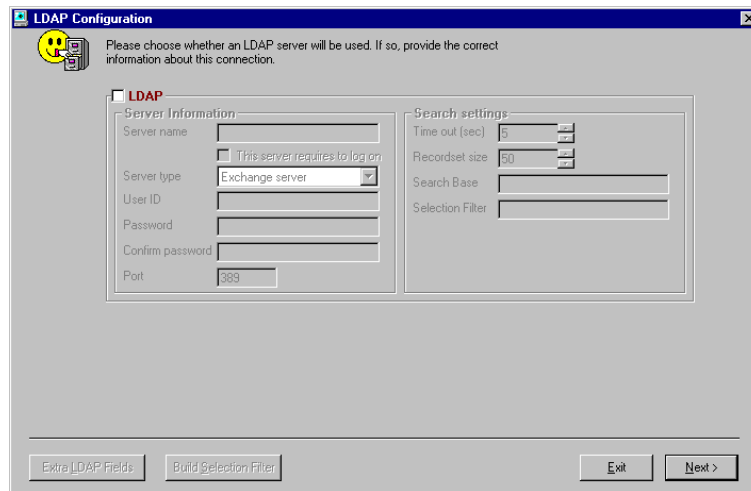
If you want, you can add a new field to the Smile database. To add a new field, you have to enter the name of the new field in the Name-field and click Add. You see your new field appearing in the left column.

Note that there are forbidden words (SQL reserved words) like: Authorization, Date, Index, Identity, Group, Domain, Descriptor, Language, Level, Local, National, Position, Privileges, Section, Time, etc...

The complete list of 'SQL Reserved Words' is available on Internet.

Click <Next> to continue.

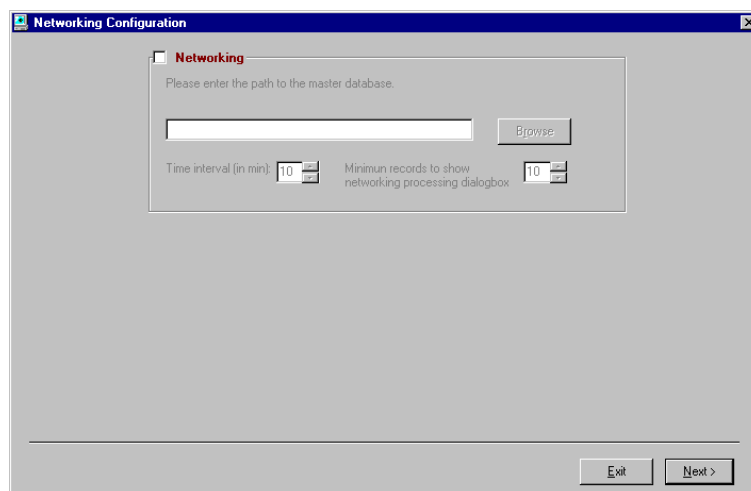
- Step 6: LDAP LookUp configuration



This configuration step will be discussed in detail in chapter '5 LDAP'

Click <Next> to continue.

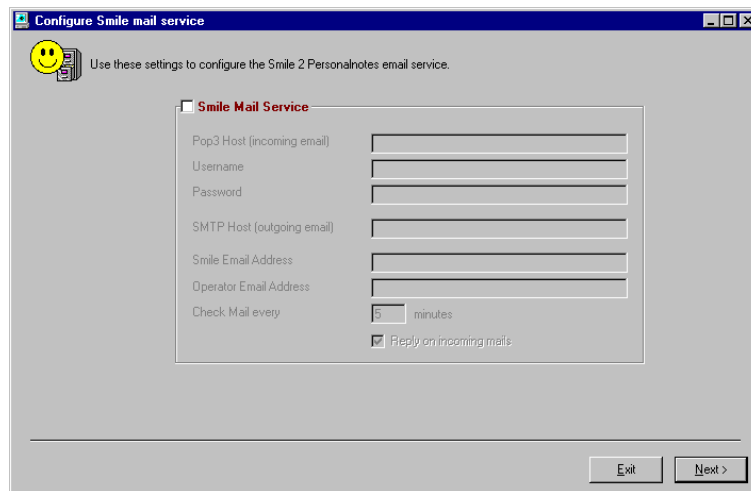
- Step 7: Networking configuration (Advanced package)



This configuration step will be discussed in detail in chapter '4 Network Facility'

Click <Next> to continue.

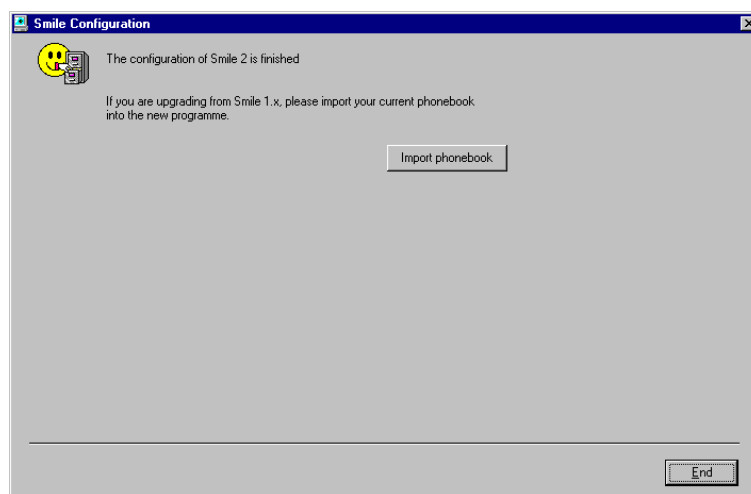
- Step 8: Smile Mail Service configuration (Premium package)



This configuration step will be discussed in detail in chapter '6 E-mails'

Click <Next> to continue.

- Step 9: Smile 1 database import

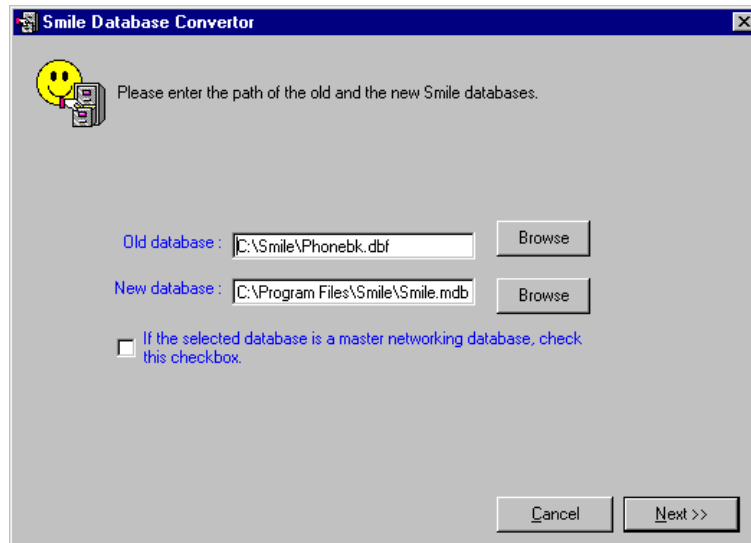


If you want to import your old phone book from Smile 1.x, you can do it now by clicking on the <Import Phonebook> button. See Step 9.1

Or click <End> to complete the configuration.



- Step 9.1: Smile 1 database import – Databases locations

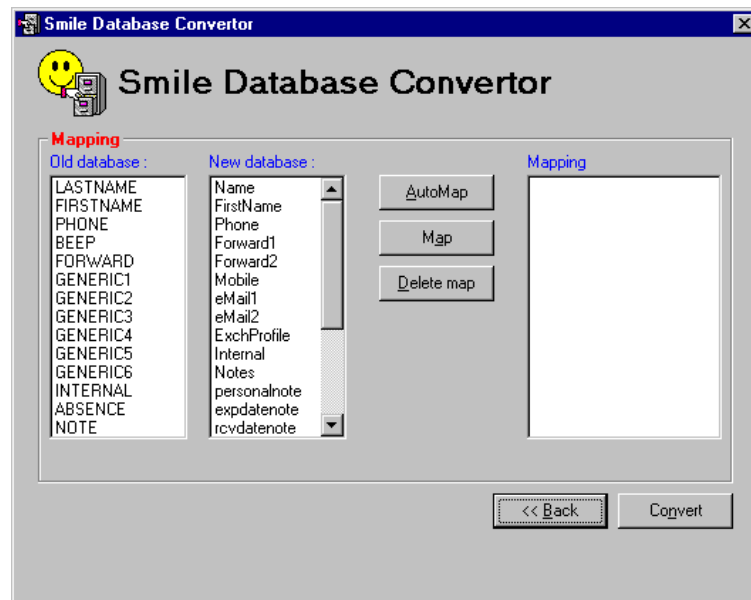


First, you have to enter the directory where the Smile 1.x (Old database) and the Smile 2.x (New database) databases are located. If the new database is the master database of your network, then you have to check the corresponding checkbox.

Click <Next> to continue.

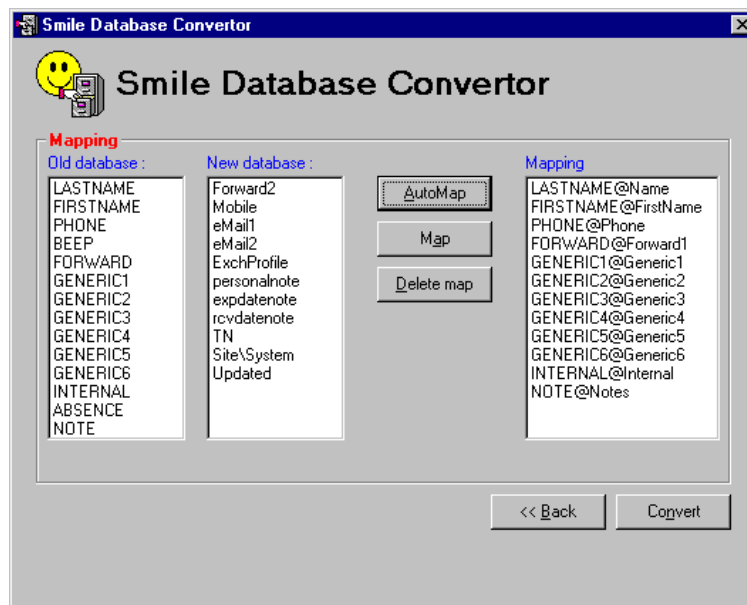
- Step 9.2: Smile 1 database import – Fields mapping

You get the possibility to map the fields of the old database with the fields of the new database.



You select a field from the old database and you select the corresponding field from the new database. To validate the mapping, you click <Map>. The selected field from the new database will be removed from the list. If you want to remove one of the mappings, you select it from the list and you click <Delete map>.

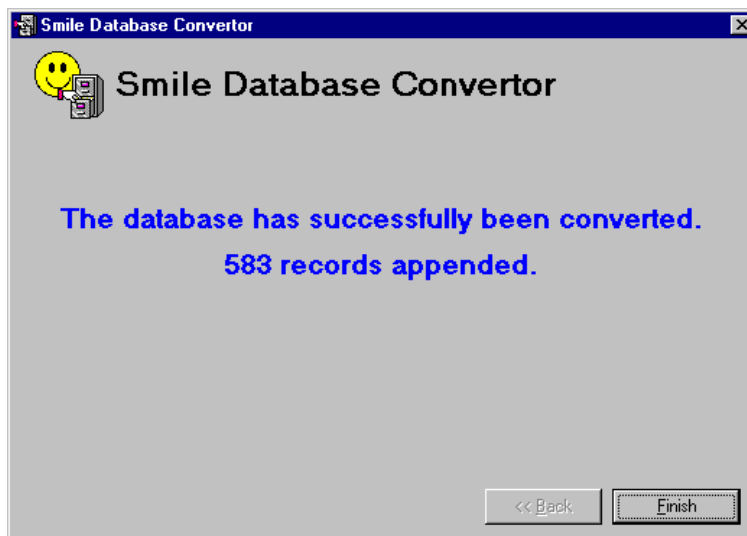
The <AutoMap> button will allow you to map automatically all the fields with the same name.



Click <Convert> to launch the conversion process.

If there are many entries in the database, this can take some time.

- Step 9.3: Smile 1 database import - Result



The database has now been converted successfully.

Click <Finish> to continue.

- Step 9.4: At the end of the import you will return to the following dialog box



Click <End> to complete the configuration.

The configuration is saved in a file called 'config.ini' located in the Smile application directory. You can open it with a notepad but we do not recommend you to change it.

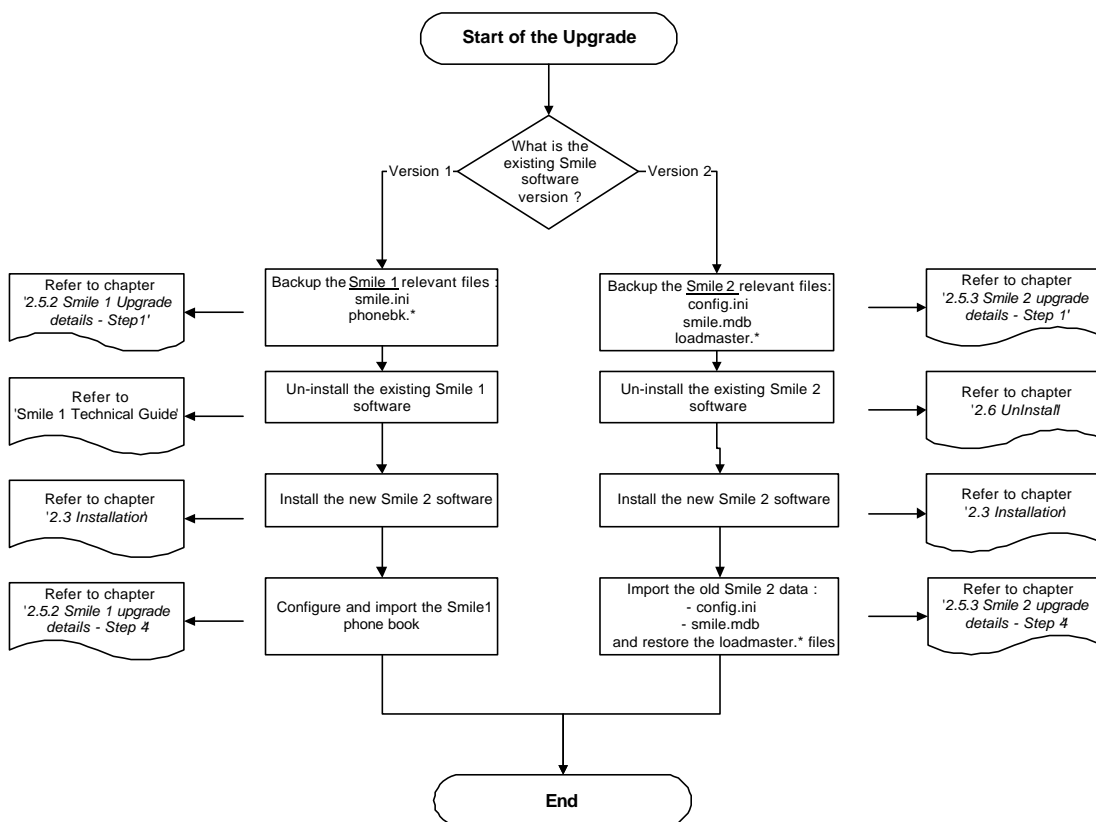
## 2.5 UPGRADE

This chapter explains how to upgrade an existing Smile system.

Depending on the existing Smile software release we will have to choose one of the two scenarios:

- Upgrade from Smile 1 to Smile 2
- Upgrade from a previous Smile 2 to the latest Smile 2 version

### 2.5.1 Overview



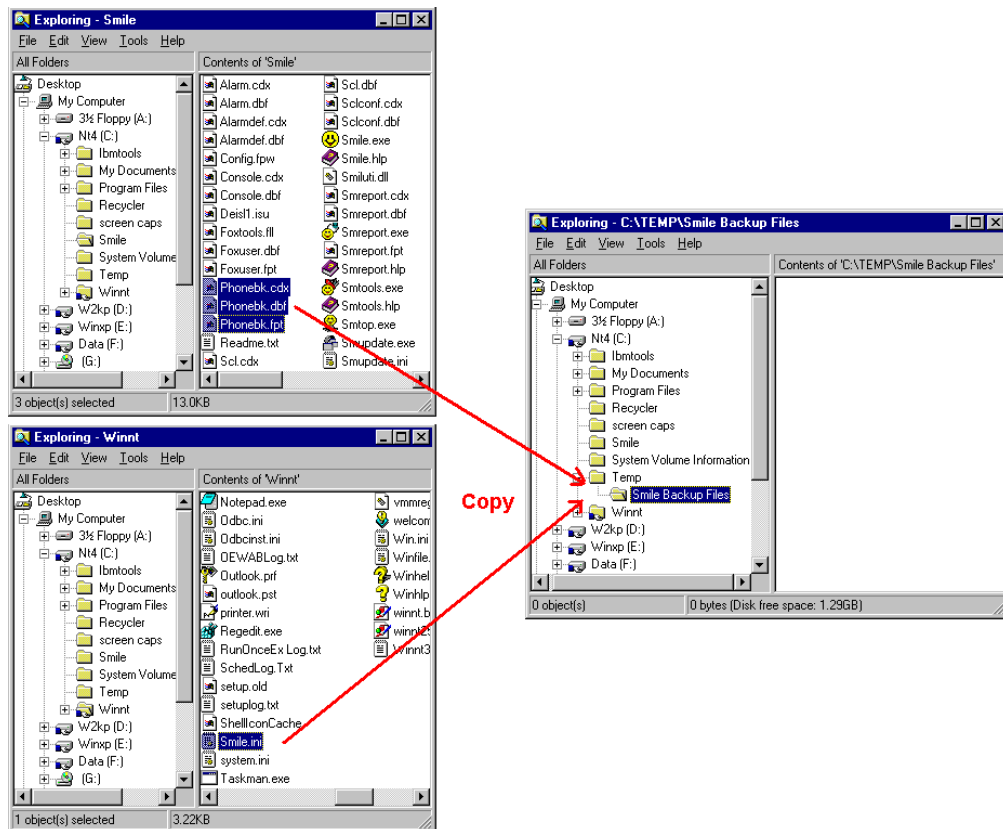
## 2.5.2 Smile 1 upgrade details

- Step 1: Backup the existing Smile 1 data files

The relevant data files are:

- smile.ini used to store the Smile 1 configuration parameters (file location: c:\winnt or c:\windows)
- phonebk.dbf +
- phonebk.cdx + Phone book (files location: c:\smile)
- phonebk.ftp +

We recommend you to create a new directory (e.g.: C:\Temp\Smile Backup Files) and to save a copy of the four existing data files in it. We will need them in a later stage.



- Step 2: Uninstall the existing Smile 1 software

Refer to the 'Smile 1 Technical Guide'

- Step 3: Install the new Smile 2 software version

Refer to chapter '2.3 Installation'

- Step 4: Configure Smile 2 and Import the Smile 1 Phone book

The table below will help you to match the 'Required setup data' of the Smile 2 (refer to chapter '2.2 Required Setup Data') with the data found in the Smile 1 initialisation file (Smile.ini).

	Smile 2.x.y Setup data	Smile 1 corresponding setup data. (smile.ini)
Smile Application	Special fields to add to the Smile database	Cf section [DataBaseVariables]
	Console ID	[Console] ID
	COM port number (Default : 1)	[Console] Port
	Incoming Calls Algorithm	[Miscellaneous] OnHookAlgo
	SeekMode	[Console] SeekMode
PBX	Console Type	[Console] Type
	Prefix for External Number	[Phone] AccessCode
	ICI keys (Incoming Call Indicator)	[ICIKeys] ICI(0..9)=0..9,Label, Recall Intercept Operator LDN CFNA VIP
	FTR keys (Feature keys)	[FeatKeys] FTR(0..19)=0..9,0..9,Label, Display Date Time

Refer to chapter '2.4 Configuration' to configure the Smile 2, the import of the Smile 1 phone book is explained in step 9.

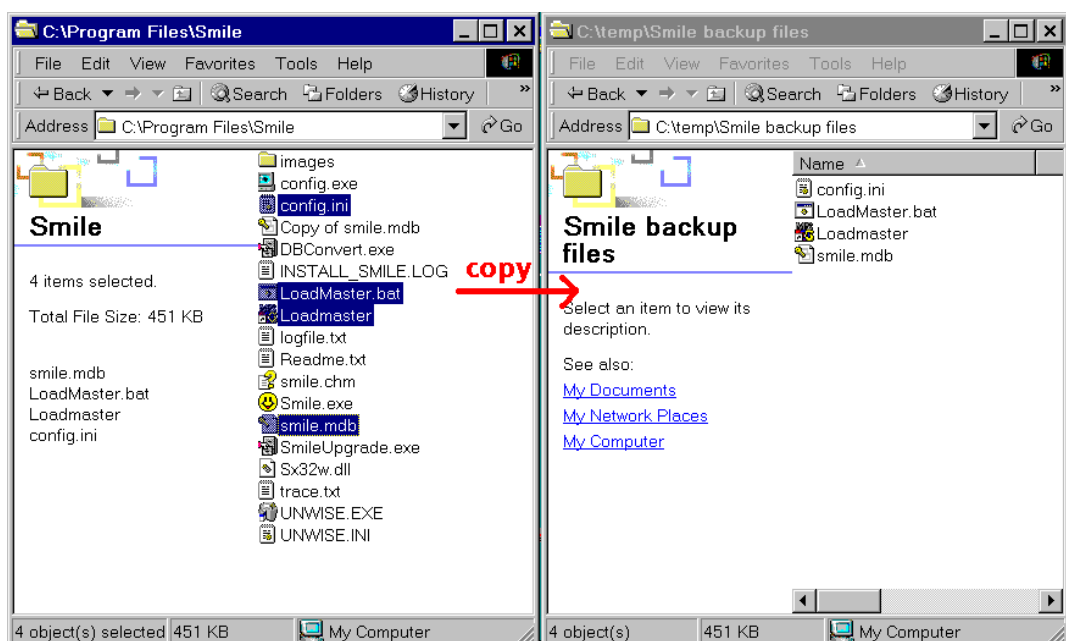
### 2.5.3 Smile 2 upgrade details

- Step 1: Backup the existing data files

The relevant data files are:

- Config.ini used to store the Smile configuration parameters
- Smile.mdb contains the phone book, the language and LDAP definitions
- Loadmaster.bat used for special startup and midnight routine options
- Loadmaster.pif Shortcut to Loadmaster.bat

We recommend you to create a new directory (e.g.: C:\Temp\Smile Backup Files) and to save a copy of the four existing data files in it. We will need them in a later stage.



- Step 2: Uninstall the existing smile 2 software

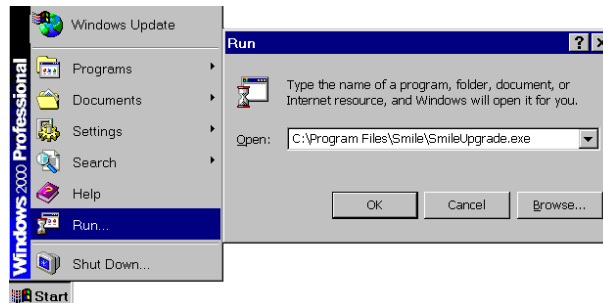
Refer to chapter '2.6 Uninstall'

- Step 3: Install the new Smile 2 software version

Refer to chapter '2.3 Installation'

- Step 4: Import the old Smile 2 data
- Step 4.1: Import the old Smile 2 data - Starting the Smile Upgrade tool

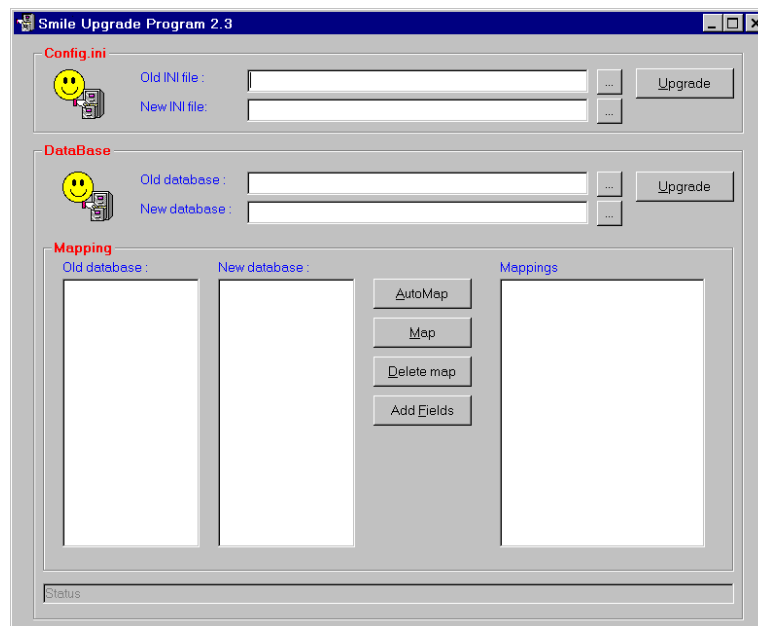
Launch the SmileUpgrade.exe file located in the Smile application directory




The default Smile application path is 'C:\Program Files\Smile'. Do not hesitate to adapt it to match your PC configuration.

The Smile Upgrade tool window appears

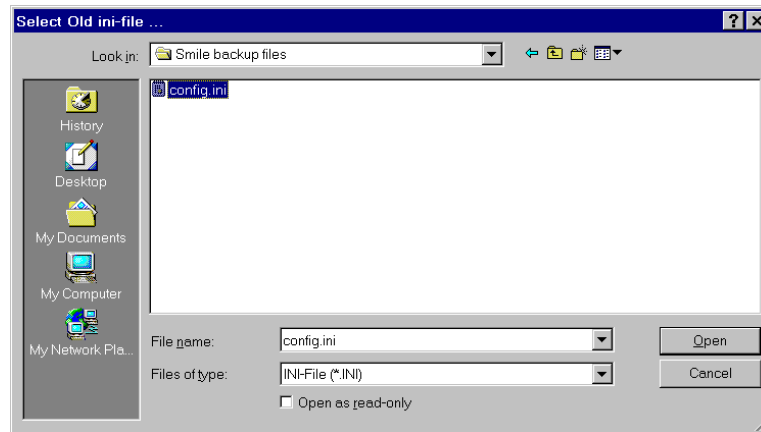
- Step 4.2: Import the old Smile 2 data - Data files location specification





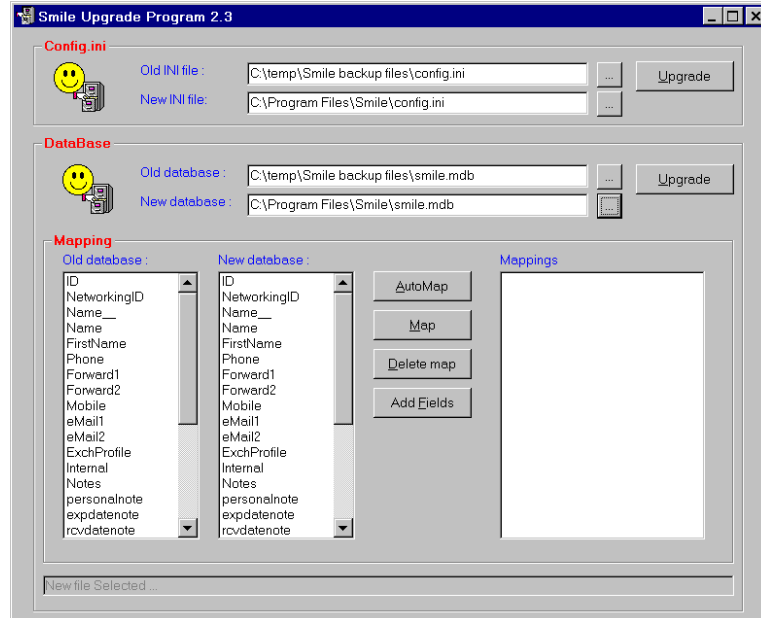
Use the browse buttons  to specify the files location of the:

- old configuration file (e.g.: c:\temp\Smile backup file\config.ini)
- new configuration file (e.g.: c:\Program Files\Smile\config.ini)
- old database (e.g.: c:\temp\Smile backup file\smile.mdb)
- new database (e.g.: c:\Program Files\Smile\config.ini)



- Step 4.3: Import the old Smile 2 data - Database Fields mapping

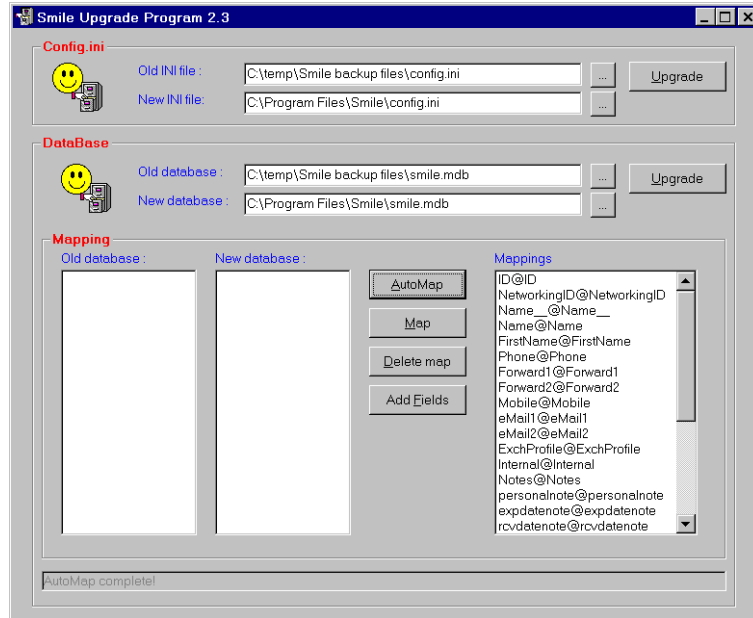
After you have filled in the two database locations, the Smile Upgrade tool will show you in the Mapping area the fields available in both databases.



You will have to map the old database fields onto the new database fields by selecting the corresponding fields and by clicking on **<Map>**. Perform this step for each field you want to import. To delete a mapping you will use the **<Delete map>** button and the **<AutoMap>** button will allow you to map automatically all the fields with the same name. If the old database contains some customer specific fields you will use the **<Add Fields>** button to add them into the new database.

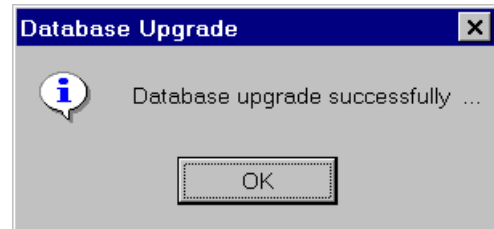
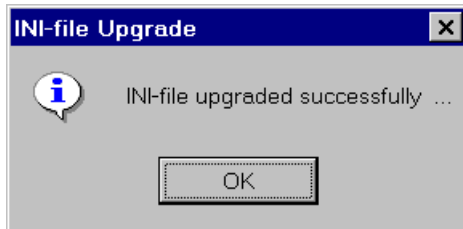
- Step 4.4: Import the old Smile 2 data - Upgrade the configuration file

Once the mapping between the old and the new fields is defined we can proceed with the Upgrade by clicking on the two upgrade buttons: one for the configuration file (config.ini) and one for the database (smile.mdb)



- Step 4.5: Import the old Smile 2 data - Import completed

You will get the following upgrade confirmation messages:

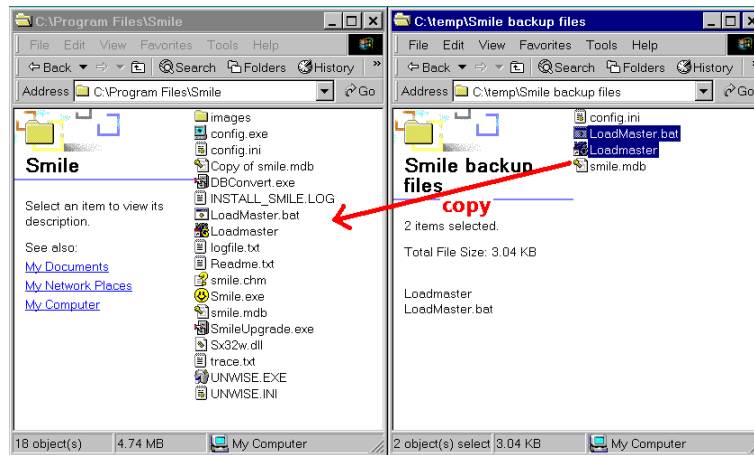


Just click on <OK> button to close the message boxes.

Click on the button to close the Smile Upgrade tool.

- Step 4.6: Import the old Smile 2 data - Restore the LoadMaster.\* files

Overwrite the existing Loadmaster.\* files with the one saved previously.



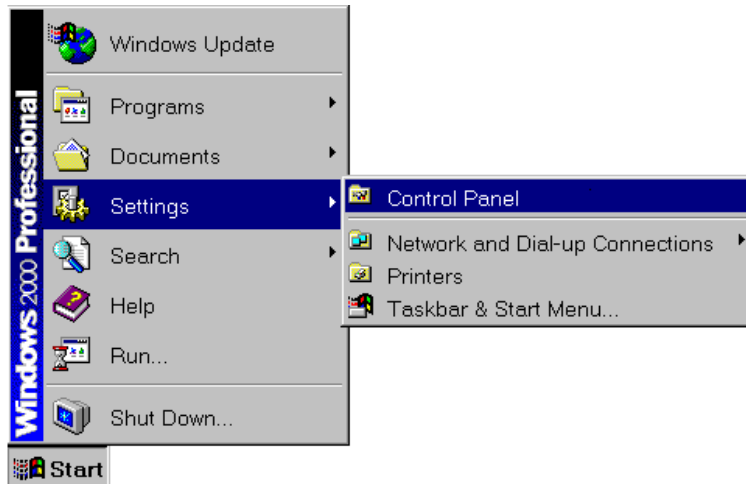
- Step 5: Import the old Smile 2 data - Review your software configuration with the configuration utility

Refer to chapter '2.4.2 Configuration details'.

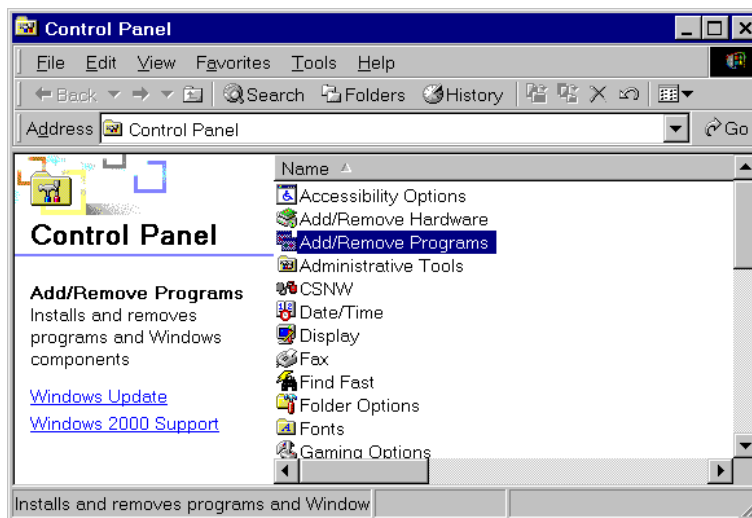
## 2.6 UNINSTALL

- Step 1: Open the Control Panel

When installing on Windows NT systems (Windows NT4, Windows 2000 Prof. and Windows XP Prof.), make sure that all steps are done with an administrative account.

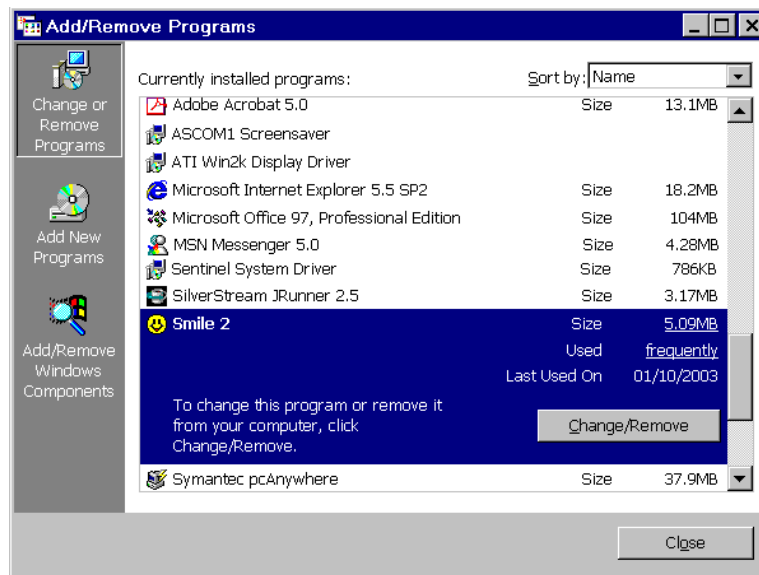


- Step 2: Select the option 'Add/Remove Programs'



Double click on the item 'Add/Remove Programs'

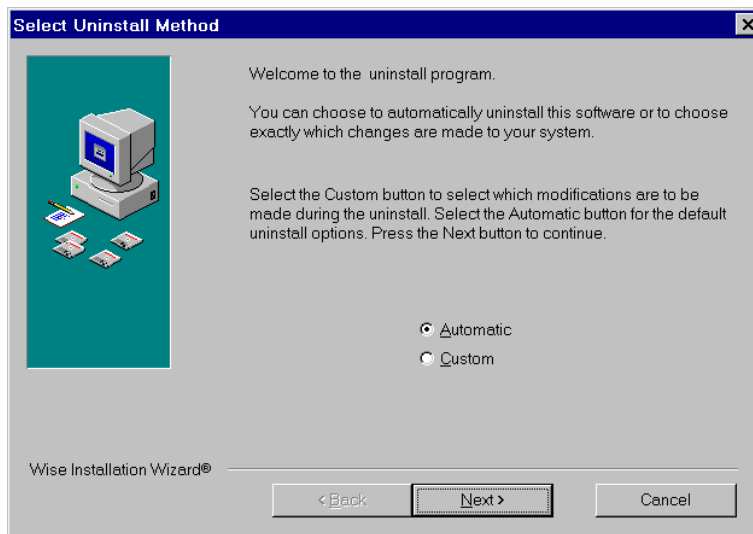
- Step 3: Select the Smile 2 program



Select the Smile 2 program.

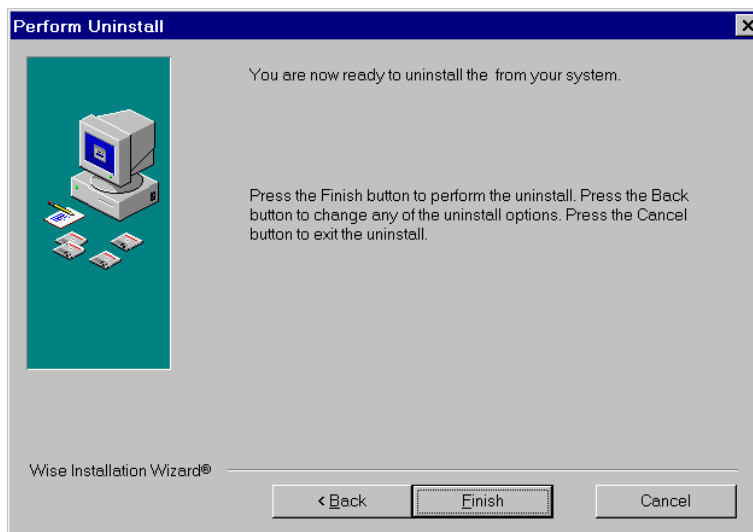
Click on the <Change/Remove> button to continue.

- Step 4: Select the Uninstall Method



Select the Automatic uninstall method and click on the <Next> button to continue.

- Step 5: Confirm the uninstall

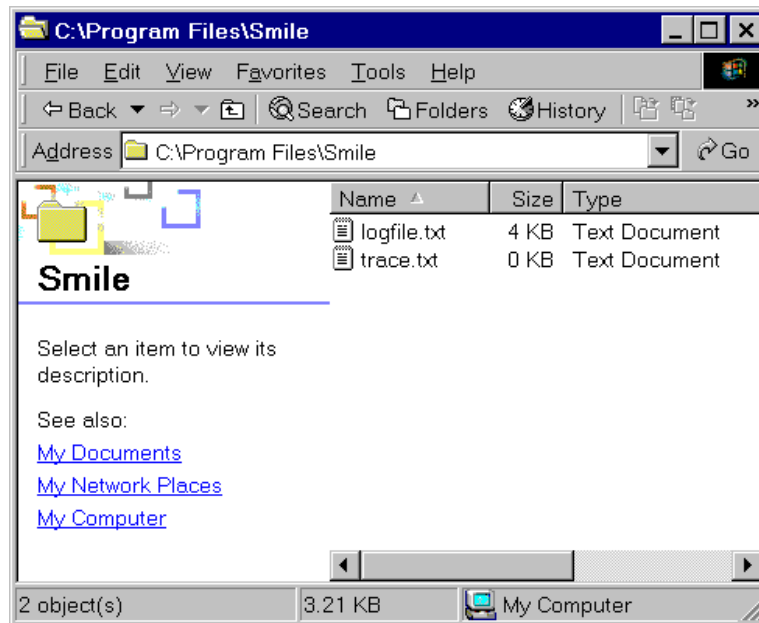


Click on the <Finish> button to start the uninstall.

- Step 6: Close the Add/Remove Program window

Click <Close> to close the Add/Remove Program window then close the Control Panel

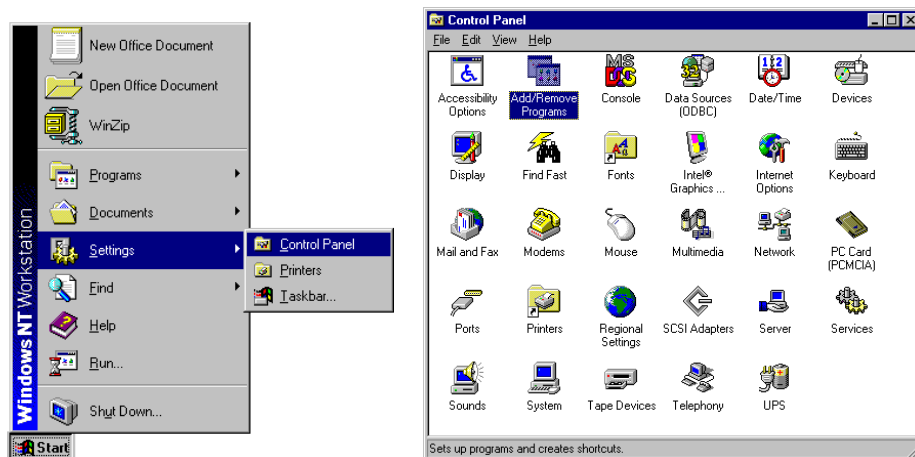
- Step 7: Delete the Smile Directory



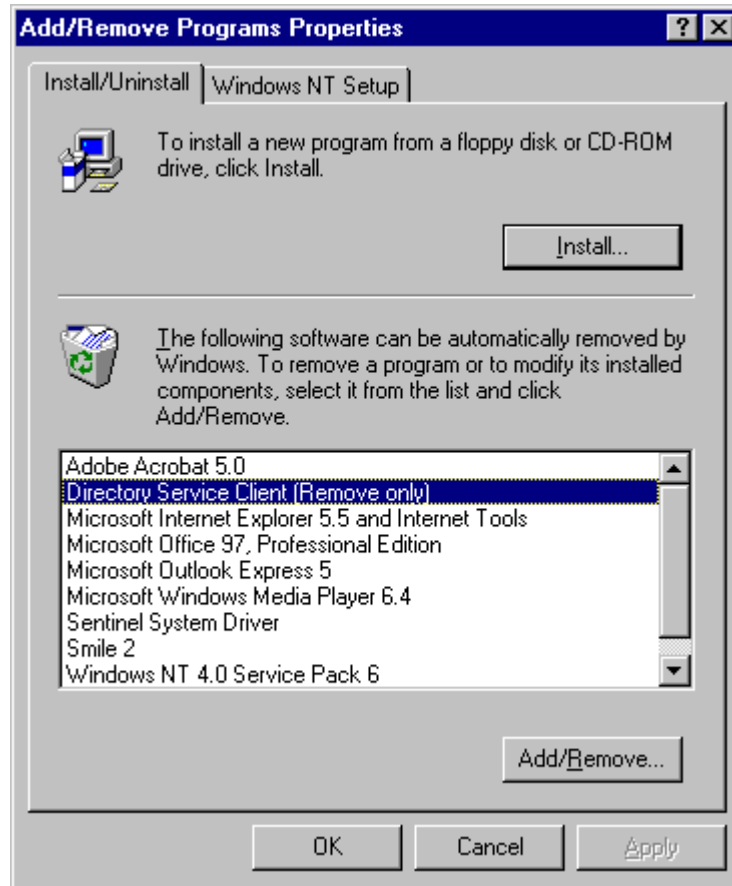
- Step 8: Uninstall the DSCClient

If you are running MS Windows 98 SE or MS Windows NT4 SP6a, you have to remove the DSCClient.

Open the control panel and click on the icon Add/Remove Programs



Select the item 'Directory Service Client (Remove only)' and click on <Add/Remove>



Then click on the <OK> button and close the Control panel.

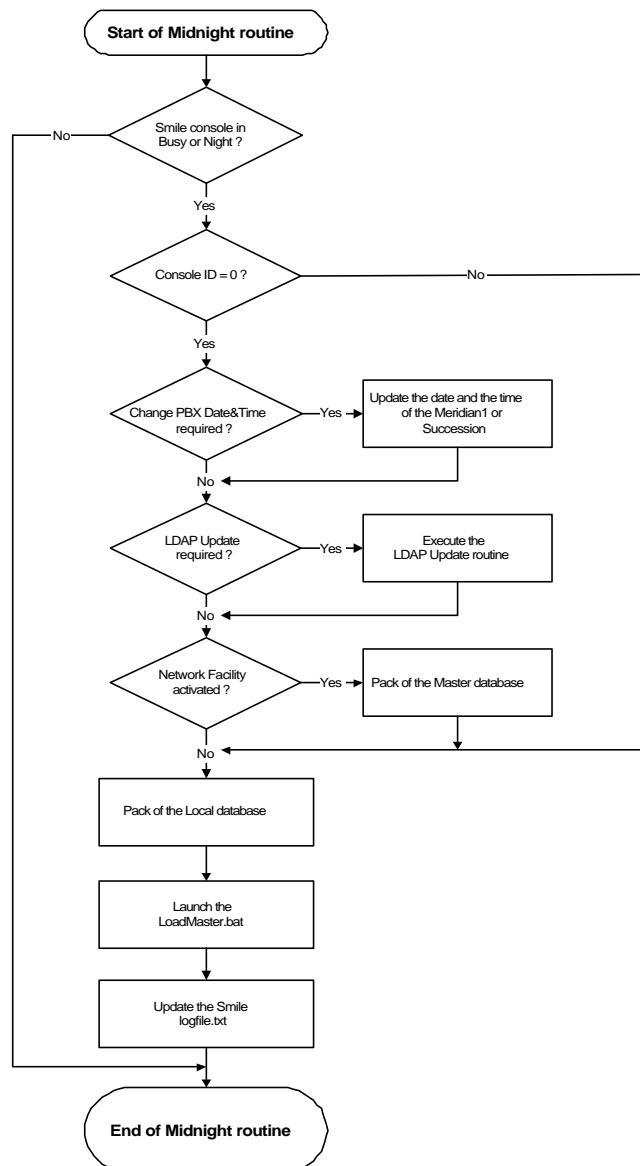
The DSClient uninstall is completed.



## 2.7 THE SMILE MIDNIGHT ROUTINE

During the midnight routine, Smile is going to perform some operations:

- If the option "Change PBX Date/Time" has been checked, then the Master Smile console (Console ID = 0) will update the date and time of the Meridian 1 with the date and time defined on the PC.
- During the configuration of the LDAP Update (in the Smile configuration utility) you have the choice to include the LDAP Update process in the midnight routine. If you checked the appropriate checkbox, then the LDAP Update will be executed during the midnight routine.
- The local databases will be packed: effectively deleting all the records marked for deletion. The Master Smile Console will also pack the Master database.
- Smile will automatically execute the LoadMaster batch-file that is located in the Smile application directory (Loadmaster.bat).

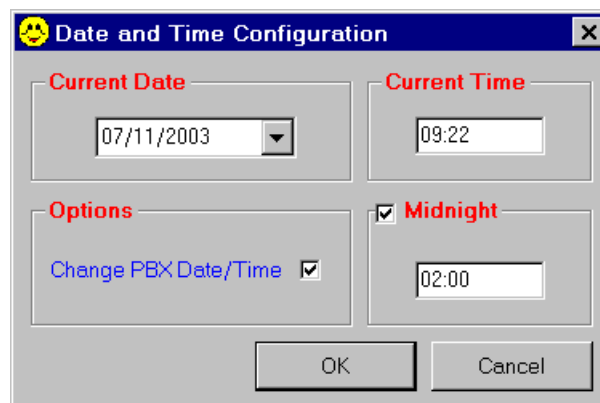


To activate and schedule the midnight routine, you have to select the Date & Time item from the Configuration menu of the Smile. This menu item is only accessible for the administrator.

When Midnight is checked, this PC will perform the midnight routine at the hour indicated below. If the checkbox 'Change PBX Date/Time' is crossed, then the midnight routine will automatically adjust the time and date of the PBX to the time and date of the PC.

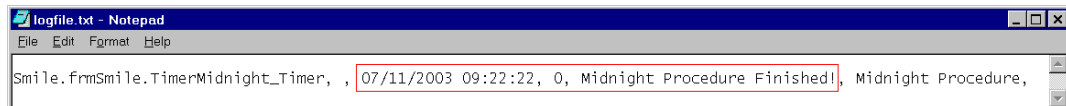
The Smile application will use the feature keys Time (MTM) and Date (MDT) to perform this task (refer to section '2.4.2 Configuration details Step4: Common ICI and FTR keys' to define them).

Clicking on the <OK> button will save the modifications; clicking on the <Cancel> will discard the changes.



The dialog box titled "Date and Time Configuration" has a yellow smiley icon in the title bar. It contains four main sections: "Current Date" with a dropdown menu showing "07/11/2003"; "Current Time" with a text box showing "09:22"; "Options" with a checkbox "Change PBX Date/Time" that is checked; and "Midnight" with a checked checkbox and a text box showing "02:00". At the bottom are "OK" and "Cancel" buttons.

At the end of the Midnight routine, the system will add an entry to the Smile log file (logfile.txt).

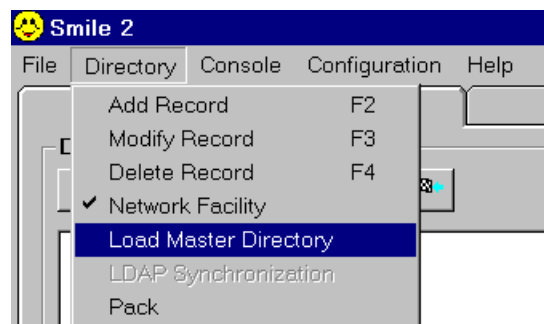


## 2.8 LOADMASTER DIRECTORY

The 'Load Master Directory' feature allows you to run a batch file called 'LoadMaster.bat' located in the Smile application directory.

This batch file will be executed:

- automatically every time that the Smile program is started
- at the end of the Midnight routine
- when the operator selects the 'LoadMaster Directory' item of the Directory menu



You can adapt this file to suit your needs for example to backup the Smile database and configuration files.

This is an example of the loadmaster.bat file:

```
LoadMaster.bat - Notepad
File Edit Format Help
REM This batchfile is run
REM - on Smile startup
REM - at the end of the Midnight routine
REM - when selecting 'Load Master Directory' from the Directory Menu.
REM
REM Adapt this batch file to suit your needs.
REM
REM EXAMPLE : Backup the Smile database
REM copy "c:\Program files\Smile\smile.mdb" \\BackupServer\Smile\
```

Before the introduction of the Network facility, the loadmaster.bat file was used to duplicate the Master Smile database to the other Smile workstations of the network.

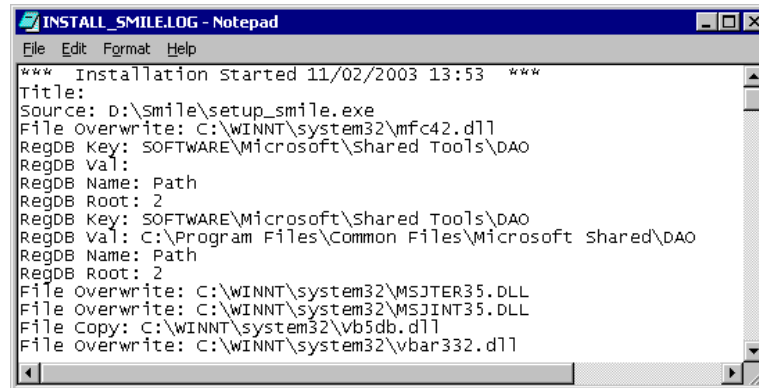


## 2.9 TROUBLESHOOTING

- Installation problem:

During the installation process, the Wise installer creates a log file called Install\_Smile.Log. It will help you to fix the problem.

Below is a sample installation log file:



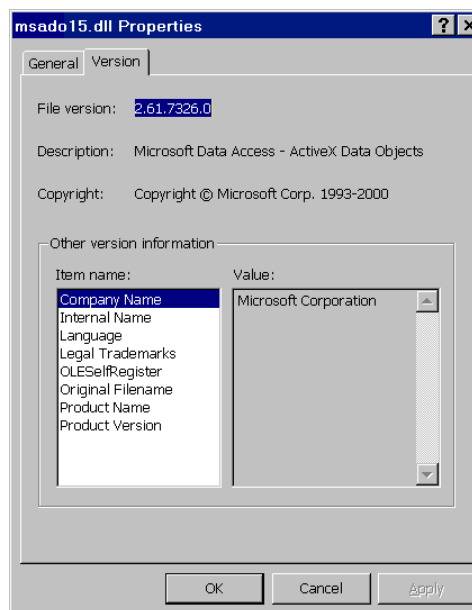
```

*** Installation Started 11/02/2003 13:53 ***
Title:
Source: d:\smile\setup_smile.exe
File Overwrite: C:\WINNT\system32\mfcd42.dll
RegDB Key: SOFTWARE\Microsoft\Shared Tools\DAO
RegDB Val:
RegDB Name: Path
RegDB Root: 2
RegDB Key: SOFTWARE\Microsoft\Shared Tools\DAO
RegDB Val: C:\Program Files\Common Files\Microsoft Shared\DAO
RegDB Name: Path
RegDB Root: 2
File Overwrite: C:\WINNT\system32\MSJTER35.DLL
File Overwrite: C:\WINNT\system32\MSJINT35.DLL
File Copy: C:\WINNT\system32\vb5db.dll
File Overwrite: C:\WINNT\system32\vbar332.dll
    
```

- Failed to open the Smile database:

The Smile 2 application uses the Microsoft Data Access Component (MDAC) to handle the database. The MDAC must be at least version 2.6. It is automatically installed during the Smile installation process.

To verify the MDAC version installed on your system, consult the property page of the file msado15.dll. The Search utility of Windows will help you to locate the file.

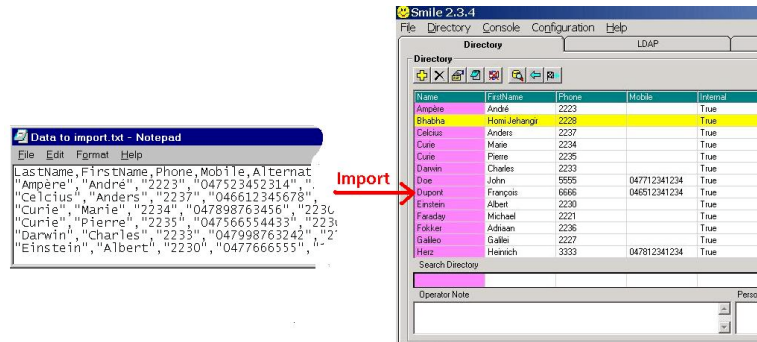


- Use of logfile.txt
- Serial port not properly defined

## 3 SmUpdate

### 3.1 INTRODUCTION

To extend the connection of Smile with other software a utility called SmUpdate is provided. It allows the import of data from a text file into the Smile phone book.



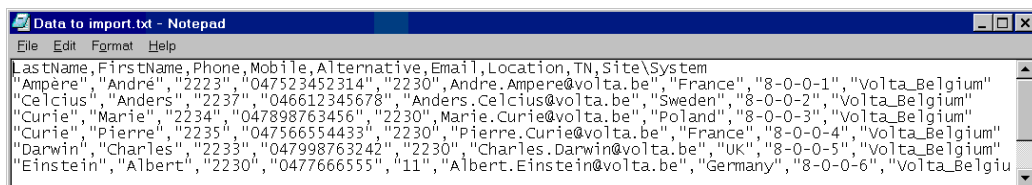
This tool is primarily designed to import the Corporate Directory generated by the Optivity Telephony Manager (OTM), but you may use it to import other files as well.

SmUpdate is available in all Smile packages. It does not check the presence of the Smile dongle to run.

The text file also called Source file will meet the following requirements:

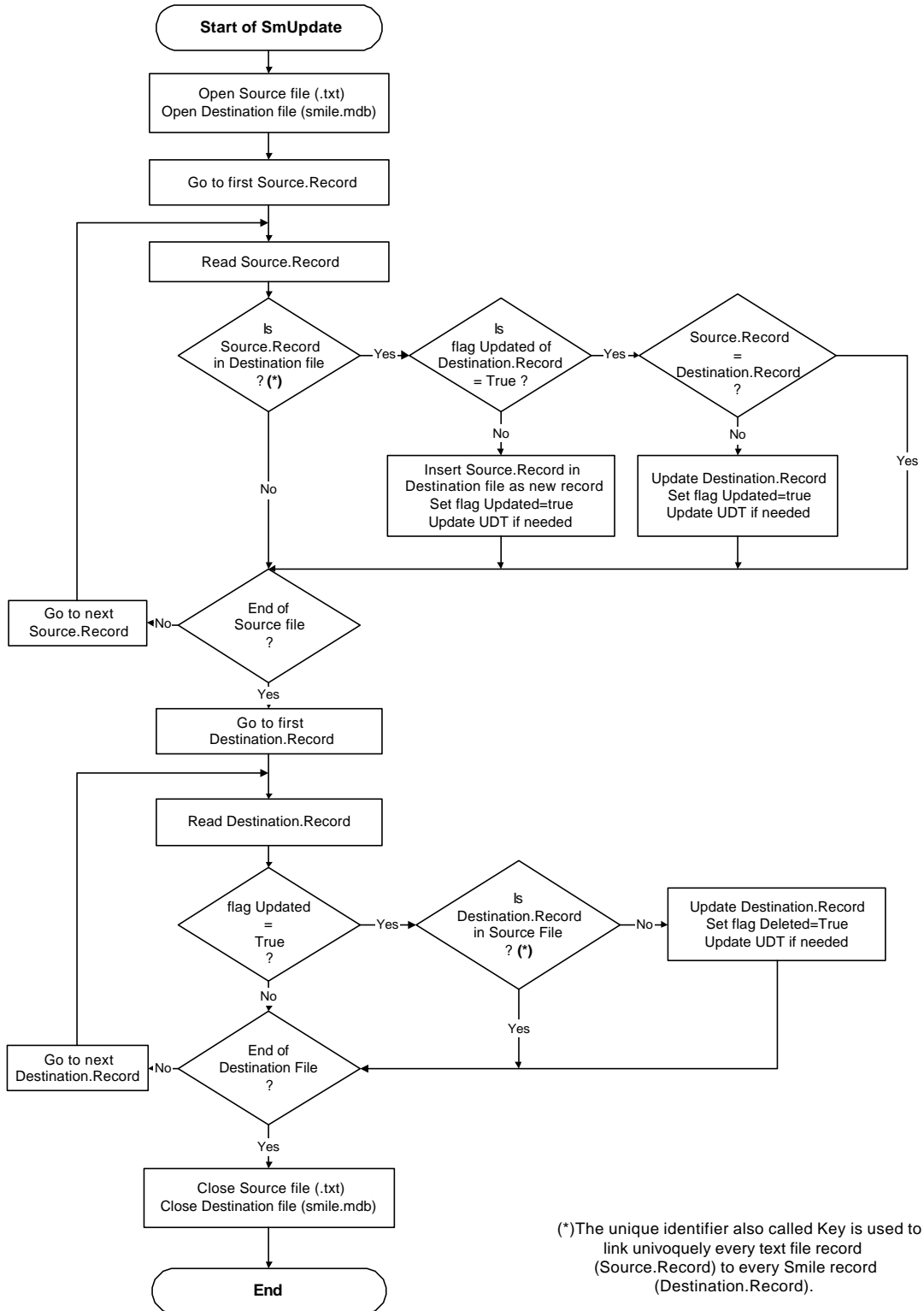
- The file format can be
  - delimited text file.
    - Each fields is enclosed by quotation marks ("" ) and there is a comma ( , ) between each field
  - list separator text file.
    - Each field is separated by a semicolon ( ; ).
- The first line contains the column headings
- LastName, FirstName and Phone fields are mandatory
- The field values can be placed between double quotes

Below is a sample of source file:



SmUpdate updates only the fields specified in your source file. The information stored in the other fields is maintained. If a record imported previously with SmUpdate (flag Updated set to true) is not in the source file, it will be automatically flagged as deleted by SmUpdate. This record will not be displayed on the operator interface anymore. The next Pack request will delete definitely the record from the Smile database.

### 3.2 SMUPDATE FLOW CHART



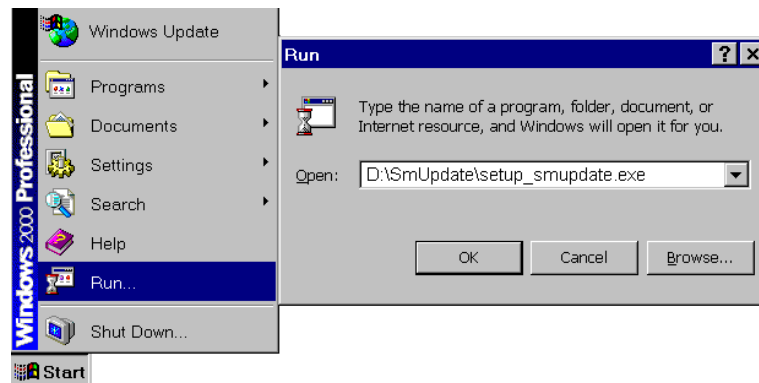
### 3.3 INSTALLATION

SmUpdate is a separate application that needs to be installed on the same machine as Smile 2. In a network environment we will prefer the Master Smile Console (Console ID = 0). This console has special privileges especially when the customer network is not available.

- Step 1: Starting the installation

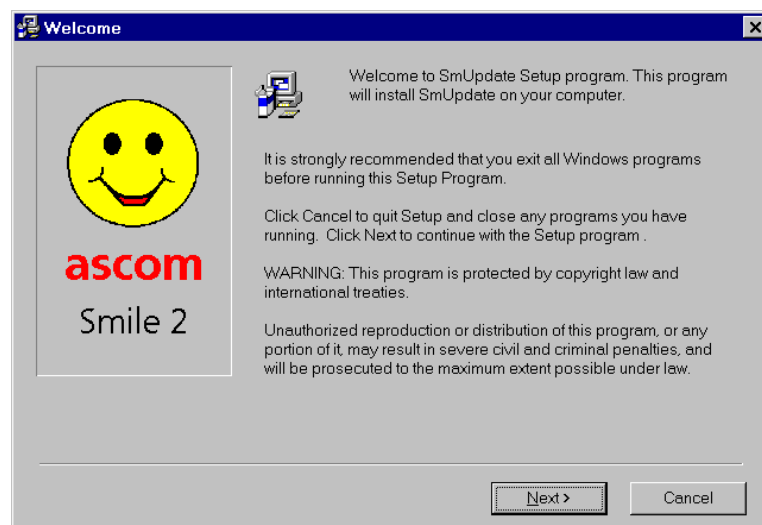
When installing on Windows NT systems (Windows NT4, Windows 2000 Prof. and Windows XP Prof.), make sure that all steps are done with an administrative account.

It is recommended to exit all the other Windows programs before starting the installation. Insert the Smile 2 CD-ROM and start the Setup\_smupdate.exe located in the SmUpdate directory.



If needed, adapt the CD-ROM drive letter d: to match your PC configuration.

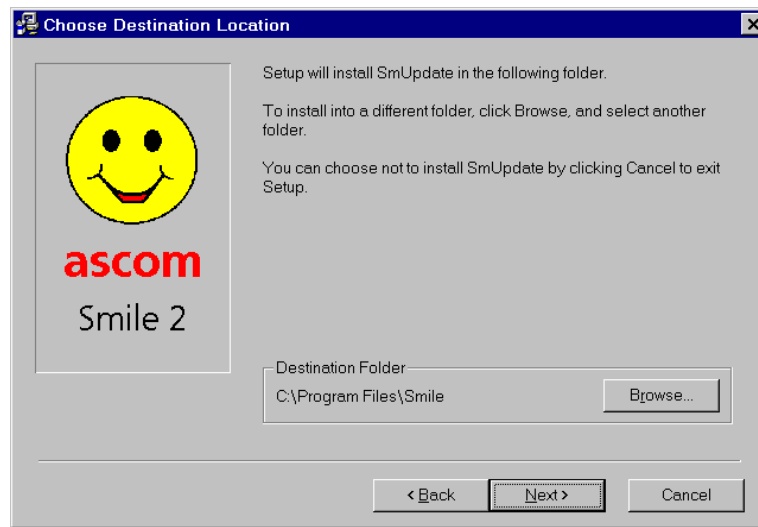
- Step 2: The Welcome message appears



Click <Next> to continue.



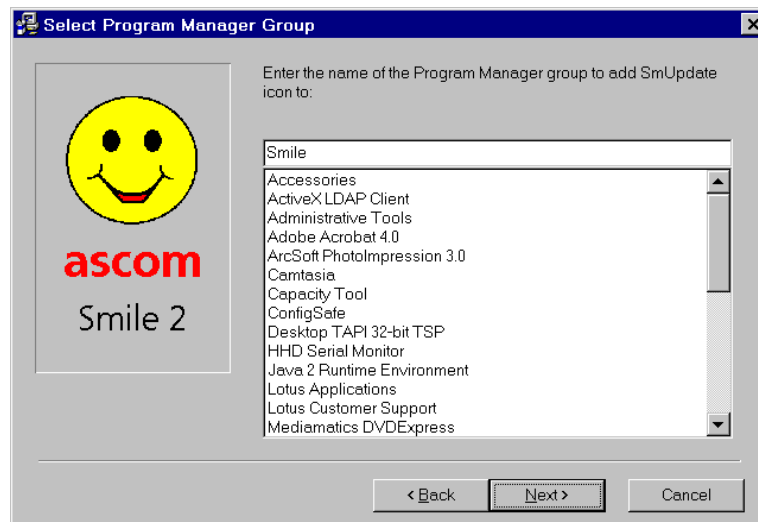
- Step 3: Choose the directory where you want to install the SmUpdate program



By default the program will be installed in 'C:\Program Files\Smile'.  
Click on the <Browse> button if you want to install it in another folder.

Click <Next> to continue.

- Step 4: Specify the program group where you want to add the SmUpdate icon.

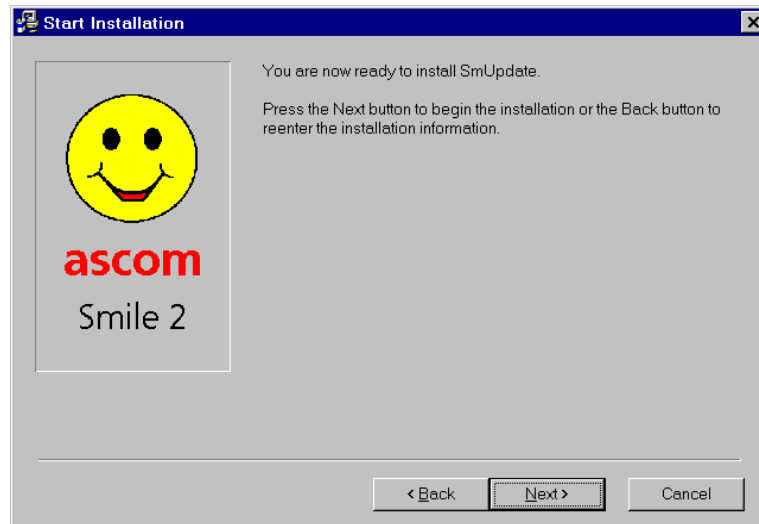


By default the 'Smile' is selected.

If you want, you can select an existing folder or create a new one by entering the name of the new program group.

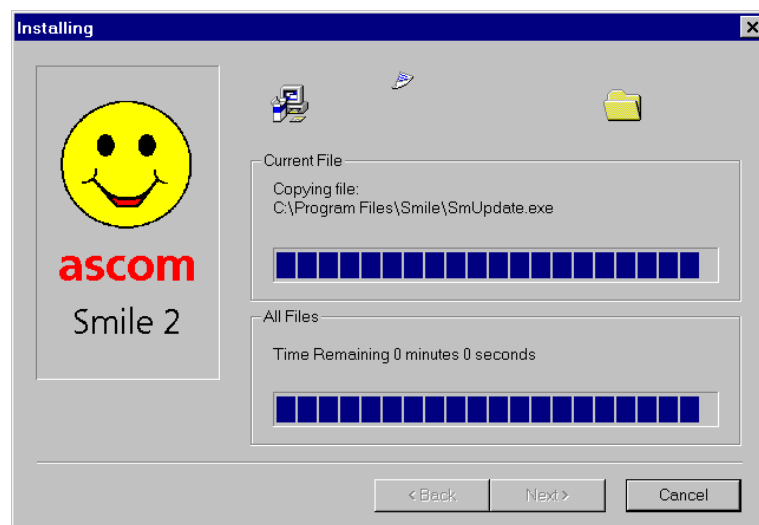
Click <Next> to proceed with the installation.

- Step 5: The installation program has now collected all the necessary information and is ready to start

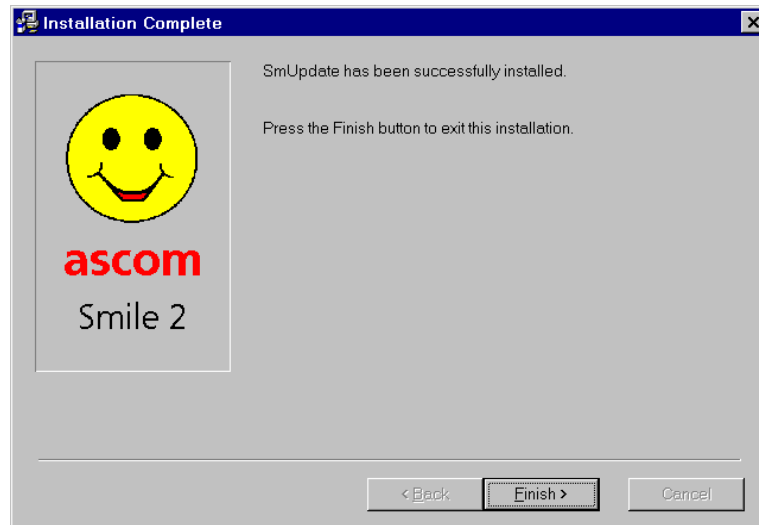


Click <Next> to continue.

All the files are now copied to the hard disk.



- Step 6: At the end of the installation you will see the following dialog box



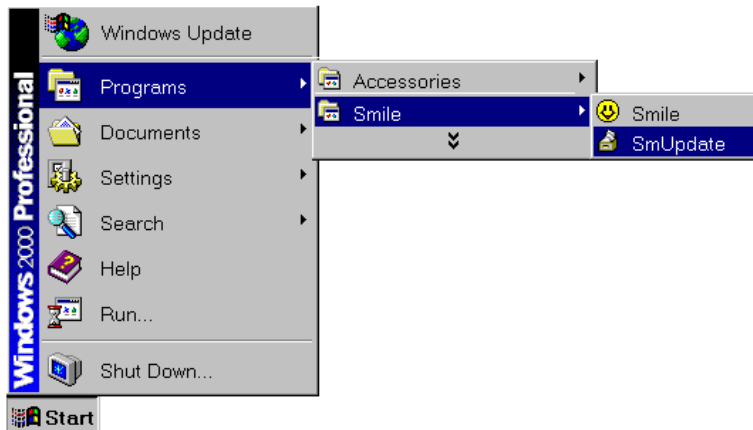
The SmUpdate program has been successfully installed on your computer.

Click <Finish> to complete the installation.

### 3.4 CONFIGURATION

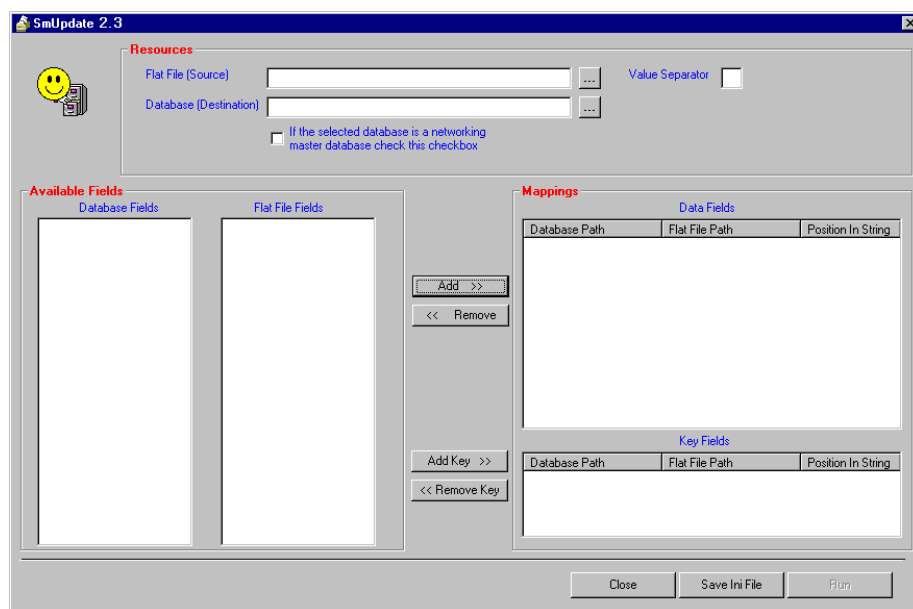
- Step 1: Starting the SmUpdate

Start the SmUpdate by clicking on the SmUpdate icon in the Smile group




The SmUpdate screen appears.

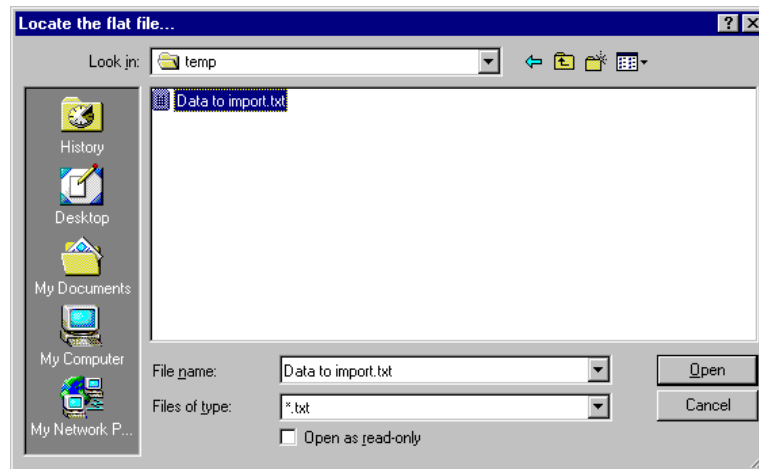
- Step 2: Specify the Resources



Specify the Value Separator. It must be a comma ',' or a semicolon ';'.

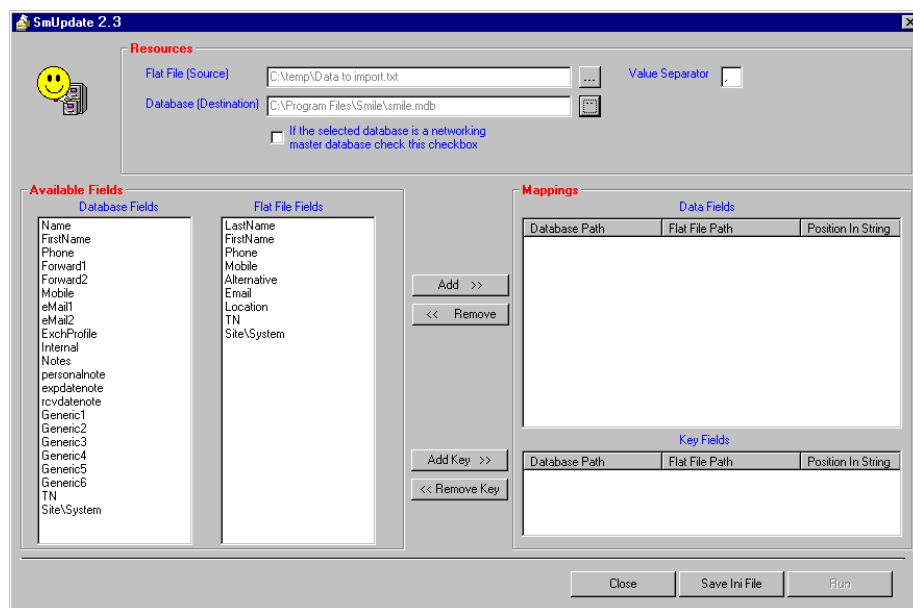
Use the browse button  to specify the files location of the:

- source flat file (e.g.: c:\temp\Data to Import.txt)
- destination database (e.g.: c:\Program Files\Smile\smile.mdb)



After you have filled in these files, SmUpdate will present you the fields available in both files.

- Step 3: Specify the fields mapping



You will map a Flat File field onto a Database field by selecting the corresponding fields and clicking on <Add> button. Perform this step for each field you want to import.

Some fields are missing in the database fields list: ID, Network ID, Name\_\_, Updated and Deleted. They are automatically handled by the SmUpdate application.

After the fields are mapped, you need to indicate which fields are the unique identifiers for the source file. The unique identifier also called Key will be used to link univocally every Smile record to every text file record. Thanks to this identifier the SmUpdate will know which record to update. The Key will **NEVER** change.

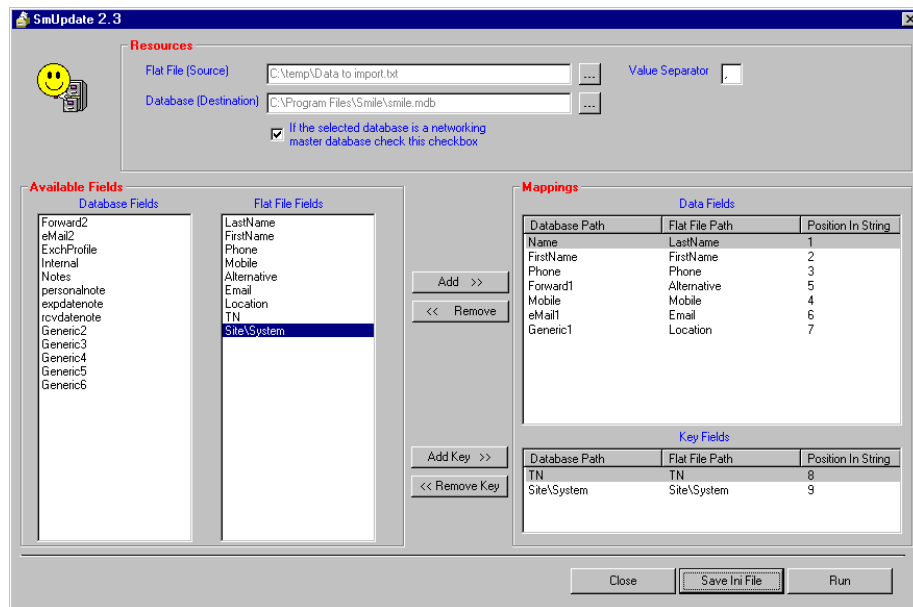
Normally, the destination database will be the Smile.mdb file, whilst the flat file will be the Corporate Directory file generated by the OTM. In this particular case we recommend

you to use the fields 'TN' and 'SiteSystem' to build the KEY. This fields association gives effectively a unique value.

If the flat file comes from another system we may use the e-mail address field or the association of LastName FirstName and Phone to build the key.

Do not forget to specify if the destination database is a networking database with the corresponding check box. If the check box is activated the SmUpdate will treat the UDT (UpDate Transaction number).

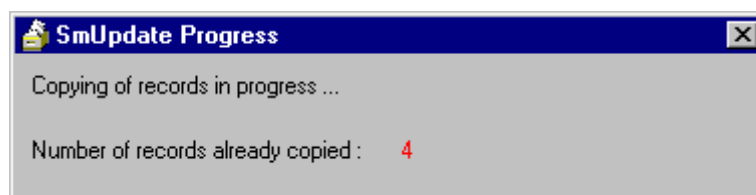
For more information about the UDT refer to the chapter '4 Network Facility'



Before start of the import routine, you can save all configuration parameters into an .INI file called SmUpdate.ini by pressing the <Save Ini File> button.

- Step 4: Start the import

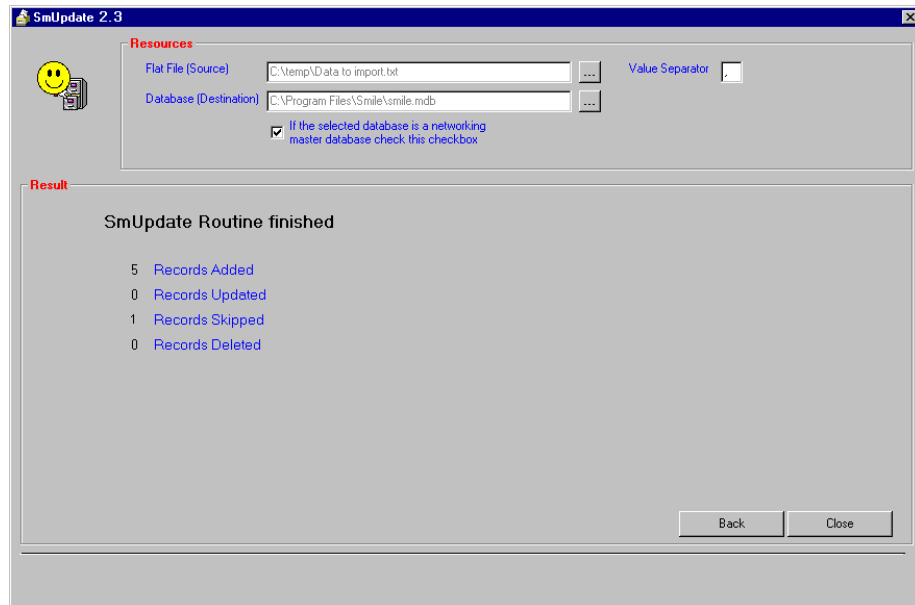
When the necessary fields are mapped and the unique identifiers are indicated you can press the <Run> button to perform the import.



During the import, a message box indicates the number of imported records.

At the end of the import process the result is displayed:

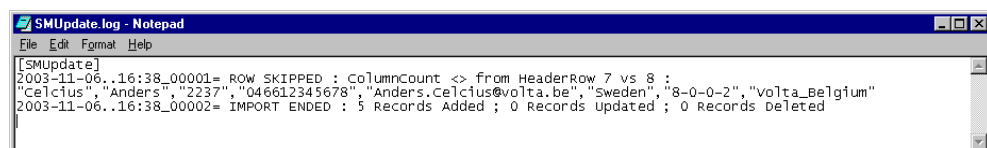
- Number of records added (to the Smile database)
- Number of records updated
- Number of records skipped (e.g.: due to a bad record format)
- Number of records deleted



SmUpdate saves also a summary of the import result in a log file called SmUpdate.log  
The SmUpdate log file can be found in the SmUpdate application directory.

It contains:

- the date and time of the import
- the detailed skipped record (for future analysis)
- the import result ( x records Added, y records Updated, z records Deleted)

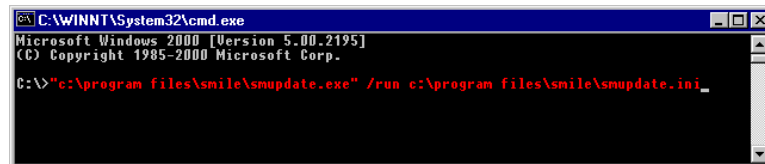


### 3.5 HOW TO SCHEDULE SMUPDATE

By using the /RUN argument we will ask to the SmUpdate to perform the import automatically (no need to click on <Run> button) and to stop at the end of the process.

To do it type the following command in a DOS BOX (in lower case)

```
"c:\program_files\smile\smupdate.exe" /run c:\program_files\smile\smupdate.ini
```



We suppose that the SmUpdate has been installed and configured in the default directory (c:\Program Files\smile).

We can automate this process by using the:

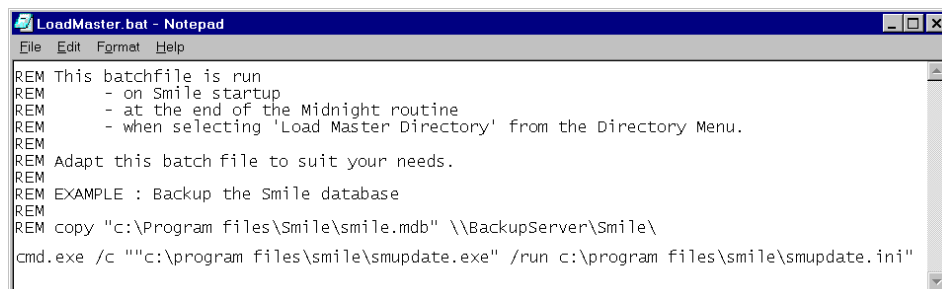
- Loadmaster batch file
- AT command on Win NT 4
- Windows Tasks Scheduler of Win 98SE, 2000 Prof. or XP Prof.

#### 3.5.1 Automation using LOADMASTER

The LOADMASTER batch file is located in the smile directory. It is executed at Smile start-up and at the end of the Midnight Routine. The operator can also start it manually by using the corresponding menu item

Adding the following line (lower case) in the loadmaster batch file will automatically activate SmUpdate when running the LOADMASTER batch.

```
cmd.exe /c ""c:\program_files\smile\smupdate.exe" /run c:\program_files\smile\smupdate.ini"
```

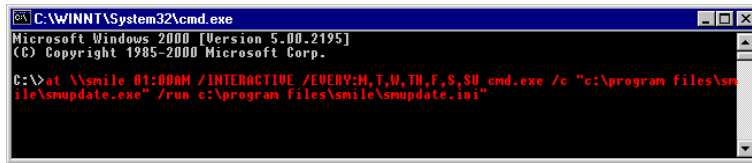




### 3.5.2 Automation using the AT command on Win NT 4

Assuming that the Schedule service is started (Control Panel\Services\Schedule), type the following command in a DOS Box:

```
at \\\SMILE_01:00AM /INTERACTIVE /EVERY:M,T,W,TH,F,S,SU cmd.exe /c
"c:\program_files\smupdate\smupdate.exe" /run c:\program_files\smupdate\smupdate.ini"
```



The SmUpdate will be started automatically on the PC called SMILE, every day of the week at 01:00 AM.

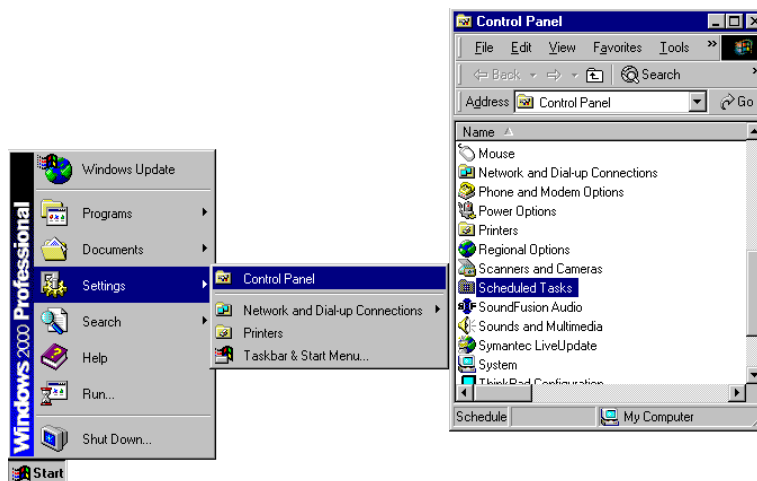
For more information, refer to the Microsoft Windows NT4 documentation.

### 3.5.3 Automation using the Windows Task Scheduler

The Windows Task Scheduler is accessible through the desktop icon 'My Computer' in Windows 98SE and through the Control panel in Windows 2000 Prof.

Note that the procedure below is for a Windows 2000 Prof. system.

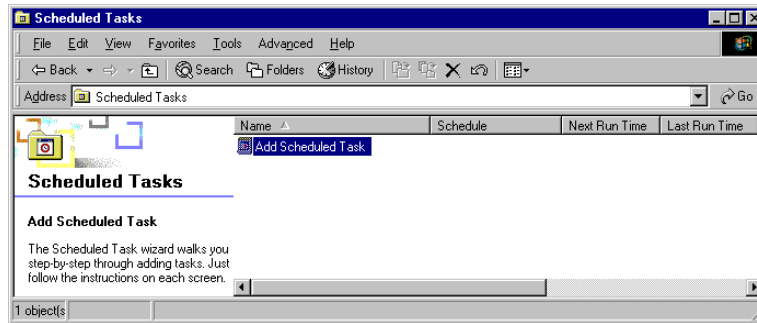
- Step 1: Start the Windows Task Scheduler



Double-click on the 'Scheduled Tasks' item of the Control Panel

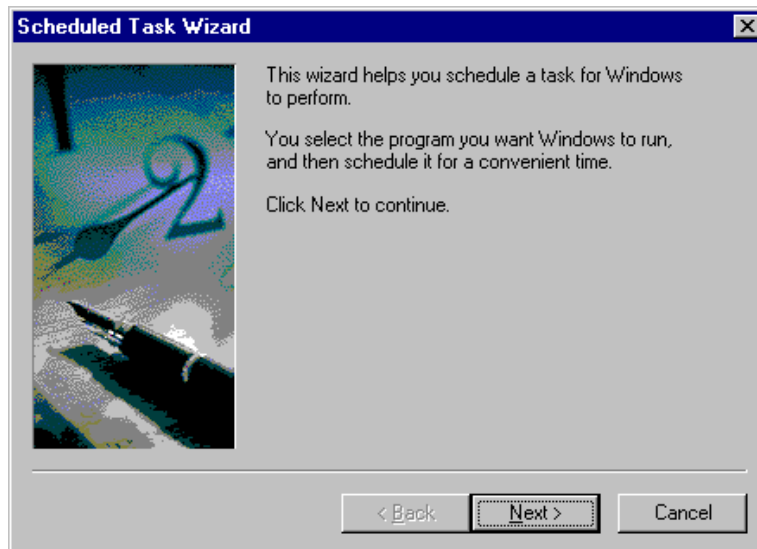
The Scheduled Tasks windows appears.

- Step 2: Create a new scheduled task



Double-click on the Icon 'Add Scheduled Task'

- Step 3: Create a new scheduled task



Click <Next> to continue

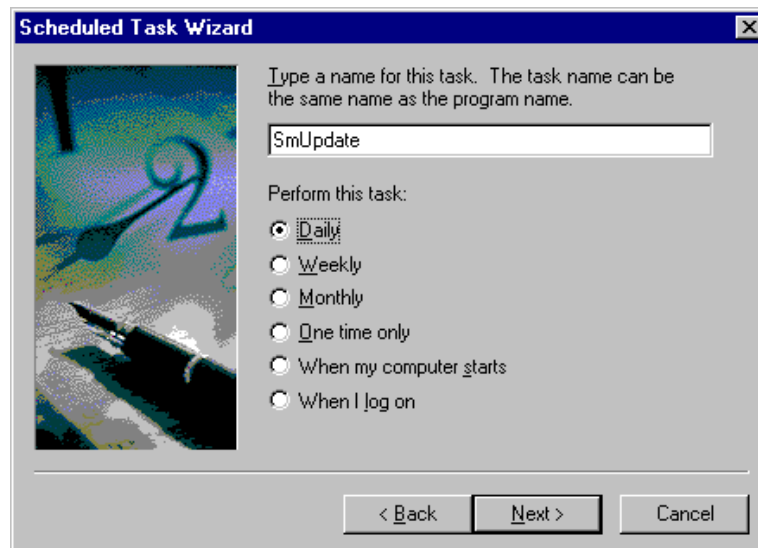
- Step 4: Select the application to schedule



Select the SmUpdate application from the list or use the <Browse> button to locate the SmUpdate application. Remember that by default the SmUpdate application is installed in c:\Program Files\Smile.

Click <Next> to continue.

- Step 5: Define the task name and the frequency



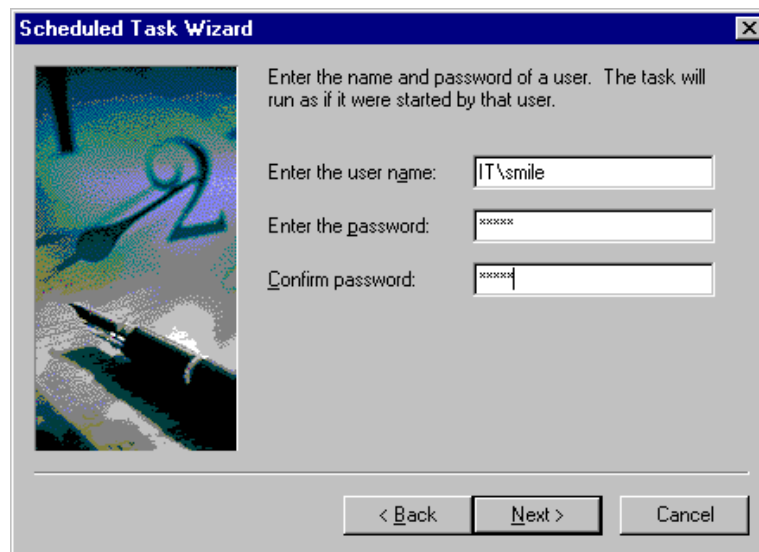
Click <Next> to continue

- Step 6: Select the time and day you want this task to start



Click <Next> to continue

- Step 7: Specify the User name and password used to run the task



Depending of the system security policy, this screen may appear. If it is the case, specify the user name and the associated password that must be used to run the task.

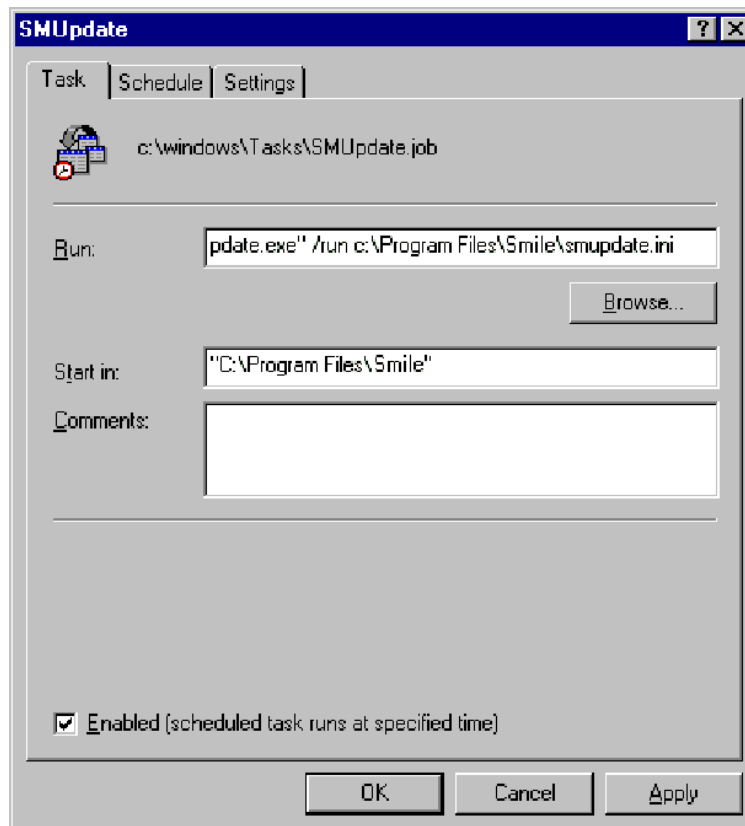
Click <Next> to continue

- Step 8: Task scheduled successfully



Select the Option 'Open advanced properties...' then click <Finish>.

- Step 9: Edit the Run command



Complete the Run command as indicated below:

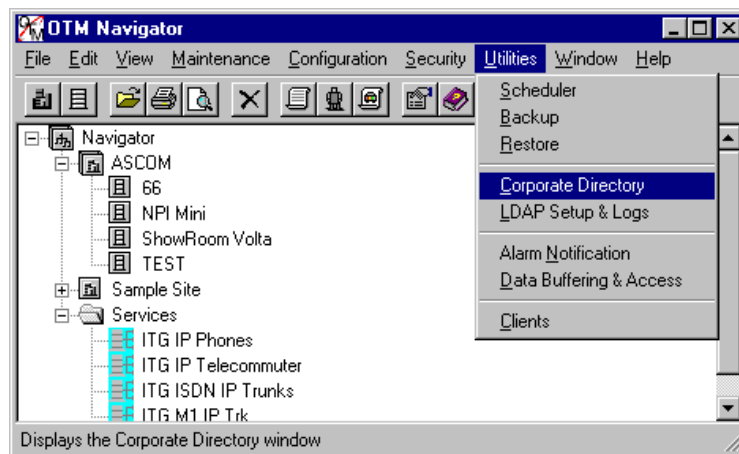
**"C:\Program Files\SMUpdate\SMUpdate.exe" /run c:\Program Files\Smupdate\smupdate.ini**

### 3.6 THE OTM CORPORATE DIRECTORY

This chapter explains how to generate a suitable text file using the OTM Corporate Directory.

- Step 1: Starting the Corporate Directory utility

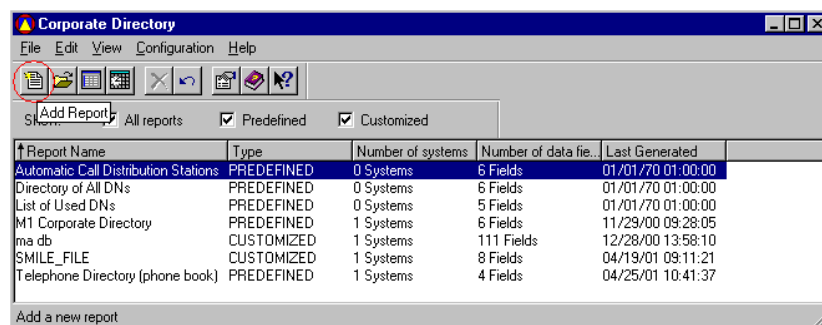
The Corporate Directory menu is accessible through the Utilities menu of the OTM Navigator.



Click on the menu item 'Utilities\Corporate Directory'

The Corporate Directory window appears

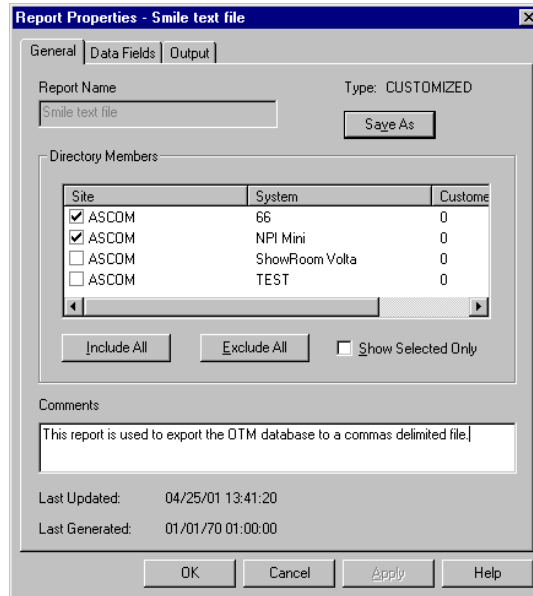
- Step 2: Create a new Corporate Directory report



Click on the <Add Report> icon.

The report properties window appears.

- Step 3: Define the report options



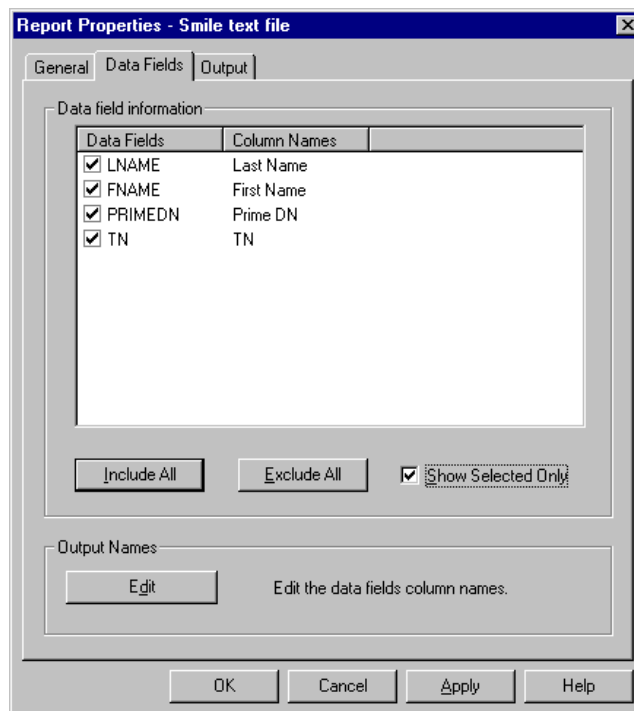
Enter a name for the new report and select all the sites containing the data that you want to export:

E.g.: ASCOM 66 and ASCOM NPI Mini.

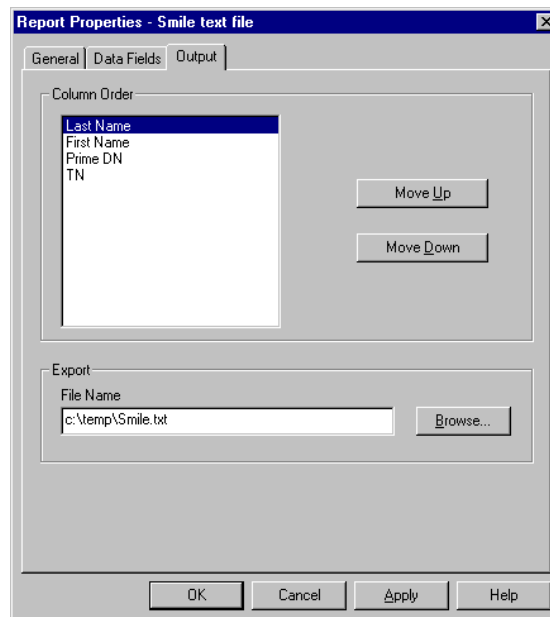
In the <Data Fields> TAB, select the fields to export.

Remember the mandatory fields: LNAME, FNAME, PRIMEDN and TN.

Note that the SITESYSTEM is automatically exported and is not available in the Data Fields list.



Specify a name for the file that will contain the exported data.

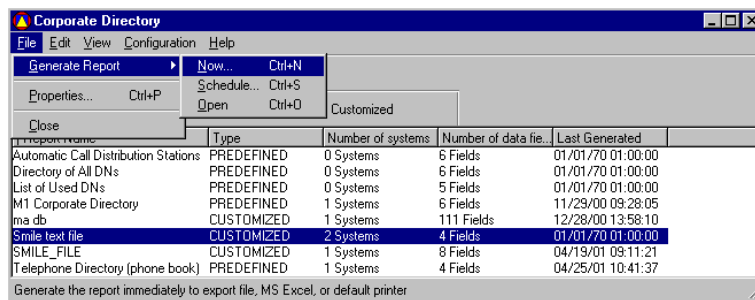


The report is now ready to be generated.

- Step 4: Generate the report

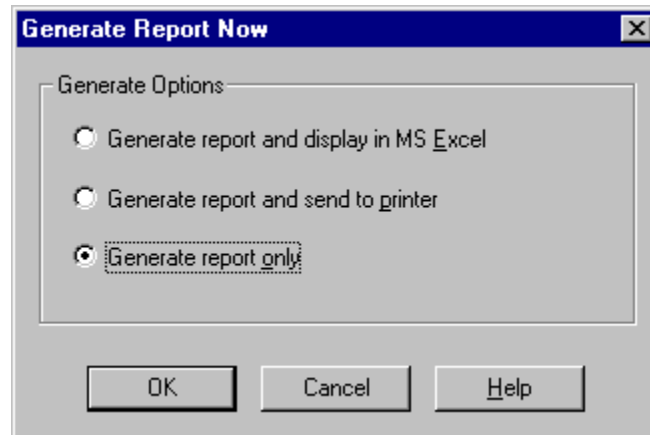
To generate the report, select the menu item: File\Generate Report\Now.

Note that you can also schedule this process.





A new window appears



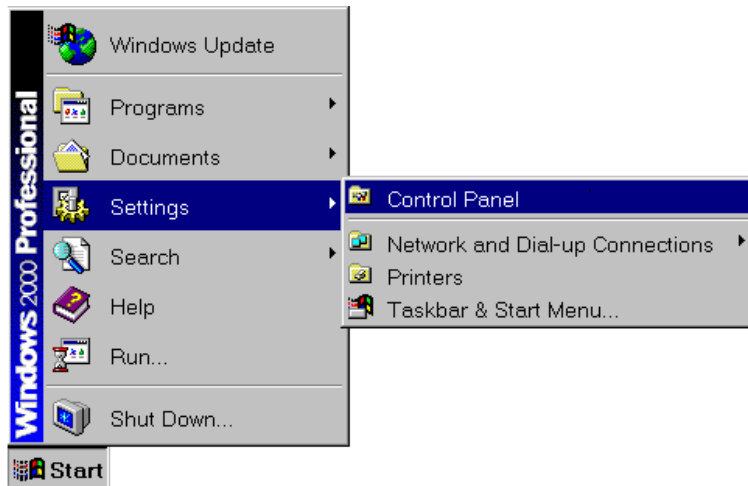
Select the option 'Generate report only'.

Click on the <OK> button to finally generate the report.

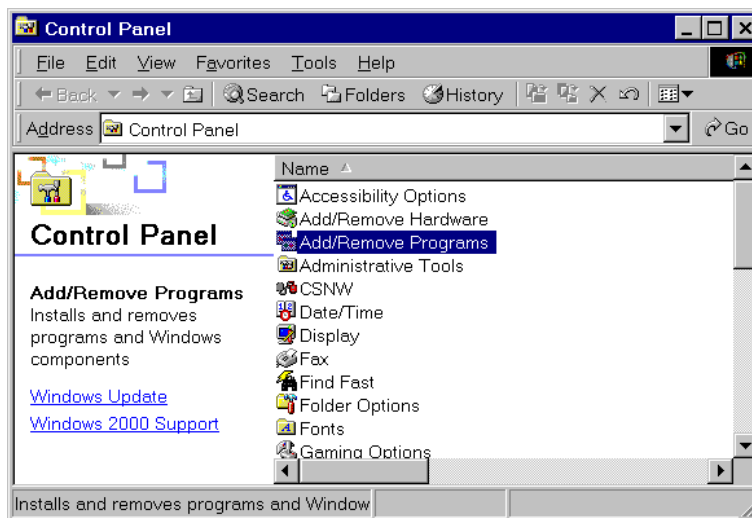
### 3.7 UNINSTALL

- Step 1: Open the Control Panel

When uninstalling on Windows NT systems (Windows NT4, Windows 2000 Prof. and Windows XP Prof.), make sure that all steps are done with an administrative account.

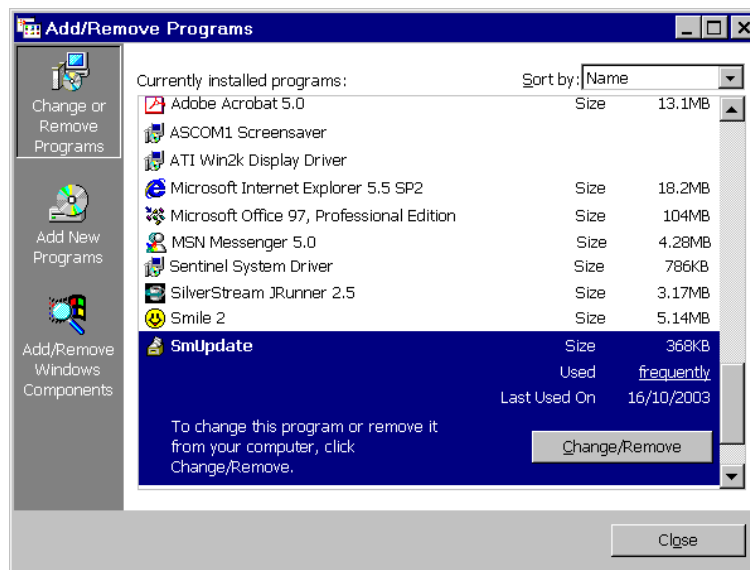


- Step 2: Open the 'Add/Remove Programs' window



Double click on the item 'Add/Remove Programs'

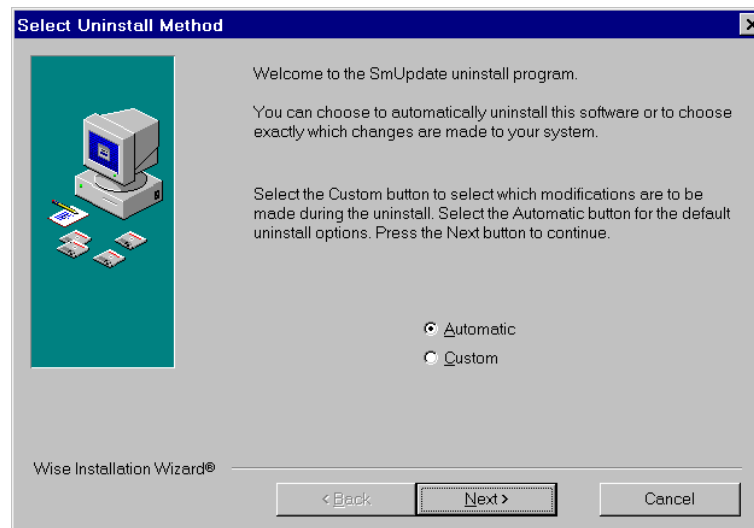
- Step 3: Select the SmUpdate program



Select the SmUpdate program.

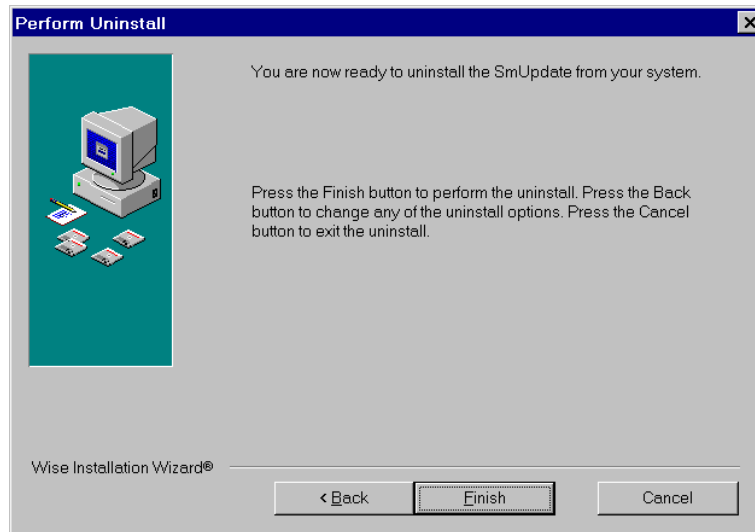
Click on the <Change/Remove> button to continue.

- Step 4: Select the Uninstall Method



Select the Automatic uninstall method and click on the <Next> button to continue.

- Step 5: Confirm the uninstall



Click on the <Finish> button to start the uninstall.

- Step 6: Close the Add/Remove Program window

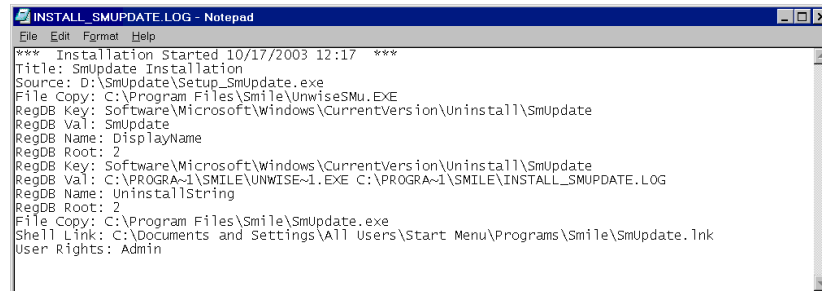
Click <Close> to close the Add/Remove Program window then close the Control Panel

### 3.8 TROUBLESHOOTING

- Installation problem:

During the installation process, the Wise installer creates a log file called Install\_SmUpdate.Log. It will help you to fix the problem.

Below is a sample installation log file:



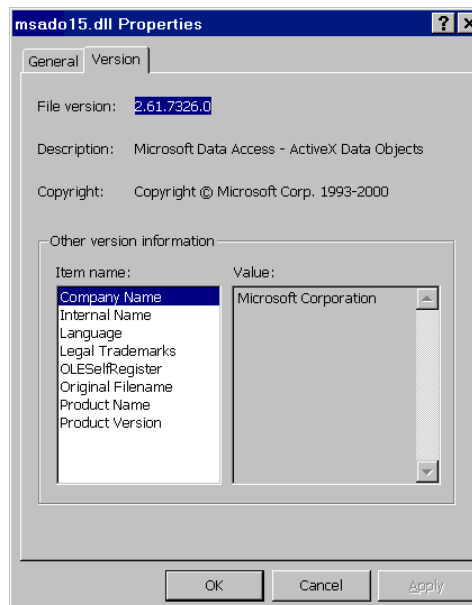
```

INSTALL_SMUPDATE.LOG - Notepad
File Edit Format Help
*** Installation Started 10/17/2003 12:17 ***
Title: SmUpdate Installation
Source: D:\SmUpdate\Setup_SmUpdate.exe
File Copy: C:\Program Files\Smile\UnwiseMu.EXE
RegDB Key: Software\Microsoft\Windows\CurrentVersion\Uninstall\SmUpdate
RegDB Val: SmUpdate
RegDB Name: DisplayName
RegDB Root: 2
RegDB Key: Software\Microsoft\Windows\CurrentVersion\Uninstall\SmUpdate
RegDB Val: C:\PROGRA~1\SMILE\UNWISE~1.EXE C:\PROGRA~1\SMILE\INSTALL_SMUPDATE.LOG
RegDB Name: UninstallString
RegDB Root: 2
File Copy: C:\Program Files\Smile\SmUpdate.exe
Shell Link: C:\Documents and Settings\All Users\Start Menu\Programs\Smile\SmUpdate.lnk
User Rights: Admin
    
```

- Failed to open the Smile database:

The Smile 2 application uses the Microsoft Data Access Component (MDAC) to handle the database. The MDAC must be at least version 2.6. It is automatically installed during the Smile installation process.

To verify the MDAC version installed on your system, consult the property page of the file msado15.dll. The Search utility of Windows will help you to locate the file.



- Run-Time error when importing the data:

Bad source file format:

- The file format must be delimited text file (,) or list separator text file (;)
- The first line contains the column headings
- LastName, FirstName and Phone fields are mandatory
- The field values can be placed between double quotes
- The number of fields must be same for all the lines. It means that, per line, the number of comma must be equal to the number of fields minus 1.
- The number of characters provided for a field in the source file can not exceed the maximum of characters reserved for the associated field defined in the smile database

Bad mapping:

- The three mandatory fields (Name, FirstName, Phone) are not mapped
- The key is not correct. If the Source file is an OTM Corporate Directory we recommend to use the two fields TN and Site\System to build the key.

Bad Destination (Smile database) file:

- The database attribute must be Archive, unselect the Read Only and Hidden attribute
- Repair you Smile database with MS Access if necessary

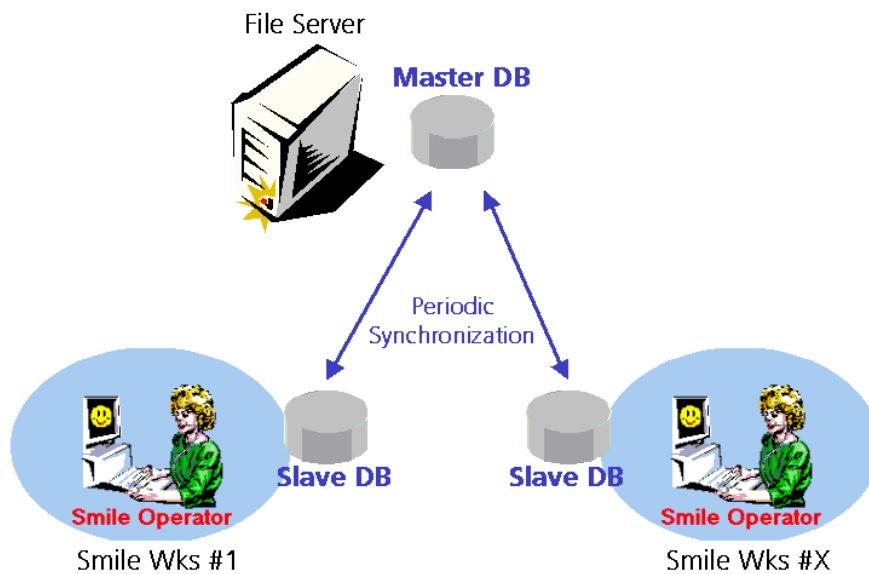
## 4 Network Facility

### 4.1 INTRODUCTION

Due to a high operator load, multiple locations or for some backup reason, a customer may want to have more than one Smile workstation. The automatic database synchronization will rapidly become necessary.

The Smile 'Network facility' is a process running in background. It performs regular synchronizations of the Smile phone books available in the Network. Thanks to it, each time an operator makes an update in his local directory, the change will be automatically reported to the other Smile workstations.

The synchronization mechanism of the Smile requires an extra database: the Master Database. It will be installed on a file server and must be accessible to all the Smile workstations.



All the Smile workstations still use their own database also called 'Slave Database'. This is to guarantee an acceptable real-time response and to avoid the inconvenient of a network failure. On the other hand all the modifications done by an operator on his phone book is immediately reported to the Master Database. Every x minutes each Smile workstation contact the Master Database to retrieve the latest updates.

A network drive icon in the status bar of the Smile will display the availability of the network facility.



The Network facility is available in the Advanced, Premium and VIP Packages of the Smile.

## 4.2 INSTALLATION

There is no special software to install.

We need:

- a suitable Smile 2 dongle (Advanced, Premium or VIP ) connected to the Smile desktop.  
The network facility is not available in the Standard package.
- a file server for the Master Database.  
Note that the Master Smile workstation (Console ID=0) can be the file server.



### 4.3 CONFIGURATION

On the file server:

- Create a new folder (e.g.: Smile Master DB)
- Share the new folder (e.g.: share name is 'Smile Master DB')

On the Smile workstation:

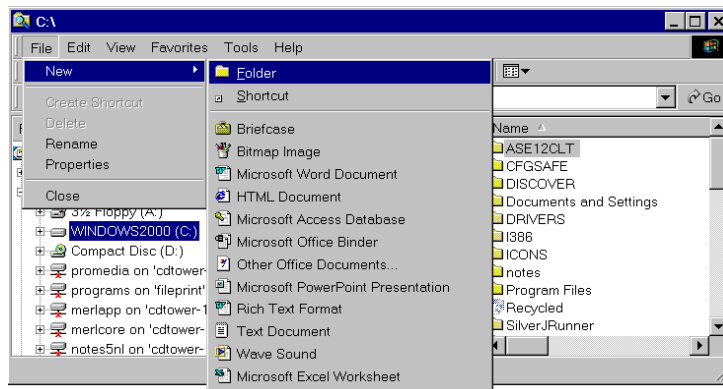
- Map the 'Smile Master DB' folder of the file server
- Copy the Local Smile DB to the mapped 'Smile Master DB' directory
- Configure the Network facility using the Smile configuration utility

Repeat the 3 steps above for each Smile workstation

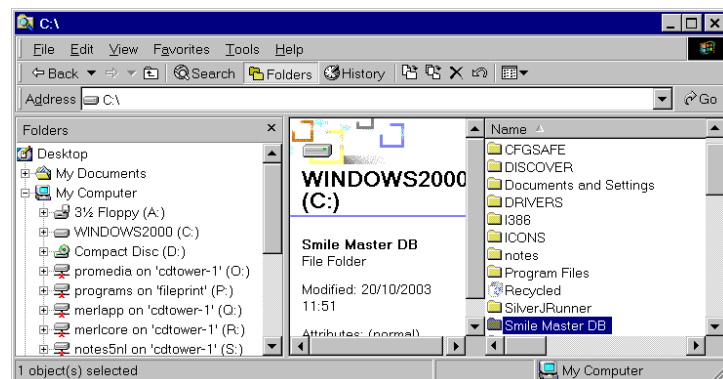
#### 4.3.1 On the file server

- Step 1: Create a new folder

The new folder will be used to store the Master DB.  
Remember that you may use the Master Smile workstation as file server.  
Log into the file server with a user having sufficient privileges to create and share folders.  
Open the Windows Explorer and select the menu item File\New\Folder.



Give a name to the new folder (e.g.: Smile Master DB).

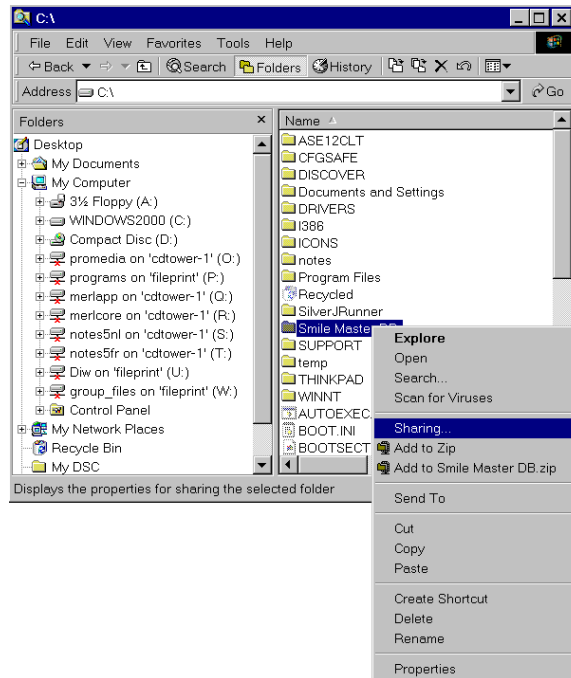


The folder is now created on the file server.

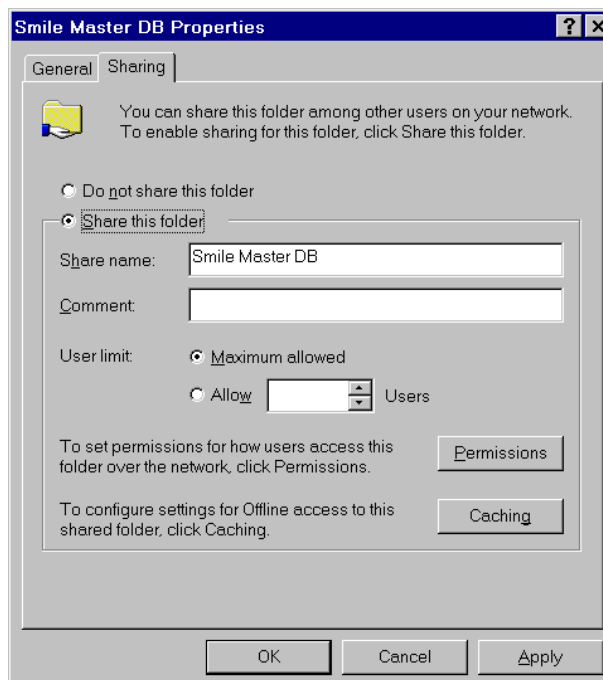
- Step 2: Share the 'Smile Master DB' folder

In order to allow the Smile workstations to access the Master DB we have to share the 'Smile Master DB' folder.

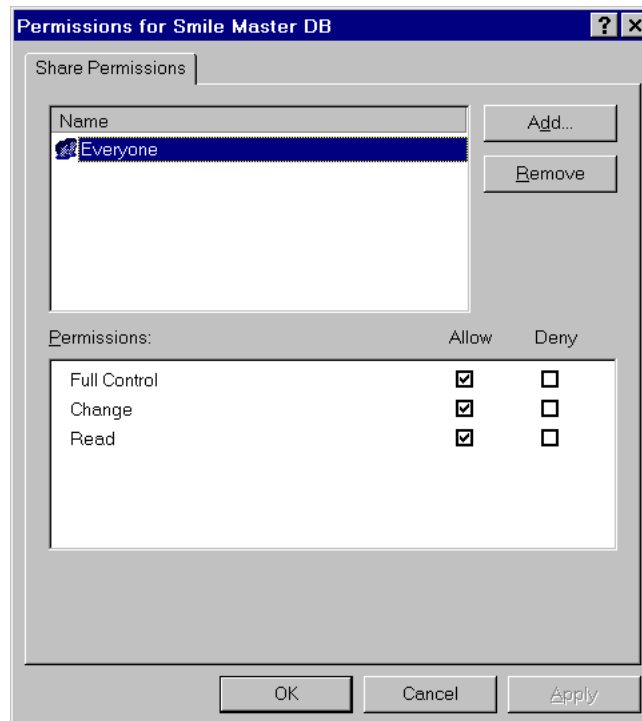
With the Windows Explorer of the file server, right click on the folder 'Smile Master DB' and select the 'Sharing' item.



The Smile Master DB folder properties window appears.



Select the option 'Share this folder'.  
 All Smile workstations must have read and write permission on the Master DB.  
 Adapt the permissions on the Shared folder with the button <Permissions>.  
 The Share Permissions window appears.



Use the <Add> button to add the operators userid and select the check box Full Control Allow for each of them.

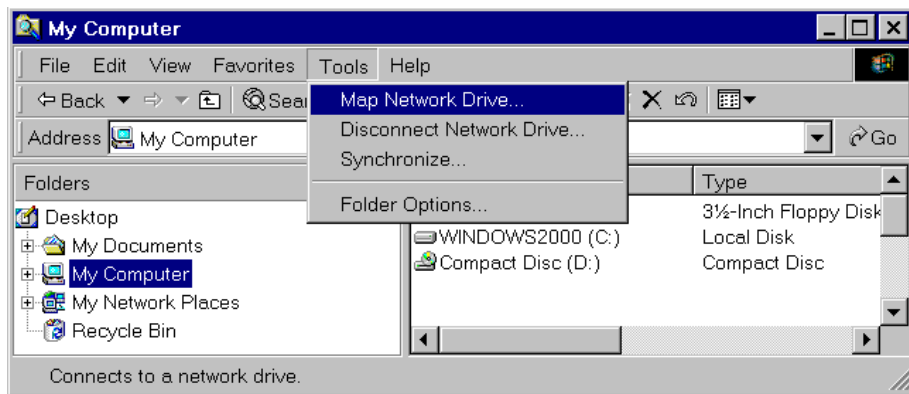
Click <OK> to close the Permissions windows.  
 Click <OK> to close the 'Smile Master DB' folder properties.

### 4.3.2 On the Smile workstation:

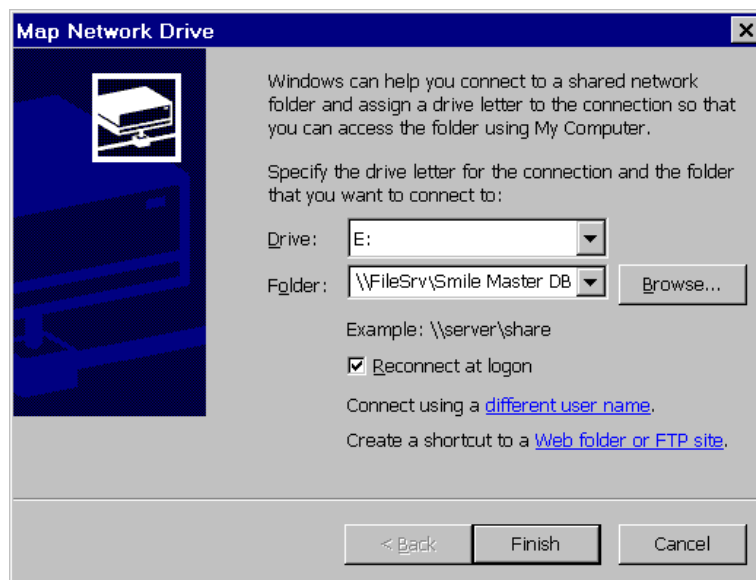
- Step 1: Map the Smile Network Directory of the file server on the smile workstation

Log into the Smile workstation with a user having sufficient privileges to map a folder and to access the shared folder on the file server.

Open the Windows Explorer of the Smile Workstation and select the menu Tools\Map Network Drive.



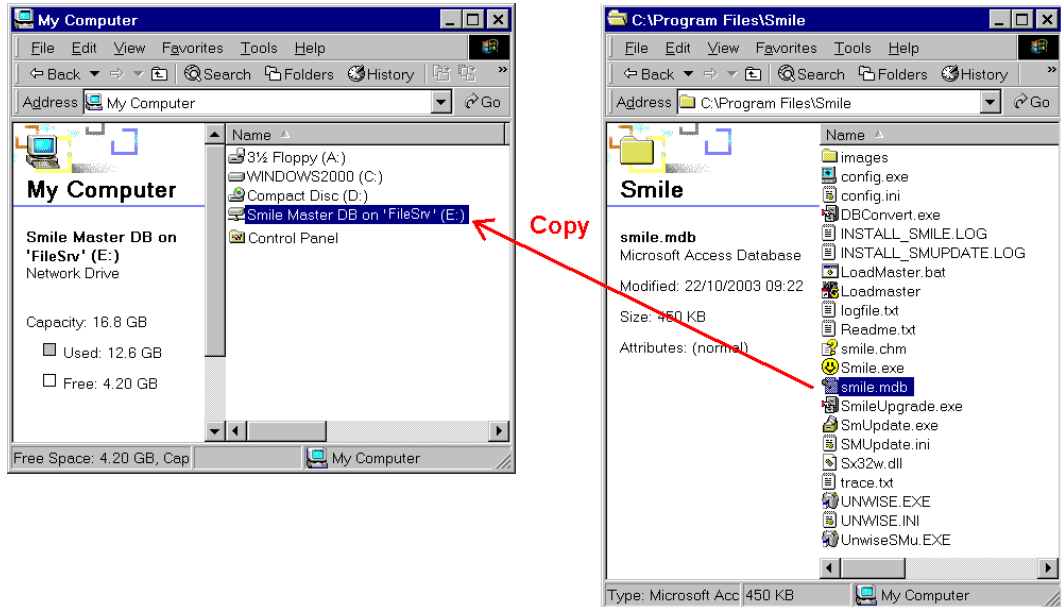
The 'Map Network Drive' window appears



Select an available drive letter and specify the shared folder on the file server. Do not forget to select the 'Reconnect at logon' option. Click <Finish> to complete.

- Step 2: Copy a Local DB into the shared folder of the file server

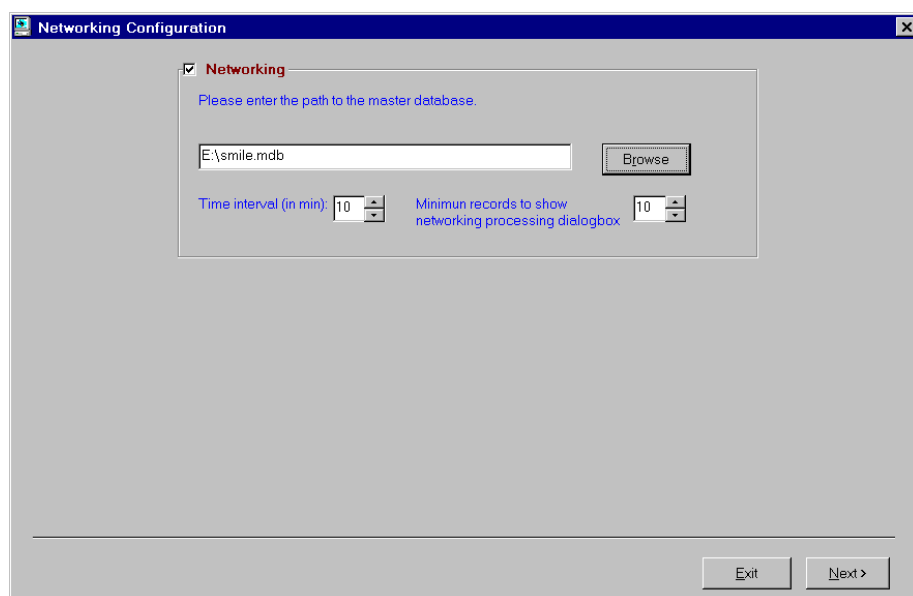
Use the Windows Explorer to copy the Local DB (e.g.: C:\Program Files\Smile\Smile.mdb) to the shared folder of the file server (e.g.: E:\smile.mdb).



- Step 3: Configure the Network facility using the Smile configuration utility

Start the Smile configuration utility (e.g.: C:\Program Files\Smile\Config.exe) and click next until the 'Networking Configuration' window appears.

Note that the 'Networking Configuration' window is presented only in case the dongle present on the Smile console is an Advanced, Premium or VIP dongle.



The check box 'Networking' will allow you to activate the configuration of the network facility.

The 3 configuration parameters of the network facility are:

- Master database name (path included)
- Time interval:  
The time interval (number of minutes) for activating the synchronization algorithm (synchronization of the Local database with respect to the Master database). A range from 1 to 60 minutes is allowed. By default, it is set to 10 minutes. We advise to give the smallest time interval, equal 1 minute, to the Master Smile Console.
- Minimum records to show networking processing dialog box:  
A special dialog box will appear if the number of record to synchronise is greater than the number specified. This is to prevent that the Smile workstation is blocked for a long time due to a long abnormal network synchronisation. I will allow the operator to interrupt the synchronisation process in case of an incoming call.

Click the <Next> button to accept the configuration

During the network configuration, all existing records are assigned UDT=1 (UpDate Transaction nr., see chapter 4.4.1), the configuration file of the Smile workstations contain 'LastTransactionNumber = 1

Click the <Next> button until the end of the configuration process.

- Step 4: Repeat Steps 1 and 3 for each Smile workstation of the network

## 4.4 NETWORK FACILITY DETAILS

The network facility is designed as background routine running permanently without disturbing the Smile look-up functions.

The network facility requires an extra database: the Master Database.

The 'Master Database' refers to one particular copy of the database indicated as Master database during the configuration. It is not assigned to any Smile application.

This can be:

- located at any place in the network (e.g.: on a dedicated file server)
- located on the Master Smile console (Console ID = 0) in a dedicated directory (not in the Smile application directory)

The Master database is a passive database that will be periodically accessed by all the Smile workstations.

The network facility will respect the following rules:

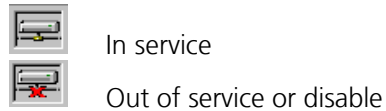
- all actions for synchronization are initiated by the Smile applications running on the consoles. The routine to synchronise a Slave database will activate itself in the following cases:
  - when activating the network facility (i.e. at start-up of Smile or when manually activating the network facility)
  - every X minutes (X being a configurable number) if the Smile console is in Idle state. This routine will interrupt itself in case Smile is interactively activated.
- A change in the Master database can not activate the synchronization of the Slave databases.
- a Slave can only communicate with its Master, there is no direct communication between Slave databases
- synchronization of Slave database is not possible in case the Master database is not accessible

A good local network connection is mandatory for well performing network facility.

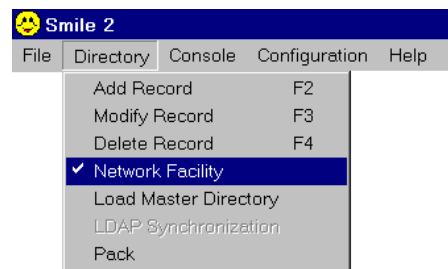
The performance of the network facility strongly depends on:

- the number of consoles in the network
- the configuration and performance of the network
- the size of the local repository
- the number of updates

A network drive icon in the status bar of the Smile will reflect the status of the network facility:



If needed, the administrator of the Smile can disable the network facility by using the menu item 'Directory\Network Facility'.



#### 4.4.1 Assignment of UDT numbers

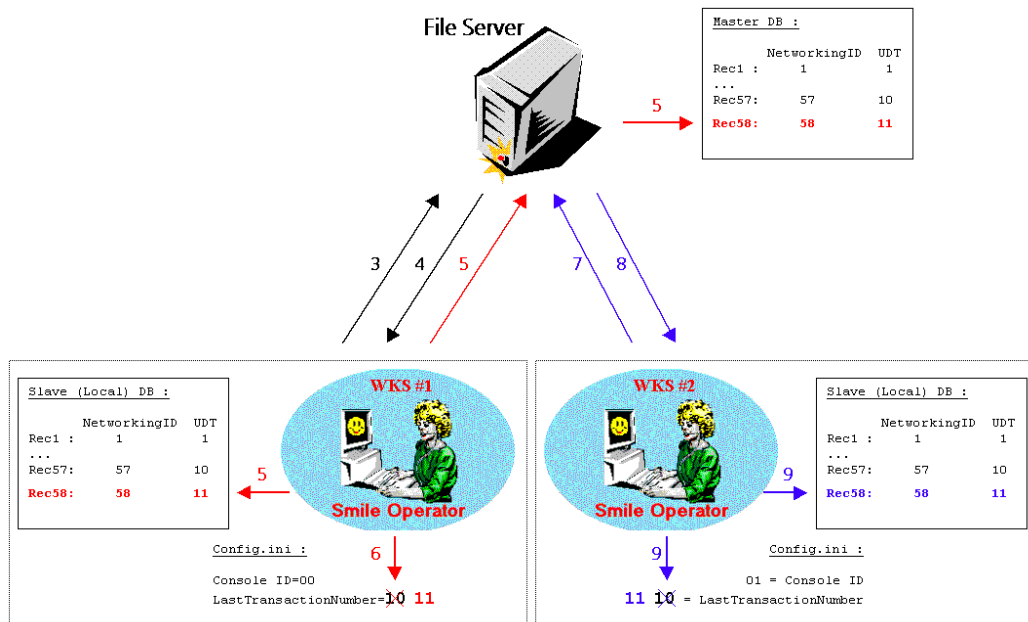
The network facility is based on the assignation of an "UpDate Transaction nr." referenced to as 'UDT'. A UDT number is assigned to each database record and set to 1 during the network facility configuration. The UDT number of a record changes for each update of the record and is set to the greatest UDT found in the Master database plus 1.

Another parameter called 'LastTransactionNumber' is used by the Smile workstations to store the greatest UDT received in the last database synchronisation. Each Smile workstation has its own 'LasTransactionNumber' saved in its configuration file (config.ini).

The following three scenarios explain the handling of the UDT number and the LastTransactionNumber.



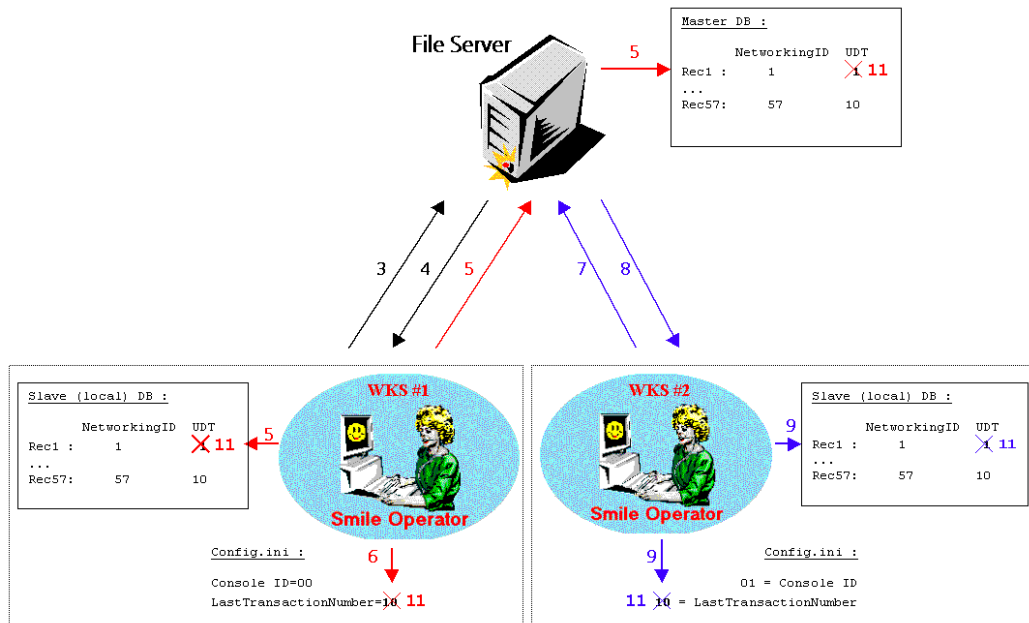
#### 4.4.1.1 ADDING A RECORD



- 1: Suppose that all Smile databases are synchronized (57 records)
- 2: The Smile operator working on the workstation 1 (Wks #1) adds a record
- 3: The Smile Wks #1 queries the Master DB to get the greatest UDT
- 4: The greatest UDT in the Master DB is 10
- 5: The Smile Wks #1 saves the new record in its Slave (Local) DB and in the Master DB with an UDT=11 (greatest UDT of the Master DB + 1)
- 6: The Smile Wks #1 updates the LastTransactionNumber to 11 in its configuration file
- 7: Every X minutes, the others Smile workstations query the Master DB to get the latest database updates. The Wks #2 queries the Master DB to get the records with an UDT greater than its own LastTransactionNumber. In this case all records with UDT greater than 10
- 8: The Smile Wks #2 gets the record 'Rec58' which has an UDT=11
- 9: The Smile Wks #2 saves it in its local DB and updates its LastTransactionNumber to 11

The process of synchronising slave databases (point 7) will become active when Smile is idle. It will be interrupted by the user activity. The synchronization of the slave will take over all changes made on the Master Database since last synchronization.

#### 4.4.1.2 UPDATING A RECORD

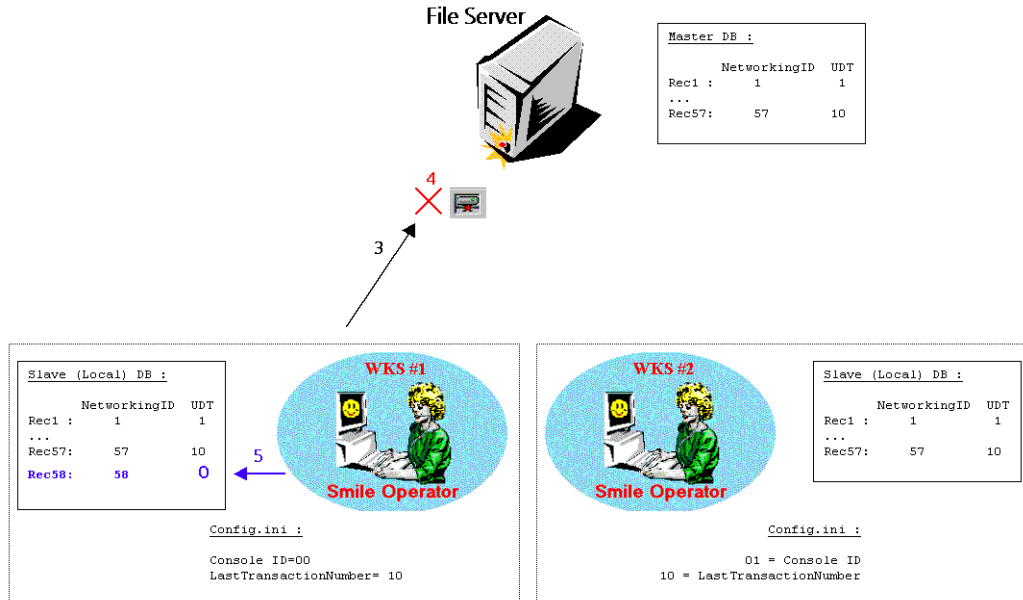


- 1: Suppose that all Smile databases are synchronized (57 records)
- 2: The Smile operator working on the workstation 1 (Wks #1) modifies the record 'Rec1'
- 3: The Smile Wks #1 queries the Master DB to get the greatest UDT
- 4: The greatest UDT in the Master DB is 10
- 5: The Smile Wks #1 updates the changes in its Slave (Local) DB and in the Master DB with an UDT=11 (Greatest UDT of the Master DB + 1)
- 6: The Smile Wks #1 updates the LastTransactionNumber to 11 in its configuration file
- 7: Every X minutes, the others Smile workstations query the Master DB to get the latest database updates. The Wks #2 queries the Master DB to get the records with an UDT greater than its own LastTransactionNumber. In this case all records with UDT greater than 10
- 8: The Smile Wst #2 gets the record 'Rec1' which has a UDT=11
- 9: The Smile Wks #2 saves it in its local DB and updates its LastTransactionNumber to 11

Deletion of a record in an Access database flags the record as 'deleted'. This flag will be propagated through the network by the network facility. A 'Pack' of the database will actually delete the records flagged as "deleted".

Consequently, pay attention to only pack the Master Database in case all changes due to deletions have been propagated to all Slave Databases. Otherwise a database could still have records already deleted in the Master.

#### 4.4.1.3 MASTER DATABASE NOT ACCESSIBLE



- 1: Suppose that all Smile databases are synchronised (57 records).
- 2: The Smile operator working on the workstation 1 (Wks #1) adds a record
- 3: The Smile Wks #1 queries the Master DB to get the greatest UDT

4: No answer from the Master DB. The Master DB is not available.

5: The Smile Wks #1 saves the new record in its Slave (Local) DB with an UDT=0. It means that the UDT has not been determined successfully

6: Every X minutes, the Smile Wks #1 will try to add the record into the Master DB. During this disturbance, only the Master Smile Console (ConsoleID = 0) will be able to edit its Local DB. When the connection with the Master DB is back the Wks receives the greatest UDT of the Master DB and then the normal process can take place.

When the Master Database is not accessible, the synchronization routine will abort. It will restart when the time interval parameter expires (every X minutes).

In case of a large number of records changes in the Master Database, it is recommended to replace the slave repositories by a copy of the Master database. This will prevent an overload of the network facility.

The 'Load Master' facility available in the Smile menu could be used to perform this task. Refer to chapter '2.8 LoadMaster Directory'

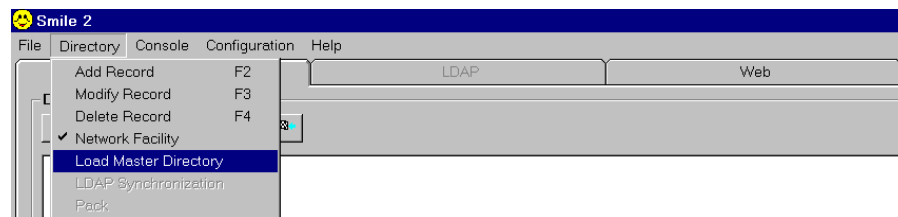
#### 4.4.2 Network facility activation and deactivation

Two conditions must be fulfilled to have the network facility available on a console, these are:

- the type of the dongle must be Advanced, Premium or VIP
- the network facility is correctly configured.

If the network facility is available, the following rules apply on the activation or deactivation of the facility on the local console:

- An item in the Directory menu ('Network facility') will allow the Smile administrator to activate or deactivate the automatic synchronization. A flag in front of this item indicates the synchronization is active on the console. Clicking the item will de-activate (remove the flag) or activate (insert the flag) the network facility, depending on the current state (active or not active). This current state is saved in the config.ini file in order to be used at next Smile start-up.



- In case the automatic synchronization is not active on a console, Smile will function as standalone (no network facility present). All changes of the local repository database forbidden except on the Master Smile console (Console ID=0). The SmUpdate and LDAP Update routines act directly on the Master Database and are not affected by the deactivation of the network facility on any console.
- At start-up or when activating the network facility, Smile will try to identify the Master database and check if it is read accessible. In case these conditions are not fulfilled, the operator will see the network drive icon in the status bar with a red cross. The config.ini file does not register this deactivation. In case activation succeeds, Smile will immediately synchronize the local repository with the Master database.

#### 4.4.3 Interference with other database update facilities

The 'SmUpdate' program and the 'LDAP Update' facility will run on the Master Smile console (Console ID=0) and update the Master database directly.

The same Update Transaction number (UDT) is assigned to all updates made during a SmUpdate or LDAP Update run.

The 'network facility' will distribute the updates to all consoles.

It is advised to replace slave databases with a copy of the master database (using the 'Load Master Database' routine) in case a large set of records has been changed. This in order to unload the permanent synchronization routine.

## 4.5 UNINSTALL

On the Smile workstation:

- Deactivate the Network facility using the Smile configuration utility
- UnMap the 'Smile Master DB' on the smile workstation

Repeat Steps 1 and 2 for all the Smile workstations part of the network

On the file server:

- Remove the shared folder of the file server

## 4.6 TROUBLESHOOTING

- The network facility configuration page is not accessible within the Smile configuration utility

This is typically due to a dongle detection problem:

- check if the Smile dongle is connected
- check the type of dongle. It must be Advanced, Premium or VIP
- check if the Sentinel Driver is installed

- The network drive icon remains not connected

It means that the Smile application can't open the network database.

On the file server:

- check if the Smile Network directory is shared
- check the permissions
- check if the file smile.mdb is in the directory

On the workstation:

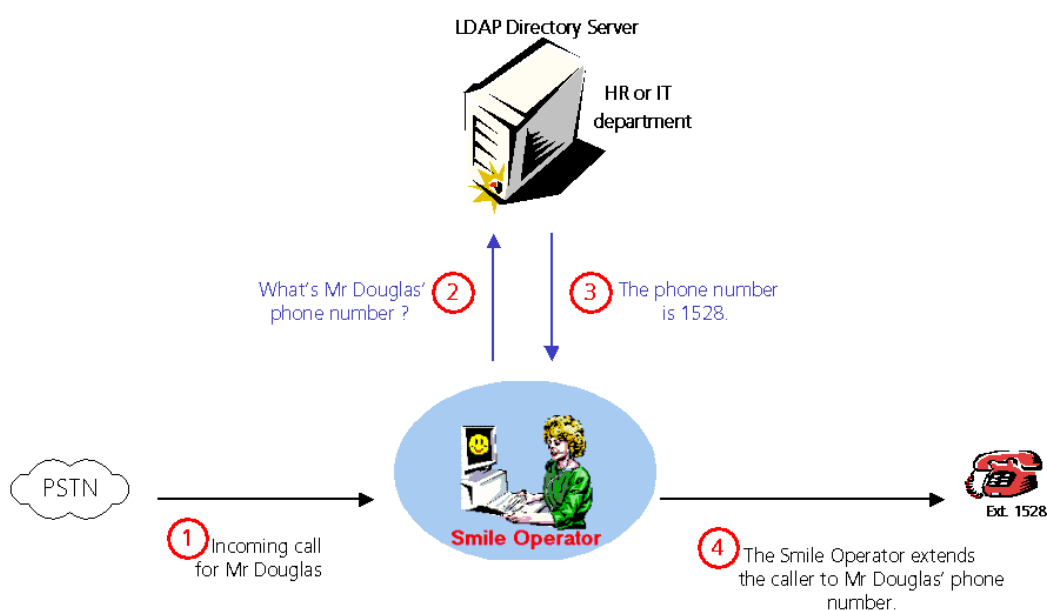
- check the mapping. Can you see the Master database
- check the network facility configuration. Refer to chapter '4.3 Configuration'

## 5 LDAP

### 5.1 INTRODUCTION

LDAP, Lightweight Directory Access Protocol, is an Internet protocol that programs can use to look up contact information from a server. It has a special internal structure that allows retrieving information on persons very quickly based on a number of parameters that can be defined. Exactly this rather fast data retrieval feature is useful for Smile.

Smile works mainly with a local repository of persons. Any query to find a person of the organization is executed on this local repository. We have implemented the LDAP protocol into the Smile so that the operators can either look for a person in his local repository and/or in a LDAP directory: this is the LDAP lookup feature.



In addition, it is possible to update the local repository of the Smile with the LDAP directory: this is the Smile LDAP Update feature.

The LDAP lookup is a part of the Standard Smile package and the LDAP Update of the Advanced Smile package.

The following chapters describe in more detail the LDAP lookup and LDAP Update functions.

## 5.2 LDAP LOOKUP

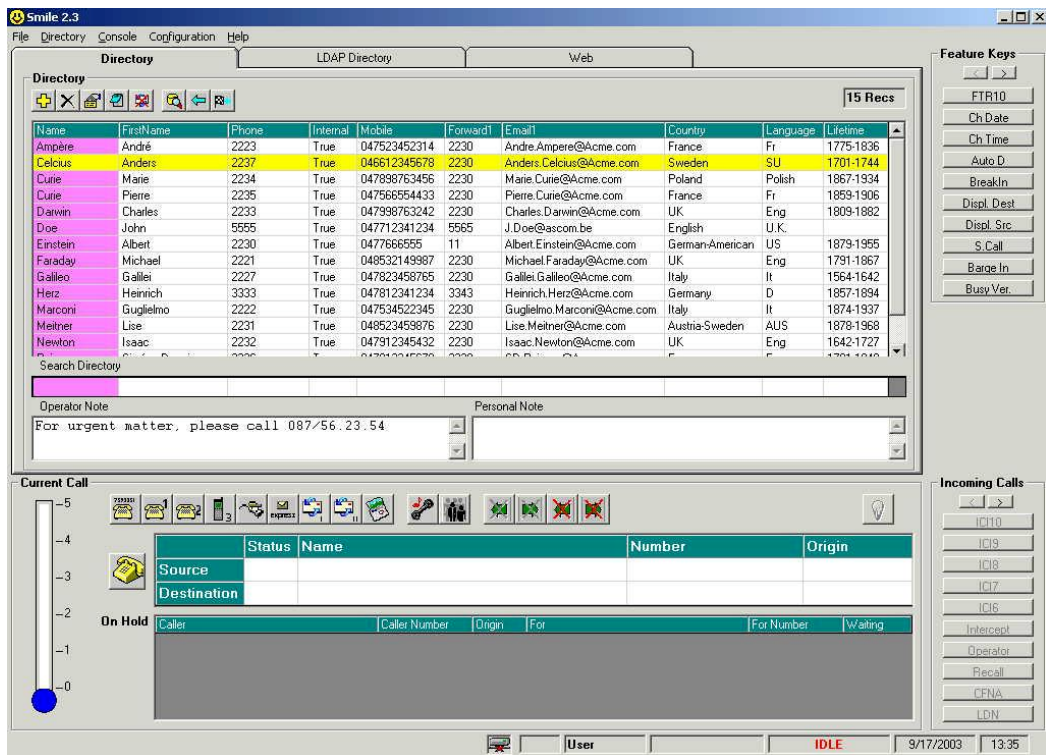
### 5.2.1 Introduction

The operator has the possibility to select either the local repository, the LDAP directory or the Web pages to look up information.

This is made possible via the three tabs on the main screen:

- Directory (Local database/repository)
- LDAP Directory (LDAP server database)
- Web (HTML pages)

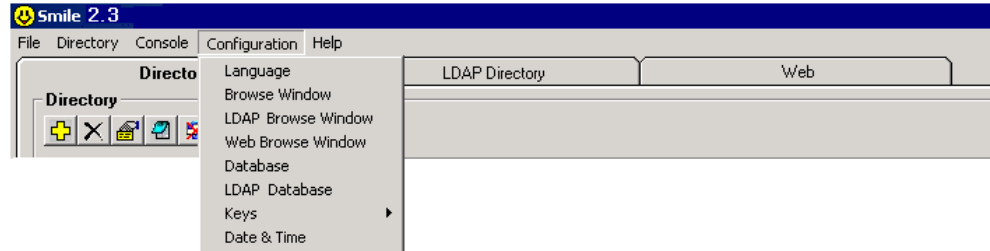
At start-up, the application displays the local repository tab. A mouse click on the tab heading allows you to select the desired tab. Switching from one tab to another can also be done using <Ctrl>+<Tab> (display next tab) or <Ctrl>+<Shift>+<Tab> (display previous tab).



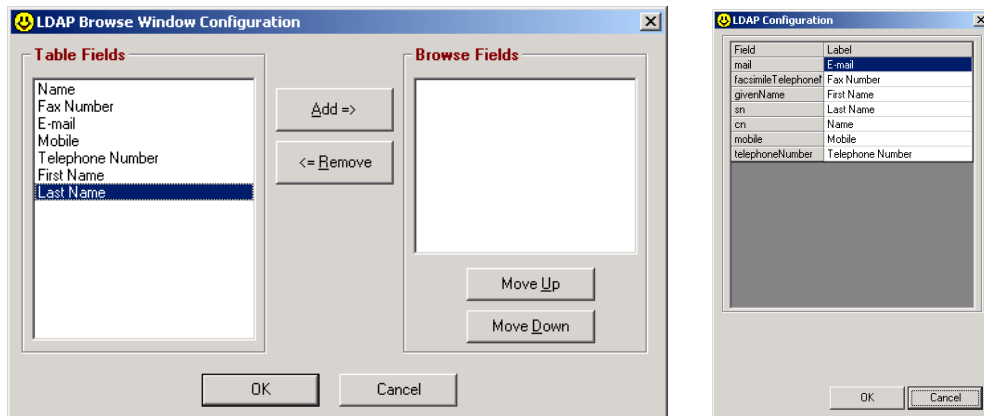
The screenshot shows the Smile 2.3 application window with the 'Directory' tab selected. The main area displays a table of 15 records with columns: Name, FirstName, Phone, Internal, Mobile, Forward1, Email, Country, Language, and Lifetime. Below the table are fields for 'Operator Note' and 'Personal Note'. The bottom section includes a 'Current Call' area with a status indicator and a table for call details, and an 'Incoming Calls' area with a list of call numbers. The status bar at the bottom shows 'User', 'IDLE', '9/17/2003', and '13:35'.

Name	FirstName	Phone	Internal	Mobile	Forward1	Email	Country	Language	Lifetime
Ampère	André	2223	True	047523452314	2230	Andres.Ampere@Acme.com	France	Fr	1775-1836
Celcius	Anders	2237	True	046612345678	2230	Anders.Celcius@Acme.com	Sweden	SU	1701-1744
Curie	Marie	2234	True	047898763456	2230	Marie.Curie@Acme.com	Poland	Polish	1867-1934
Curie	Pierre	2235	True	047566554433	2230	Pierre.Curie@Acme.com	France	Fr	1859-1906
Darwin	Charles	2233	True	047998763242	2230	Charles.Darwin@Acme.com	UK	Eng	1809-1882
Doe	John	5555	True	047712341234	5565	J.Doe@ascom.be	English	U.K.	
Einstein	Albert	2230	True	0477666555	11	Albert.Einstein@Acme.com	German-American	US	1879-1955
Faraday	Michael	2221	True	048532149887	2230	Michael.Faraday@Acme.com	UK	Eng	1791-1867
Galleo	Gallei	2227	True	047823458765	2230	Gallei.Galleo@Acme.com	Italy	It	1564-1642
Herz	Heinrich	3333	True	047812341234	3343	Heinrich.Herz@Acme.com	Germany	D	1857-1894
Marconi	Guglielmo	2222	True	047534522345	2230	Guglielmo.Marconi@Acme.com	Italy	It	1874-1937
Melner	Lise	2231	True	048523459876	2230	Lise.Melner@Acme.com	Austria-Sweden	AUS	1878-1958
Newton	Isaac	2232	True	047912345432	2230	Isaac.Newton@Acme.com	UK	Eng	1642-1727

The configuration of the local repository tab in Smile is accessible via the configuration menu items. The LDAP tab will be customizable in a similar way. A customization will influence only the display on that local console.



The 'LDAP Browse Window' specifies the database fields to be displayed on the LDAP Directory tab and the 'LDAP Database' specifies the column headings to display.



The 'LDAP Browse Window Configuration' dialog box displays a list of LDAP database fields. The <Add> and <Remove> buttons allow adding or removing fields to be displayed. Their position is changed by clicking on the <Move Up> and <Move Down> buttons.

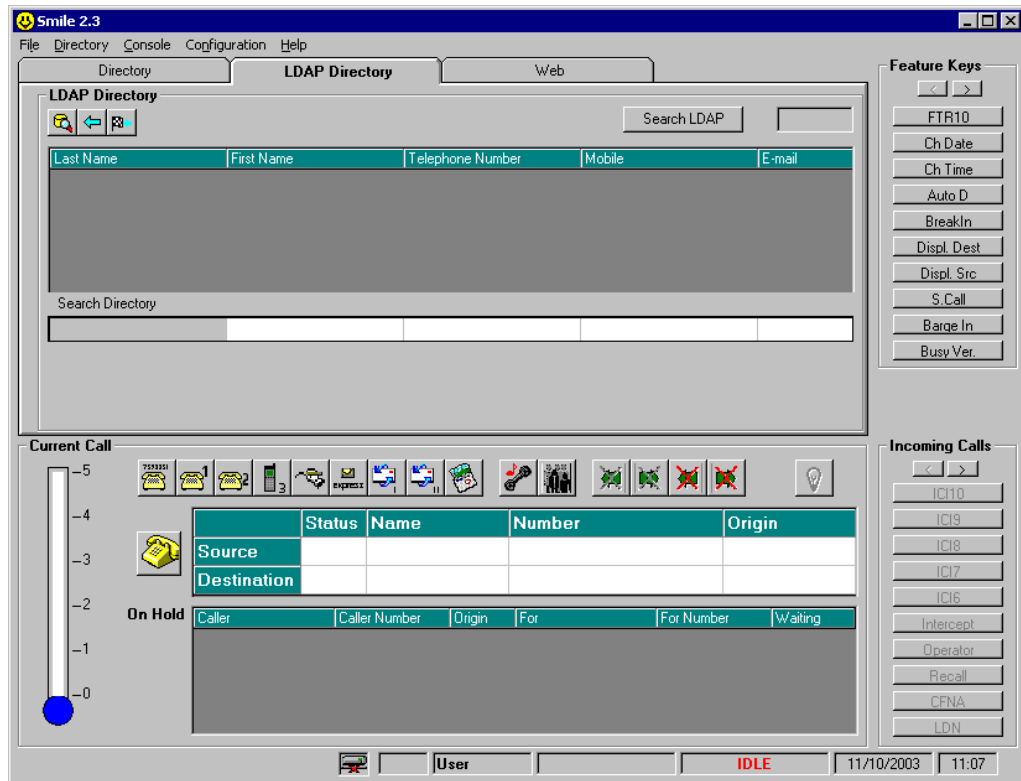
Note that the displayed database fields on the LDAP Directory tab are independent of the fields displayed on the Directory tab.

The operator will never have write access to the LDAP database. Consequently, the options 'Edit Notes' and 'Edit Database' check boxes (which are on the bottom of the 'Database' setting dialog box) are omitted in the 'LDAP Database' setting dialog box.

Smile saves all these settings in the Config.ini file and remembers the last configuration at next login.

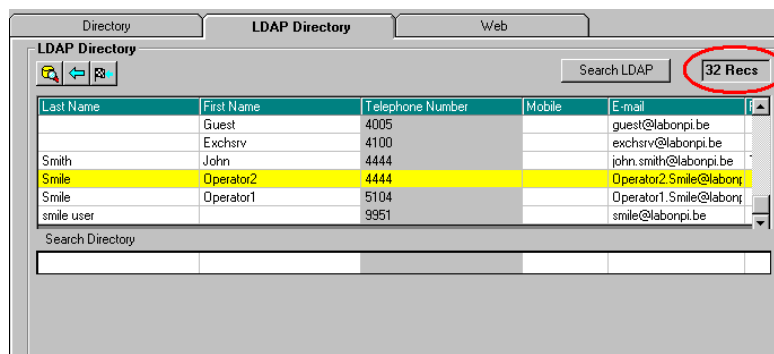


The 'Operator Note' and the 'Personal Note' are not available on the LDAP Directory tab.



The width of columns on the LDAP Directory tab is also customizable by dragging the column border with the mouse. This new width is saved in the Config.ini file and will be remembered at next login. The width of columns is reinitialized when changing the choice of database fields to display. All columns are initially set to have equal width, i.e. the total width of the directory divided by the number of columns displayed.

To reduce the network load, the application does not invoke a new search request to the LDAP server every time the operator types a character in one of the "Search Directory" fields. Instead, the user will have to give the command to launch the search request. A button <Search LDAP> (Shortcut F5) allows the user to invoke a new LDAP search request. The maximum number of LDAP records loaded and a LDAP time out period further limits the search on the LDAP (refer to the chapter '5.2.3 LDAP LookUp Configuration'). The number of records downloaded will be displayed on the screen.





Once the system has downloaded the records, they are displayed in the “LDAP Directory” tab. If the operator now starts typing in one of the “Search Directory” fields, the system will automatically scan the downloaded records to find entries that match more closely. At any time the operator can press the <Search now> button again (or press F5) to start a new query on the LDAP server and to download new search results.










The current ‘conditions’ in the “Search Directory” fields are taken over when switching tab pages. If the operator changes from the local repository to the LDAP Directory tab page, the current ‘conditions’ in the “Search Directory” fields are filled in mapped LDAP “Search Directory” fields. The operator can then choose to either add ‘conditions’ or initiate the search on the LDAP Database. The same is true for the reverse switch (from LDAP to local repository). There, a search is launched immediately on the local repository.

A mapping between local repository fields and LDAP fields needs to be configured in order to activate this feature of taking over conditions when switching tab pages. How to set up this 1 to 1 relations is explained in section 5.2.3 step 4.

Smile will not allow the operator to modify the LDAP database. The key buttons ‘add’, ‘modify’ or ‘remove’ entries in the database are left out on the LDAP Directory tab page.

The key buttons  “Multi-Criteria”,  “Back” and  “Back to Start” are available on the LDAP Directory tab page.

The ‘forward’ key buttons are:

	Call the person selected in the browse window (“Phone”)
	Call the first forward number for the person selected in the browse window (“forward1”)
	Call the second forward number for the person selected in the browse window (“forward2”)
	Call the mobile number for the person selected in the browse window (“Mobile”)
	Take a note of a number to dial during a phone call
	Forward the caller to a voice mailbox using the Express Messaging system
	Send a phone call notification by Email to the first Email address of the person selected in the browse window (“Email1”)
	Send a phone call notification by Email to the second Email address of the person selected in the browse window (“Email2”)
	Open the calendar of the looked-up person.

The ‘forward’ keys act on the person in focus in the directory of the displayed tab page.

Some ‘forward’ key buttons need database input to be able to function.

These forward keys are supported for persons present in the LDAP database in case the configuration is correct and complete. A correct and complete configuration for a ‘forward’ key means the key-associated local repository field is mapped to a LDAP field and this mapped LDAP field is displayed in the directory part of the LDAP Directory tab page.

An example for a configuration of the ‘E-mail’ key:

Let us suppose that ‘MAIL’ is the LDAP Directory field mapped to the local repository ‘Email1’ column and this field ‘MAIL’ is displayed in the directory part of the LDAP Directory tab page. Pressing the ‘Email1’ key will then cause Smile to create a new mail addressed to the person

in focus in the directory. The e-mail address of this person is picked up from the entry in the 'Email1' column when working on the local repository or the 'MAIL' field when working in the LDAP Directory tab page.

A filter specified at configuration, can be used to limit the scope of the LDAP functionality (look up functionality as well as update) to a subset of the complete LDAP database. The filter can consist of an addition of requirements on LDAP fields. Only equations are allowed as field-requirement. How to set and use this filter is explained in section 5.2.3 step 1.

No specific performance requirements could be set forward for the LDAP functions since these are highly dependent on the network performance and the size of the LDAP database.

## 5.2.2 Installation

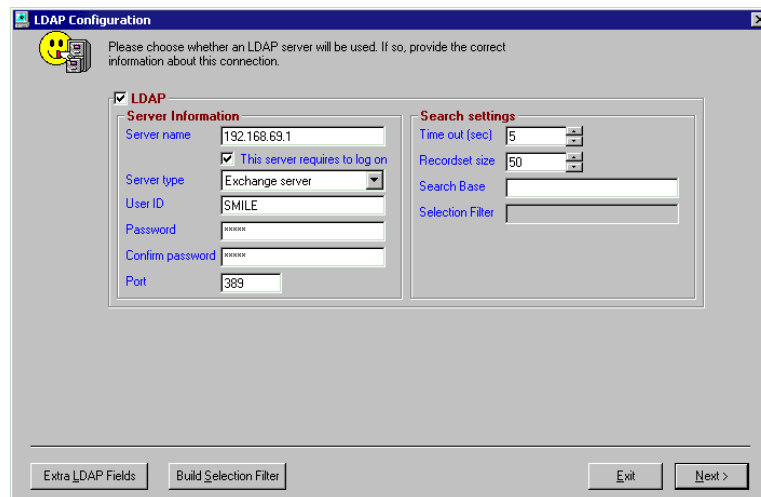
The LDAP lookup function is part of the Standard package. Therefore, all the LDAP required components are automatically installed during the Smile installation.

## 5.2.3 Configuration

The configuration of the LDAP Lookup is done by the Smile configuration utility (config.exe). It is a set of consecutive dialog boxes to be filled in by the installer, inducing the creation of an 'config.ini' file. To configure the LDAP connection, some extra dialog boxes are foreseen.

- Step 1: LDAP (LookUp) Activation

Start the Smile configuration utility (e.g.: C:\Program Files\Smile\Config.exe) and click on the <Next> button until the 'LDAP Configuration' window appears.



LDAP Configuration

Please choose whether an LDAP server will be used. If so, provide the correct information about this connection.

LDAP

**Server Information**

Server name: 192.168.69.1

This server requires to log on

Server type: Exchange server

User ID: SMILE

Password: [REDACTED]

Confirm password: [REDACTED]

Port: 389

**Search settings**

Time out (sec): 5

Recordset size: 50

Search Base: [REDACTED]

Selection Filter: [REDACTED]

Extra LDAP Fields    Build Selection Filter    Exit    Next >

A check box 'LDAP' allows to indicate the LDAP functionality is desired. In case it is checked out, all fields of this dialog box will be greyed out and further LDAP configuration dialog boxes are not displayed.

The “Server Information” part of this dialog box allows to specify the LDAP server.

This part will have to be filled in correctly in order to activate the LDAP features:

- Server name: in this field you have to enter the name of your LDAP server or its IP address.
- This server requires to log on: if anonymous access is denied on your LDAP server, you have to check this checkbox and enter the User ID and Password that have to be used for the LDAP connection.
- Server type: used to specify the type of the LDAP server
- Port: here you have to enter the TCP port that is used to access your LDAP server. The default LDAP port is 389

Note that the user should have read access to the LDAP server. The password will be encrypted and stored in the config.ini file.

The “Search settings” part of the “LDAP Configuration” dialog box contains specifications of the LDAP connection.

These include the following edit fields:

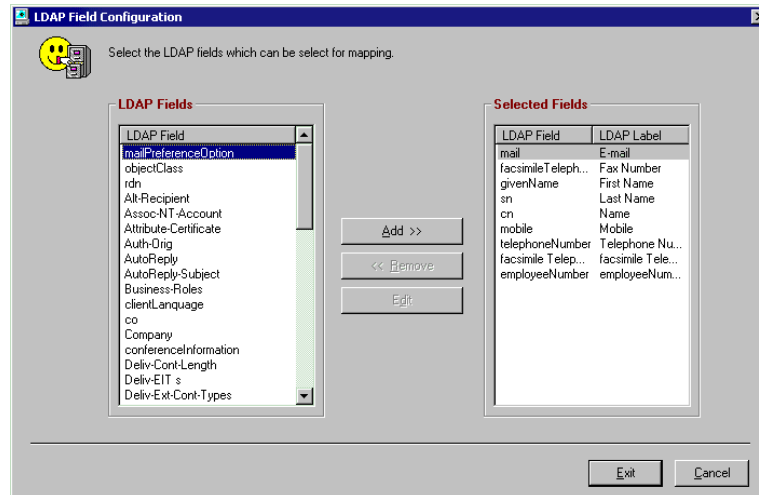
- Time Out (sec): indicating the time the application will wait for the LDAP to respond to a query. It can range from 5 to 60 seconds.
- Recordset size: a positive integer number indicating how many records the system should maximally download in one time from the LDAP server if more than one match is found. The number can range between 50 and 1000.
- Search Base: default LDAP filter. It can be used to limit the LDAP query to a part of the LDAP directory. This filter is not mandatory and will be included in all queries to the LDAP server. If it is not filled in, the Smile application will query the whole LDAP directory. By default, the filter will be blank.  
Only filter conditions of the form ‘field=value’ are allowed, the use of wildcards is not supported. Addition of filter conditions is possible. (e.g. “Department=‘Sales’ + City=‘Brussels’” is allowed but “Phone like ‘02/\*’” is not.). The filter must be typed in by hand.
- Selection filter: This is an extra filter used by the LDAP LookUp feature. Using the <Build Selection Filter> button fills it in (Refer to Step 3: Build Selection filter).

These parameters can strongly influence the performance of the connection.

The LDAP performance will strongly depend on the technical environment (e.g. speed of the network communication) and the scope of the application (e.g. size of the database).

Click on the <Extra LDAP fields> button to specify the list of the LDAP server database fields that will be used by the Smile application.

- Step 2: Extra LDAP Fields:



By default there are a certain number of fields from the LDAP directory that are automatically selected.

What are these fields used to?

You will be able to map them with the fields of the Smile database and you will be able to display these fields in the LDAP Directory tab page of the Smile application. Every field has its own LDAP label: it's this label that will be shown in the Smile interface (most of the time this label is more meaningful than the name of the field; e.g.: "Last Name" is more eloquent than "sn").

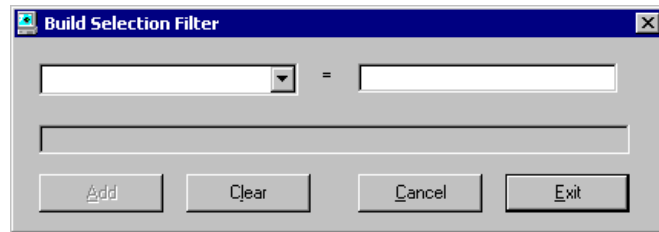
The three different actions are:

- Add: if you want to add a field to this list, you have to select the appropriate field from the LDAP Fields list and click on the <Add> button. The selected field is removed from the LDAP Fields list and is added at the bottom of the Selected Fields list.
- Remove: if you want to remove one of the selected fields, you have to select it from the Selected Fields list and to click on the <Remove> button. The field is removed from the Selected Fields list and is put at the bottom of the LDAP Fields list.
- Edit: With the <Edit> button you can edit the label that is assigned to a certain LDAP field.

Click on the <Exit> button to accept the changes and to return to the LDAP Configuration window.

Click on the <Build Selection filter> to continue.

- Step 3: Build selection filter



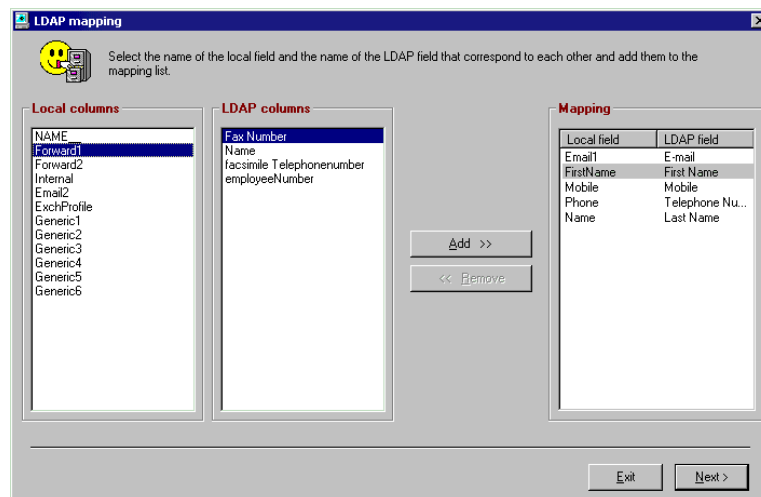
To add a new criterium to your filter, you have to select a LDAP field from the drop-down box (at the left of the equal sign) and to assign a certain value to this field (at the right of the equal sign). To validate your criterium, click on the <Add> button. If you click on the <Clear> button it will delete the complete Selection Filter.

Click on the <Exit> button to accept the changes and to return to the LDAP Configuration window. If you click on the <Cancel> button, all your modifications will be lost.

In the LDAP Configuration window, click on <Next> to continue

- Step 4: The fields mapping

Now that you have specified which LDAP fields will be used by the Smile application, you have to map these LDAP fields with the existing fields of the Smile database.



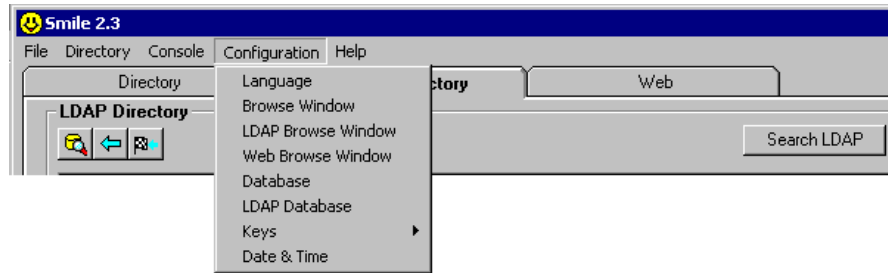
The fields mapping needs to be done in order to activate the feature of taking over conditions when switching tab pages. The 1 to 1 relation set up here is also used by the LDAP Update routine. Note that only 1 to 1 relations are possible.

The user is presented with the list of unmapped local repository columns (except the 'Name\_\_' field), a list of unmapped LDAP fields and the 'Mapping' list. The later displays the current active mappings. The <Add> and <Remove> buttons allow the user to build or change a 'Mapping' list.

Click on the <Next> button until the end of the configuration utility.

**Note:** Depending on the type of the dongle connected to the Smile workstation the LDAP Update configuration dialog box may appear. Do not activate the LDAP Update feature at this stage. The LDAP Update feature requires extra software installation. Refer to the next chapter '5.3 LDAP Update'

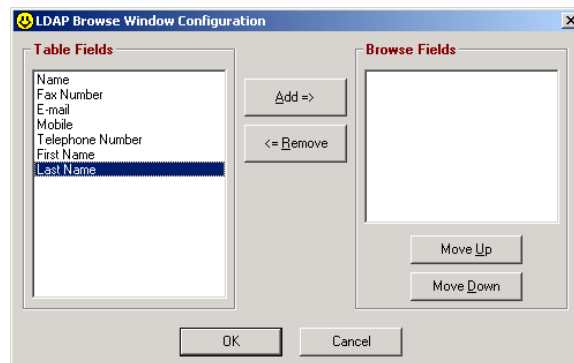
- Step 5: Complete the LDAP LookUp configuration in the Smile user interface



The LDAP LookUp configuration in the Smile user interface is accessible via the two following configuration menus:

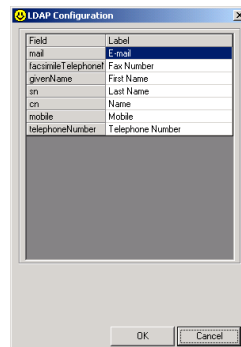
- LDAP Browse Window

It specifies the LDAP database fields that have to be displayed on the LDAP Directory tab.



- LDAP Database

It specifies the LDAP column headings.



The LDAP LookUp configuration is now finished.

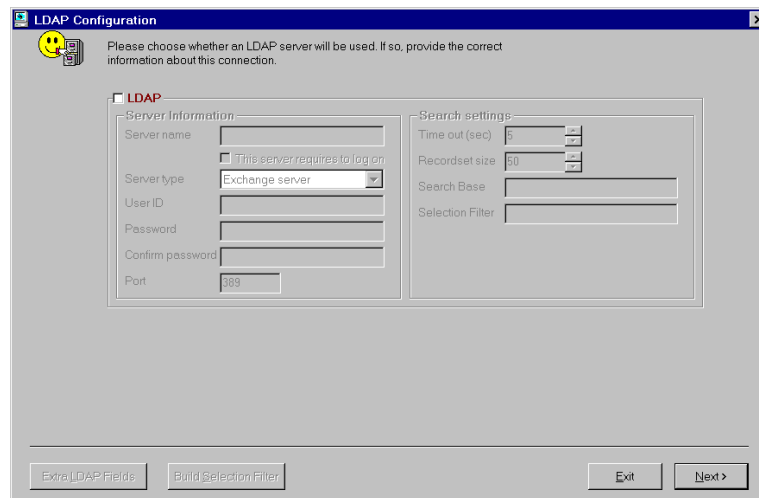
## 5.2.4 Uninstall

There is no software to uninstall.

To disable the LDAP facility, launch the Smile configuration utility and click on the <Next> button until the LDAP Configuration dialog box appears. Then deselect the check box LDAP. The LDAP configuration parameters will be greyed.

Click on the <Next> button until the end of the Smile Configuration utility.

The LDAP lookup facility is now out of service.



The image shows a screenshot of the 'LDAP Configuration' dialog box. The dialog has a title bar with the text 'LDAP Configuration' and a close button. Below the title bar, there is a smiley face icon and a message: 'Please choose whether an LDAP server will be used. If so, provide the correct information about this connection.' Below this message, there is a checkbox labeled 'LDAP' which is currently unchecked. The dialog is divided into two main sections: 'Server Information' and 'Search settings'. The 'Server Information' section contains the following fields: 'Server name' (text box), 'Server type' (dropdown menu with 'Exchange server' selected), 'User ID' (text box), 'Password' (text box), 'Confirm password' (text box), and 'Port' (text box with '389' entered). There is also a checkbox 'This server requires to log on' which is checked. The 'Search settings' section contains: 'Time out (sec)' (spin box with '5'), 'Recordset size' (spin box with '50'), 'Search Base' (text box), and 'Selection Filter' (text box). At the bottom of the dialog, there are four buttons: 'Extra LDAP Fields', 'Build Selection Filter', 'Exit', and 'Next >'. The 'Next >' button is highlighted, indicating it is the active button.



## 5.2.5 Troubleshooting

- During the LDAP configuration you may receive the following message box



- Check the LDAP configuration parameters (LDAP Server name or IP address, LDAP port number, etc...)
- Can you ping the LDAP server?
- Is there a network device between the Smile workstation and the LDAP server that could block the LDAP port (389)?
- Is the LDAP protocol activated on the LDAP Server?
- Is it possible to check the LDAP connection with another installed application like MS Outlook Express?
- The result of the LDAP queries is empty, 0 record downloaded
  - Check the Search Base and Build Selection filters
  - Check the Search Directory criterion

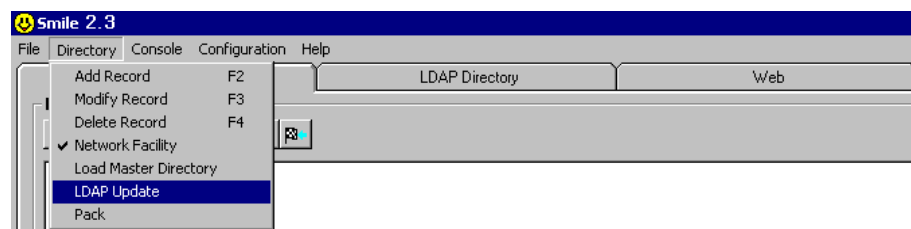
## 5.3 LDAP UPDATE

### 5.3.1 Introduction

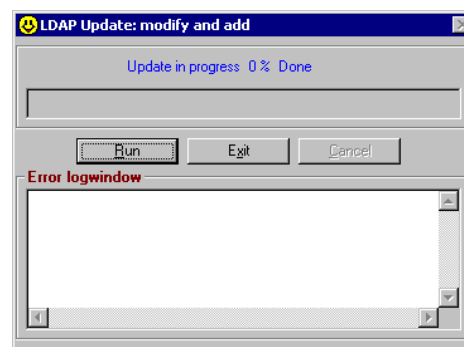
The LDAP Update functionality gives you the possibility to update the content of your local Smile database with the information retrieved from the LDAP directory. Running it on a daily base strongly simplifies the maintenance of information. This function is optional and will only be available in case the correct dongle is foreseen (Advanced, Premium or VIP) and when working on the Master Smile Console (Console Id=00). Only operators with administrator rights can activate the LDAP Update.

There are three different ways to launch the update process:

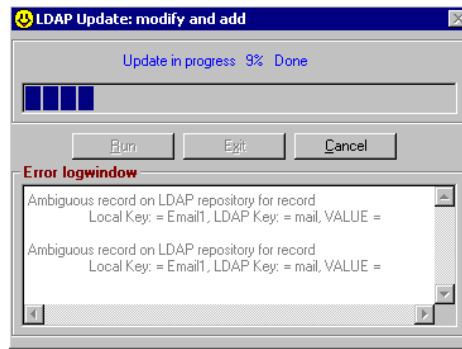
- Automatic update: It is possible to include the LDAP update process in the midnight routine of Smile. This means that the update will be done every day at a specific time.
- Manual update from the Smile user interface: You can launch the LDAP update process manually at any time. This is done by selecting the LDAP Update item from the Directory menu. This requires to be identified as Administrator on the Master Smile console.



The LDAP Update dialog box appears.



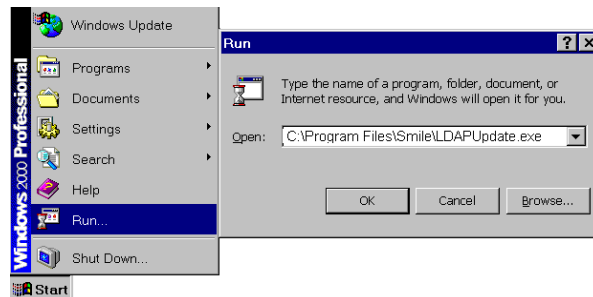
Click on the <Run> button to start the LDAP Update routine.



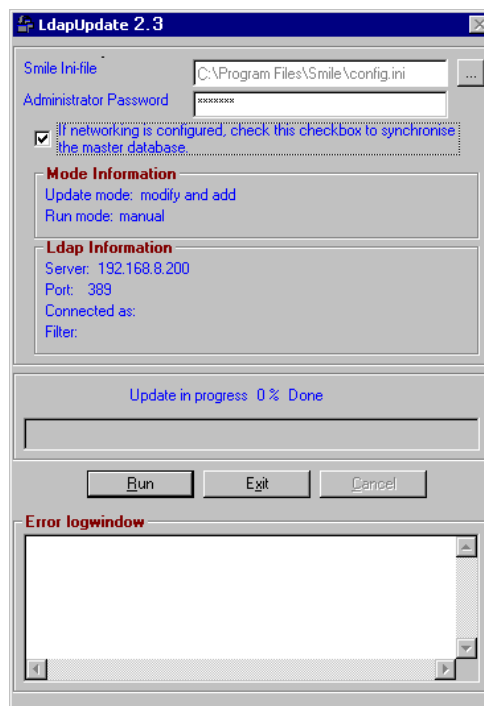
A progress bar will indicate the evolution of the process and the update issues will be displayed in the Error log window.

- Manual update by launching the LDAP Update executable:

During the LDAP Update installation a new executable file called LDAPUpdate.exe is copied into the LDAP Update application directory.

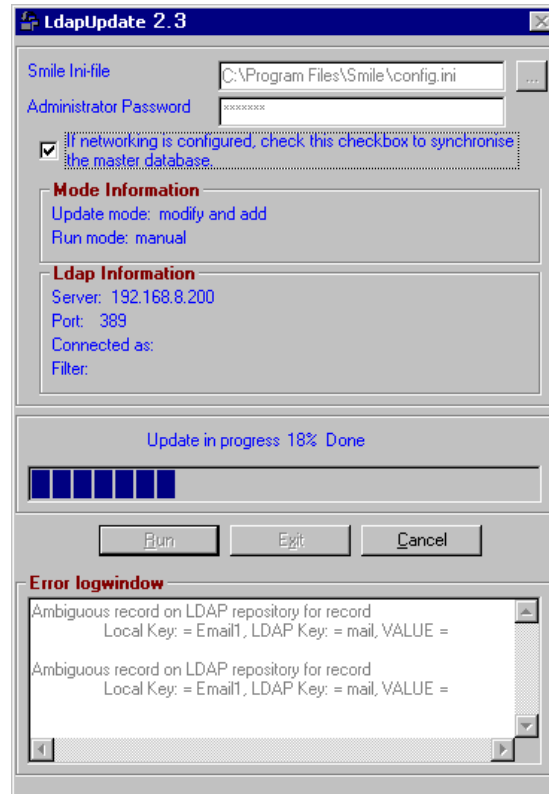


When you launch the LDAPUpdate.exe file a new window appears



You will have to provide :

- the location of the Smile configuration file (config.ini) located in the Smile application directory.
- the Administrator Password of the Smile
- specify if the Network facility has been activated



Click on the <Run> button to start the LDAP Update routine.

A progress bar will indicate the evolution of the process and the update issues will be displayed in the Error log window.

Note that it is also possible to schedule the LDAP Update execution with the Microsoft Windows task scheduler.

The Run command will look like:

**"C:\Program Files\Smile\LDAPUpdate.exe" /run c:\Program Files\Smile\config.ini MANAGER**

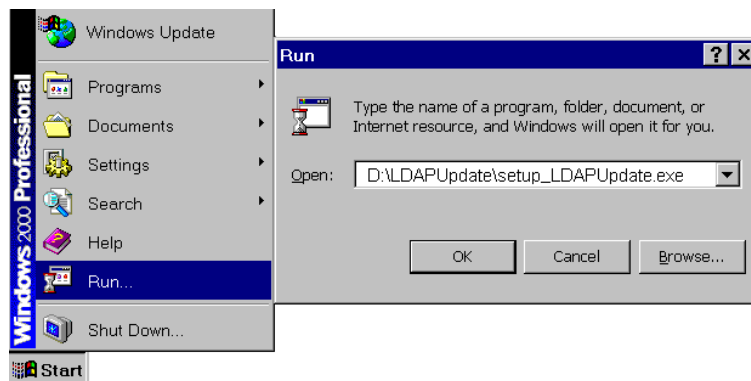
(à vérifier)

### 5.3.2 Installation

- Step 1: Starting the installation

When installing on Windows NT systems (Windows NT4, Windows 2000 Prof. and Windows XP Prof.), make sure that all steps are done with an administrative account.

It is recommended to exit all the other Windows programs before starting the installation. Insert the Smile CD-ROM and start the Setup\_LDAPUpdate.exe located in the LDAPUpdate directory.



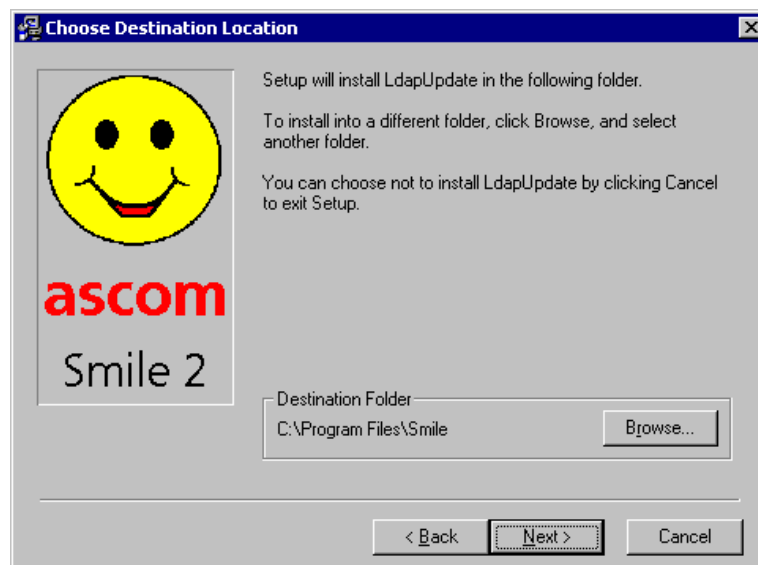
If needed, adapt the CD-ROM drive letter d: to match your PC configuration.

- Step 2: The Welcome message appears



Click <Next> to continue.

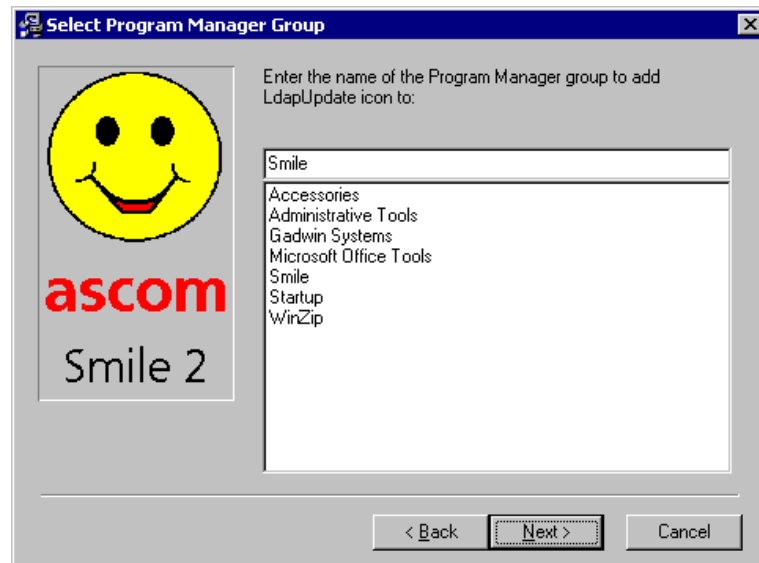
- Step 3: Choose the directory where you want to install the LDAPUpdate program



By default the program will be installed in 'C:\Program Files\Smile'.  
Click on the <Browse> button if you want to install it in another folder.

Click <Next> to continue.

- Step 4: Specify the program group where you want to add the LDAPUpdate icon



By default the 'Smile' is selected.

If you want, you can select an existing folder or create a new one by entering the name of the new program group.

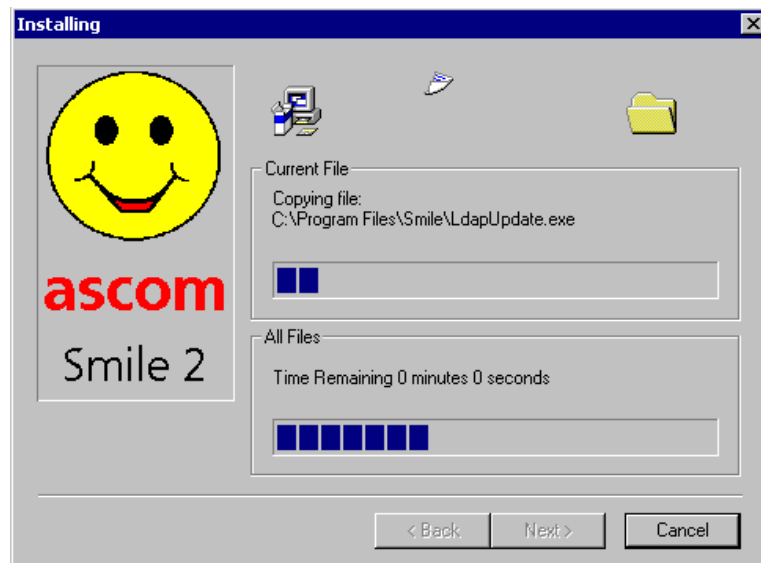
Click <Next> to proceed with the installation.

- Step 5: The installation program has now collected all the necessary information and is ready to start

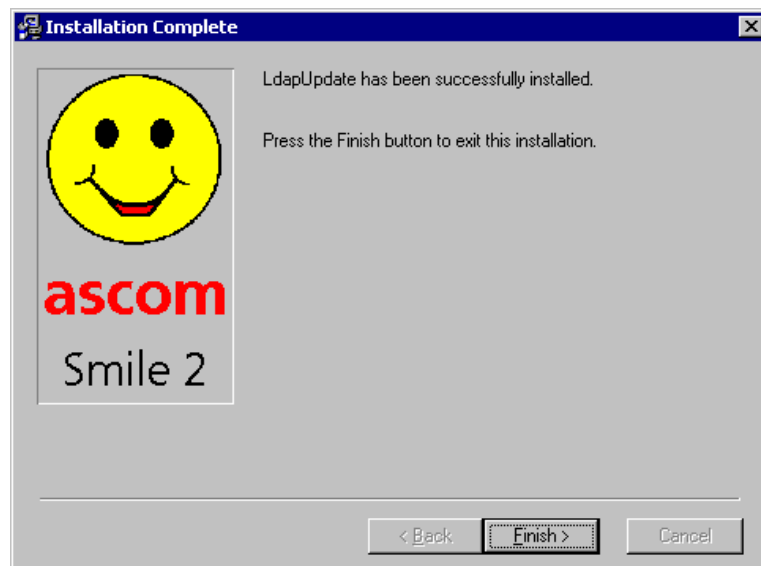


Click <Next> to continue.

All the files are now copied to the hard disk.



- Step 6: At the end of the installation you will see the following dialog box



The LDAPUpdate program has been successfully been installed on your computer.

Click <Finish> to complete the installation.

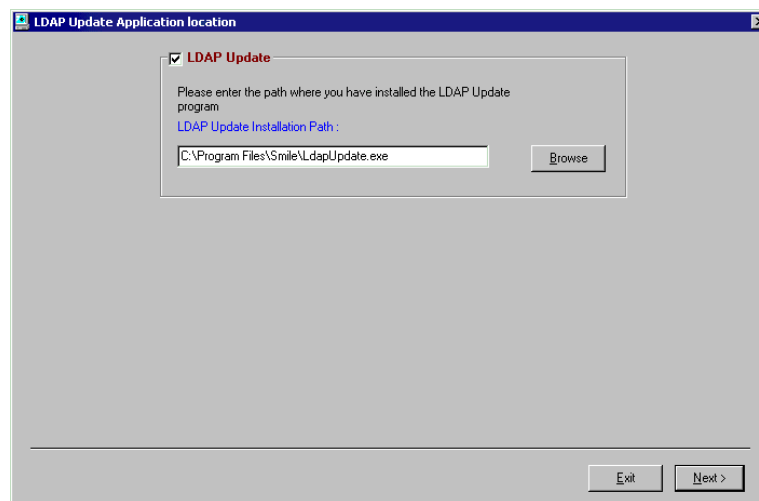


### 5.3.3 Configuration

Once a LDAP LookUp facility has been set up correctly (Refer to chapter 5.2.3), one can configure the LDAP Update facility. This is done by the Smile configuration utility (config.exe).

- Step 1: LDAP Update activation

Assuming that the LDAP LookUp configuration has been done, start the Smile configuration utility (e.g.: C:\Program Files\Smile\Config.exe) and click on the <Next> button until the 'LDAP Update Application location' window appears.



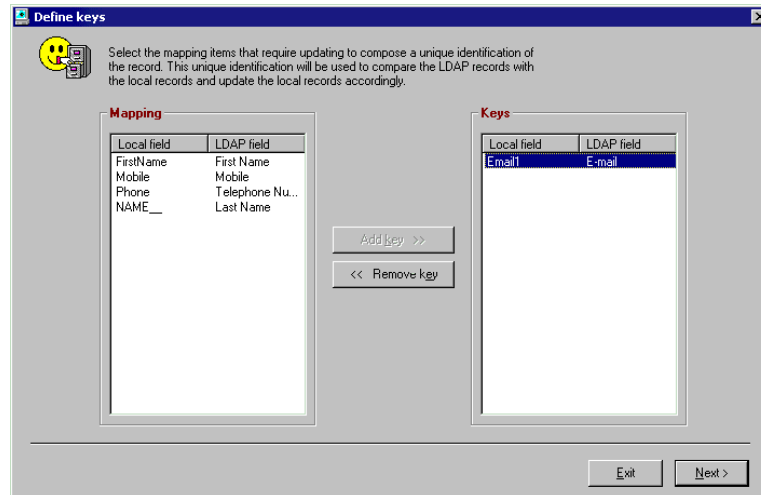
Here you have to specify where the LDAP Update utility has been installed on your computer. You can use the <Browse> button to locate the LDAPUpdate.exe file or you can enter it by typing the complete path.

Note: The LDAPUpdate program must be installed on the Master Smile console. If you want to combine the LDAP Update and the Networking feature, you have to install and to configure LDAPUpdate only once (i.e. on the Master Smile Console)

Click <Next> to continue.

- Step 2: Keys definition

To be able to do the update between the LDAP directory and the Smile database, you have to define a unique key. This unique key (set of key fields) will identify the matching records.

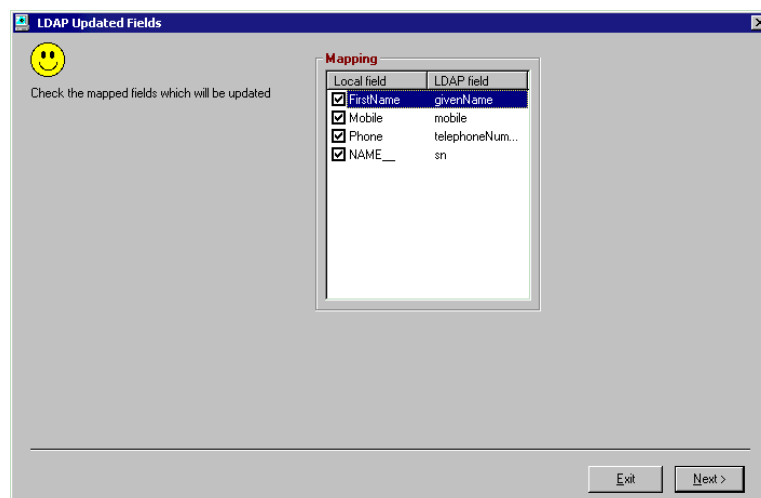


In the Mapping list, you find the list of all the mappings that you made in one of the previous steps (LDAP LookUp Configuration Step 4). The key that will be used for the update mechanism can consist of one single mapping or a combination of several mappings. From the Mapping list you have to select each of the mappings that you want to use and click <Add key> button. If you made a mistake, you can always remove one of the keys by selecting it from the Keys list and by clicking the <Remove key>.

Click <Next> to continue.

- Step 3: Fields to be updated

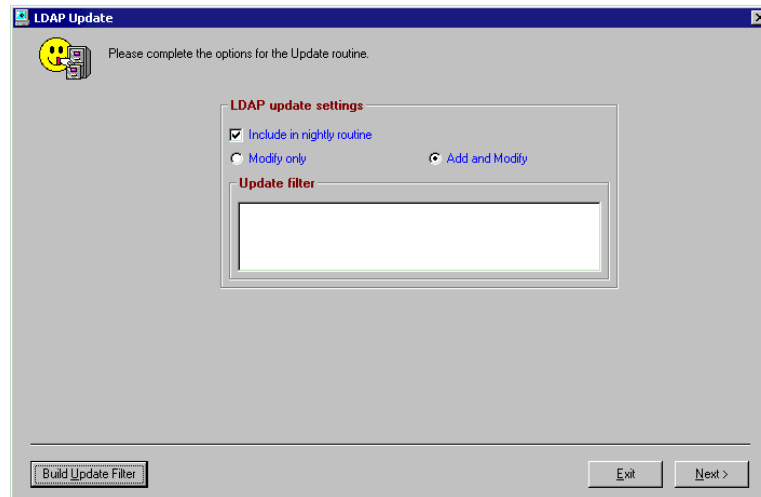
Now you have to specify which fields must be updated during the LDAP Update process.



In the Mapping list you have to select the fields that you want to update during the LDAP Update process by checking the corresponding checkbox. Notice that the field(s) that you defined as a key in the previous step are not present in this list anymore.

Click <Next> to continue.

- Step 4: LDAP Update settings

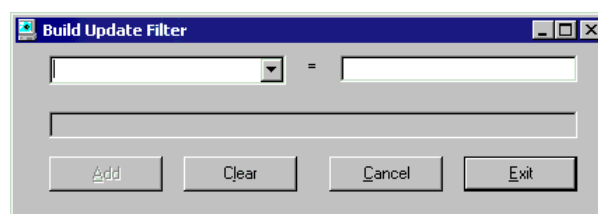


If you want to include the LDAP Update process into the Smile MidNight routine, you have to select the checkbox Include in nightly routine.

You can also specify in which mode you want to run the LDAP Update process:

- Modify Only: the Smile application will only update the records that are already present in the local database.
- Add and Modify: the Smile application will update the records that are already present in the local database, but will also add all the new records that are found in the LDAP directory and that are not yet present in the local database.

In this dialog box, there is also a <Build Update Filter> button. If you click this button, the following dialog box appears:



The Build Update Filter will help you to limit the scope of the LDAP records. It is used by the LDAP Update process only.

To add a new criterium to your filter, you have to select a LDAP field from the drop-down box (at the left of the equal sign) and to assign a certain value to this field (at the right of the equal sign). To validate your criterium, click on the <Add> button. If you click on the <Clear> button it will delete the complete Update Filter.

Click <Exit> to return to the main configuration screen. If you click <Cancel> all your modifications will be lost.

The LDAP Update configuration is finished.

Click on the <Next> button until the end of the configuration utility.

### 5.3.4 LDAP Update Details

The LDAP Update feature has been set up as follows:

- The local database records are compared to LDAP database records. A match between a LDAP and local repository record is identified in case a configurable set of fields (called 'key fields') is identical. A second set of configurable fields (referenced to as 'updateable fields') of the matching records are then compared. Any difference induces a change of the local database record.

In case of ambiguity (e.g. several local database records match a given LDAP database record or vice versa) a message is sent to the LDAP Update log file (LDAP\_Update.log) and no changes concerning these records are performed. A more detailed definition of ambiguities is given later. The operator receives a message to check the LDAP Update log file at next start-up.

The specification of key fields and updateable fields is done at configuration

- The LDAP Update can run in different modes. It can either be set up to only modify records or to modify and add records. In the later case, a record is added to the local database in case it does not contain any matching record.

For the records to add to the local repository, the key fields and updateable fields are taken over. All other local repository fields are left blank (with one exception: the 'Name\_\_' column is generated automatically in case the 'First Name' and 'Name' columns are mapped).

The specification of the run mode is done at configuration and explained in section 5.3.3 Configuration Step4.

- An extra filter (Build Update Filter) allows update with a subset of the LDAP database: only records fulfilling both filter requirements (i.e. Search Base filter explained in section 5.2.3 Step1 and Build Update Filter) are taken into account. The filter can consist of an addition of field requirements. Here also, only equations are allowed as field-requirement, wildcards are not supported.

The synchronisation filter if any must be specified at configuration. This is explained in section 5.3.3 step 4.

- The LDAP Update function will never remove records from the local database.

An extra field is added to the local repository MS Access database to contain the time stamp of last 'match' (i.e. the day, month and year of start-up of the LDAP Update routine). A 'match' meaning the LDAP Update routine has found a 1 to 1 match between a local repository record and a record in the LDAP database. Note that in case of ambiguity (N to 1, 1 to N or N to N relation), the time stamp will not be altered.

In case running in 'Add and Modify' mode, the added records will also get the new time stamp.

This time stamp will allow an easy clean up of the local repository (i.e. manual deletion of fields for which the time stamp has not changed for some time). The clean up of the local repository has to be done with MS Access, on a regular base, by the system administrator.

- A check box on the 'LDAP Update' dialog box (in the Smile configuration utility) allows to include the synchronisation function in the midnight routine allowing automatic update of the local repository on a daily base.  
A Manual start-up of the routine on the main console is also foreseen: the menu item 'LDAP Update' is added under the 'Directory' item of the Smile menu. It will be enabled on the Master Smile Console (console Id = 00) in case the operator has administrator rights and the dongle type is correct (Advanced, Premium or VIP).  
A double click on the executable in the explorer will also start the synchronisation routine. A login box will assure only the administrator can start the routine. Also here, the dongle code and console ID are checked.  
A short statistical summary of the synchronisation will in all cases be added to the Smile log file (logfile.txt).
- A message box will be displayed at next start-up in case the synchronisation routine encountered problems (see below for the definition of 'Problems'). The message will refer to the synchronisation log file for more details.
- The LDAP Update routine will generate a detailed logging and a statistical summary.  
The statistical overview contains the following information:
  - the time of start of execution and the time of end of execution
  - the run mode and applied filter
  - the number of records modified in the local repository
  - the number of records added to the local repository
  - the number of problems (ambiguities)
  - the number of records in the local database without match in the LDAP database.This statistical overview is added to the Smile log file in case the update is started. It is also added at the end of the detailed LDAP Update log file.  
A separate LDAP Update log (LDAP\_update.log placed in the same directory as the executable) is generated in overwrite mode and will contain details (key field information) on encountered problems. The statistical log is added at the end of this file.
- LDAP Update routine ambiguity are defined as:
  - several local repository records matching the key values and at least one LDAP record matching the key values
  - several LDAP records matching the key values and at least one local repository record matching the key value
  - In case run-mode is 'Modify only', the following situation is also classified as problem: LDAP records that have no matching local repository record. (These records are added to the local repository in case the synchronisation runs in 'Add and Modify' mode).

The message in the LDAP Update log file indicating ambiguous records will look as follows: "Ambiguous record for key fields: <Key values>; Nr.of LDAP records: <#ldap>, Nr.of local records: <#loc>." where <Key values> is replaced by a comma separated list of key values, <#ldap> (<#loc>) by the number of LDAP (local database) records satisfying the key values. This number can be '0', '1' or '>1'.

The following table displays the possible combinations of number of local repository records matching the key values (#Loc) and number of LDAP records matching the key values (#LDAP). For each combination, the number of records modified in (#mod) or added to (#add) the local repository and the number of problems written to the log file (#prob) are displayed. The numbers are displayed for the synchronisation run in 'Add and Modify' mode and 'Modify only' mode. The table also indicates whether or not the time stamp is updated (Time upd = Yes or No). N indicates any integer number larger than 1.

#Loc	#LDAP	'Add and Modify'		'Modify only'	
		Action	Time upd	Action	Time upd
0	1	Add	Yes	Problem	No
0	N	Problem	No	Problem	No
1	0	/	No	/	No
1	1	Update	Yes	Update	Yes
1	N	Problem	No	Problem	No
N	0	/	No	/	No
N	1	Problem	No	Problem	No
N	N	Problem	No	Problem	No

### 5.3.5 Definition of 'Mapped fields'

A local repository column 'A' and an LDAP field 'X' are referred to as 'Mapped fields' if the one to one relation 'A mapped with X' between the local repository column and LDAP field exists.

These one to one relations are defined at configuration (see sec 5.3.3). They are listed in the 'Mapping' list of the "LDAP mapping" dialog box.

The following states an example to clarify the expressions:

Lets say 'Name', 'First Name', 'Phone', 'Mobile Phone', 'E-mail', 'Project' and 'Sub-Division' are columns in the local database and 'FIRST NAME', 'NAME', 'TEL', 'CONTRY', 'MAIL', 'MAIL2' and 'COMPANY' are LDAP database fields.

The following relations could then define a mapping: 'Name mapped with NAME', 'First Name mapped with FIRST NAME', 'Phone mapped with TEL' and 'E-mail mapped with MAIL'.

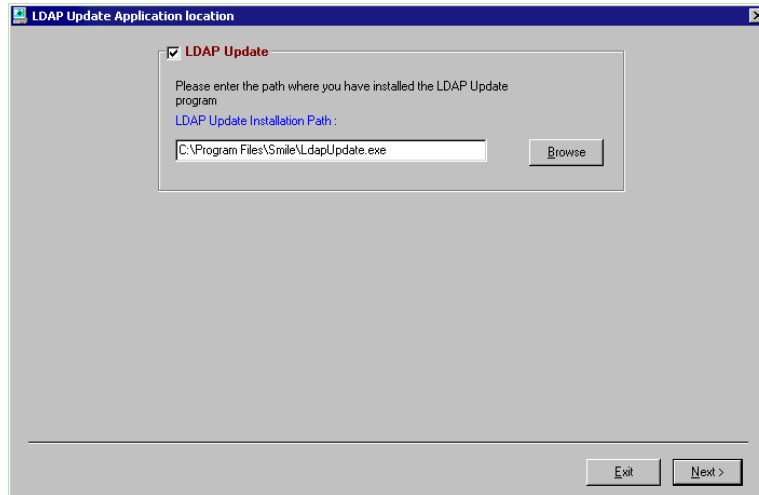
We say 'Name' and 'NAME' are mapped fields. The same is true for 'First Name' and 'FIRST NAME', 'Phone' and 'TEL', 'E-mail' and 'MAIL'. No mapping field is available for 'Mobile Phone', 'Project', 'Sub-Division', 'CONTRY', 'MAIL2' and 'COMPANY'.

Notice that only 1 to 1 relations are possible in a mapping, i.e. the relations 'A mapped with X' and 'A mapped with Y' can never be part of the same mapping. A field already used to map with another field cannot be used twice as map criteria for a new field. In the example given above, the additional relation 'E-mail mapped with MAIL2' or 'Mobile Phone mapped with TEL' can not be added to the mapping.

### 5.3.6 UnInstall

- Step 1: Disable the LDAP Update facility

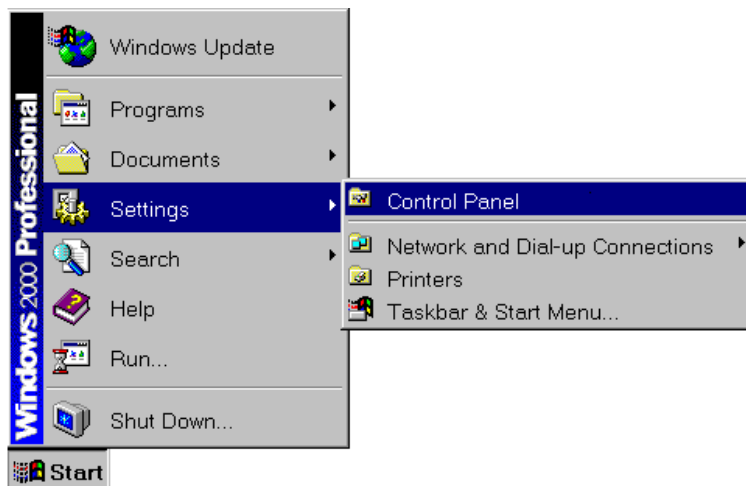
Start the Smile configuration utility (e.g.: C:\Program Files\Smile\Config.exe) and click on the <Next> button until the 'LDAP Update Application location' window appears.



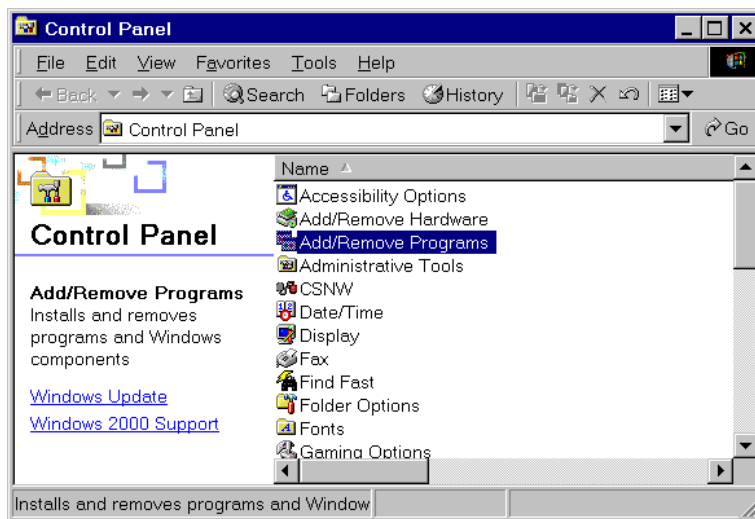
Deselect the checkbox LDAP Update. The configuration parameters are now greyed. Click on the <Next> button until the end of the Smile configuration utility.

- Step 2: Open the Control Panel

When uninstalling on Windows NT systems (Windows NT4, Windows 2000 Prof. and Windows XP Prof.), make sure that all steps are done with an administrative account.

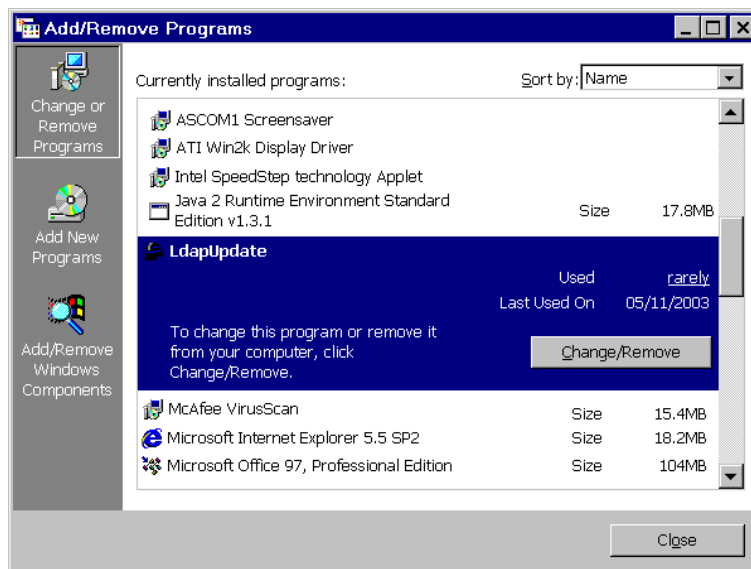


- Step 2: Open the 'Add/Remove Programs' window



Double click on the item 'Add/Remove Programs'

- Step 3: Select the LDAP Update program

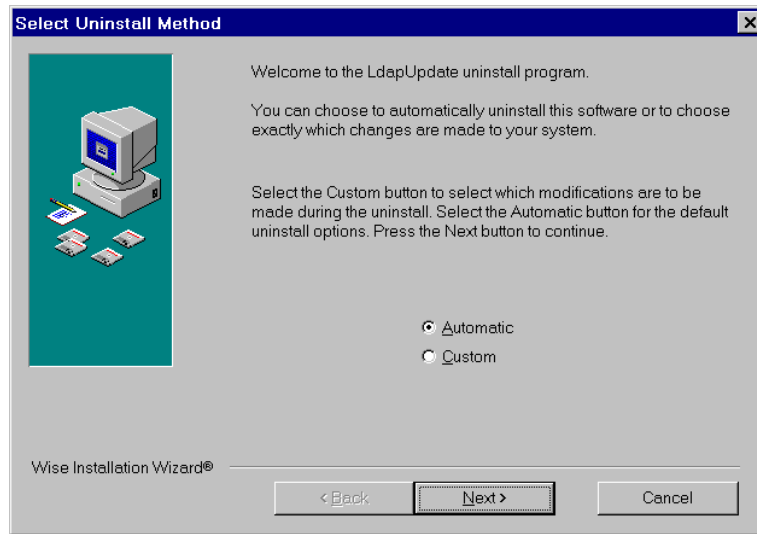


Select the LDAP Update program.

Click on the <Change/Remove> button to continue.

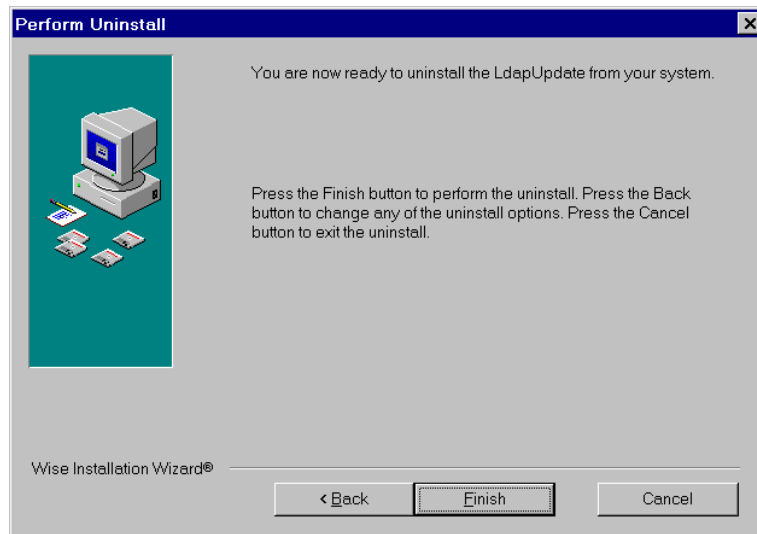


- Step 4: Select the Uninstall Method



Select the Automatic uninstall method and click on the <Next> button to continue.

- Step 5: Confirm the uninstall



Click on the <Finish> button to start the uninstall.

- Step 6: Close the Add/Remove Program window

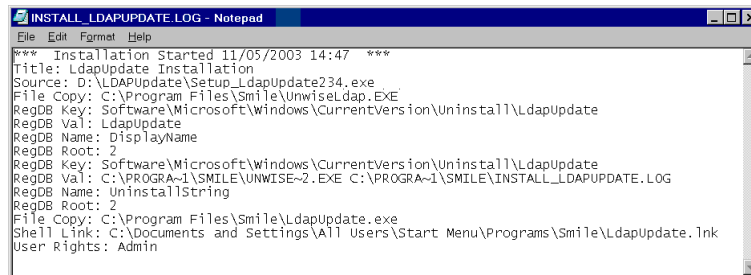
Click <Close> to close the Add/Remove Program window then close the Control Panel

### 5.3.7 Troubleshooting

- LDAP Update installation problem:

During the installation process, the Wise installer creates a log file called Install\_LDAPUpdate.Log. It will help you to fix the problem.

Below is a sample installation log file:



```

INSTALL_LDAPUPDATE.LOG - Notepad
File Edit Format Help
*** Installation Started 11/05/2003 14:47 ***
Title: LdapUpdate Installation
Source: D:\LDAPUpdate\Setup_LdapUpdate234.exe
File Copy: C:\Program Files\Smile\UnwiseLdap.EXE
RegDB Key: Software\Microsoft\Windows\CurrentVersion\Uninstall\LdapUpdate
RegDB Val: LdapUpdate
RegDB Name: DisplayName
RegDB Root: 2
RegDB Key: Software\Microsoft\Windows\CurrentVersion\Uninstall\LdapUpdate
RegDB Val: C:\PROGRA~1\SMILE\UNWISE~2.EXE C:\PROGRA~1\SMILE\INSTALL_LDAPUPDATE.LOG
RegDB Name: UninstallString
RegDB Root: 2
File Copy: C:\Program Files\Smile\LdapUpdate.exe
Shell Link: C:\Documents and Settings\All Users\Start Menu\Programs\Smile\LdapUpdate.lnk
User Rights: Admin
    
```

- The LDAPUpdate configuration window does not appear in the Smile configuration utility

It means that the Smile configuration utility does not detect an appropriate dongle

- check if a Smile dongle is connected to the Smile workstation
- check the type of the dongle (Advanced, Premium or VIP).
- check if the Secure sentinel driver (dongle driver) has been installed

The LDAP Update can only run on the Master Smile Console

- check the Console ID

- Problem with the updated records

A separate LDAPUpdate log file (LDAP\_update.log located in the same directory as the LDAPUpdate executable) is generated in overwrite mode and will contain details (key field information) on encountered problems. The statistical log is added at the end of this file.

The message in the LDAP Update log file indicating ambiguous records will look as follows: "Ambiguous record for key fields: <Key values>; Nr.of LDAP records: <#ldap>, Nr.of local records: <#loc>." where <Key values> is replaced by a comma separated list of key values, <#ldap> (<#loc>) by the number of LDAP (local database) records satisfying the key values. This number can be '0', '1' or '>1'.

## 6 E-mails

---

### 6.1 INTRODUCTION

This chapter describes the features available in the Premium package of the Smile.

It offers the following features:

- The Personal Notes functionality

The employees of a company can send a mail to a predefined Smile e-mail account (e.g.: Smile@company.com), with a short message. This message will appear on the Smile interface in the 'Personal Notes' field. The notes are specific to each person stored in the repository and show up when this particular person is filtered out.

(Requires a POP3 compliant e-mail server and a dedicated Smile mailbox)

- The Send Mail functionality

The operator can send a mail to the person in focus assuming that his e-mail address has been filled in.

(Requires a SMTP compliant e-mail server)

- The Open Calendar functionality:

The operator can open the agenda of a looked-up person in the local repository, when clicking the <Calendar> button. This way the operator can verify the person's agenda.

(Requires MS Outlook)

The new Premium package of the Smile is supported on the following platforms:

- MS Windows 98, 2nd Edition (No Personal Notes functionality)
- MS Windows NT 4.0 with SP 6
- MS Windows 2000 Prof. with SP 2
- MS Windows XP Prof.

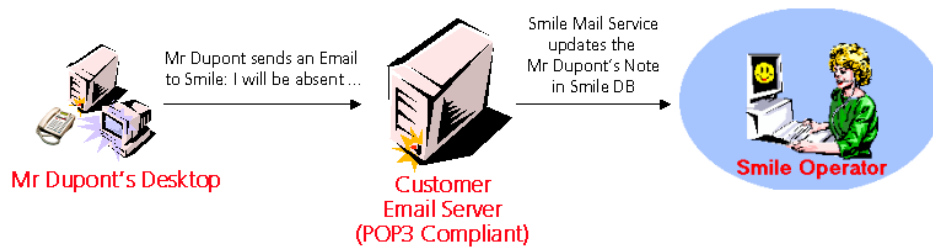
These operating systems have to be properly installed and configured to operate normally in a network environment. The Personal Notes feature is not supported on MS Windows 98.

The Premium features only work properly if a Premium dongle is attached to the parallel port of the Smile workstation.

## 6.2 THE PERSONAL NOTES FACILITY

### 6.2.1 Description

The employees of a company can send a mail to a predefined e-mail account, with a short message. This message will appear in the Smile interface, and more specifically in the 'notes'- field, that is split up into an 'Operator Notes'-field (containing brief notes of the operator) and a 'Personal Notes'-field (containing the short message sent by e-mail). The notes are specific to each person stored in the repository, and show up when this particular person is filtered out.

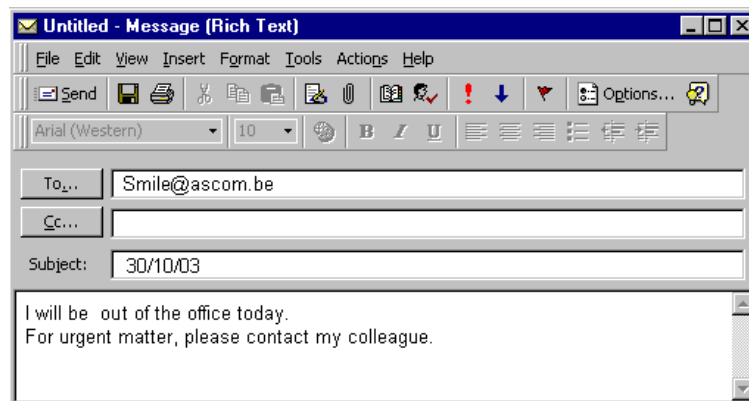


### 6.2.2 The sending of a personal note

Anyone within the company can send an e-mail to a predefined and configurable Smile e-mail account (e.g.: [smile@company.com](mailto:smile@company.com)).

- In the From-field, the e-mail address of the person.
- In the To-field, the special Smile e-mail account has to be filled in.
- In the Subject-field, the optional expiration date of the personal note is mentioned. The Regional settings (Short Date format) of the Master Smile Console will determine the expiration date format (e.g.: dd/mm/yy or mm/dd/yy)
- The body of the message contains a personal note of the person. From this note only the first 255 characters will be captured by the Smile application and stored in the repository. The remaining characters (if any) are not read.

The personal notes must be sent in a plain text mail message, without attachments (to shield from viruses).



## 6.2.3 The reception of a personal note by the Smile application

### 6.2.3.1 MAIL RECEPTION FUNCTIONALITY ON MASTER SMILE CONSOLE

The mail reception functionality is exclusively implemented on the Master Smile console (Console ID=0), and works with a POP3 compliant e-mail server (MS Exchange Server, Lotus Notes, Netscape Messenger, etc...)

At regular intervals (set in the config.ini), Master Smile console will check, via POP3, the mail server for incoming mail. The Smile e-mail account data (as defined in the config.ini) is used to establish this connection.

This regular check for incoming mail is implemented as a service, running in the background, with the security based on the presence of the appropriate 'Premium' dongle. A service is a program, routine or process that performs a specific systems function to support other programs, in most cases at a level close to the hardware level.

### 6.2.3.2 PROCESSING OF NEW MAIL

If a mail arrives, the following actions occur:

- in the repository of the Master Smile console, a matching e-mail address is looked up
- if a matching e-mail address is found (the E-mail1 and E-mail2 addresses are searched) Smile will start to copy the data into the local repository
- the first 255 characters of the body of the e-mail message are copied into the 'personalnote'-field of the repository
- the current date and time are filled in the 'rcvdatenote'-field of the repository
- the subject field of the e-mail is parsed for a valid date, which will be filled in the 'expdatenote'-field of the repository
- the processed mail is removed from the mail server

For each person held in the repository, only the most recent personal note persists. Older notes are deleted without archiving.

The expiration date contained in the subject-field is interpreted following the regional settings of the Master Smile console. The subject-field may contain no other information. The deletion of the expired personal note occurs during the Smile Mail Service midnight routine (every day at 00:00:00 by default).

If the same person sends several notes in a short period of time, it is possible that the notes arrive in another order than the one they were sent to. This is due to the network design. Smile cannot account for this particularity.

If several consoles operate in a network, the received mail is propagated by the Master Smile console to the Master database, using the Smile Networking facility

If the mail contains an empty subject-field and no message in the body, this will be interpreted as a recall of the current personal note, without providing a new personal note. In the repository the expiration date-field and the personal note-field are cleared.

## 6.2.4 Errorhandling

If a connection to the mail server could not be obtained, an appropriate message could be shown to the operator depending of the LogType (See below). The operator can then take the necessary measures or even disable the regular check (e.g.: if the mail server is temporarily out of service). Otherwise Master Smile console will keep checking incoming mail as indicated in the config.ini file.

If a personal note is sent by a person whose e-mail address is not present in the repository of the Master Smile console, then a reply is sent to the e-mail originator with 'Unknown email address' filled in the subject-field.

If a personal note is sent by a person without expiration date (= an empty subject-field) or with an invalid expiration date, then the message is stored in the repository without expiration date, indicating that the message will only be overwritten by a more recent personal note, sent by the same person.

In the configuration utility, an appropriate checkbox is included with a "reply on incoming mails" label. If checked, every person sending a personal note will receive one of the two following messages:

- "Successfully updated the Personal Notes Field with the following message:  
<E-mail body>  
This message will expire on ... "
- "Successfully updated the Personal Notes Field with the following message:  
<E-mail body>  
No expire date was given."

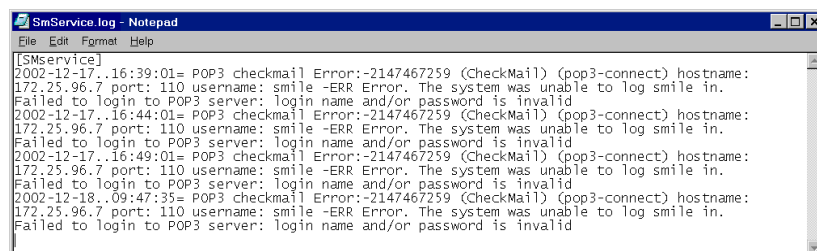
All events and errors can be logged in a specific log file called 'SmService.log' located in the Smile application directory. To activate the log file you will have to modify manually the config.ini file: prompt 'LogType' in the section [SmService]

LogType = 0: No events, no errors are logged.

LogType = 1: Events and errors are logged in the 'SmService.log' file

LogType = 2: Events and errors are logged in the 'SmService.log' file and displayed in a popup window

'SmService.log' sample file :



```
[SmService]
2002-12-17..16:39:01= POP3 checkmail Error:-2147467259 (CheckMail) (pop3-connect) hostname:
172.25.96.7 port: 110 username: smile -ERR Error. The system was unable to log smile in.
Failed to login to POP3 server: login name and/or password is invalid
2002-12-17..16:44:01= POP3 checkmail Error:-2147467259 (CheckMail) (pop3-connect) hostname:
172.25.96.7 port: 110 username: smile -ERR Error. The system was unable to log smile in.
Failed to login to POP3 server: login name and/or password is invalid
2002-12-17..16:49:01= POP3 checkmail Error:-2147467259 (CheckMail) (pop3-connect) hostname:
172.25.96.7 port: 110 username: smile -ERR Error. The system was unable to log smile in.
Failed to login to POP3 server: login name and/or password is invalid
2002-12-18..09:47:35= POP3 checkmail Error:-2147467259 (CheckMail) (pop3-connect) hostname:
172.25.96.7 port: 110 username: smile -ERR Error. The system was unable to log smile in.
Failed to login to POP3 server: login name and/or password is invalid
```

SmService Popup window:



## 6.2.5 Propagation of personal notes to other networkconsoles

When several Smile consoles are operating in a network using the Smile Networking facility, the Master Smile console will save the new Personal Notes locally and in the network repository. So that, after x minutes, all smile workstations will have the Personal Notes updates. You don't have to install the SmService on each Smile workstation, only on the Master Smile console (Console ID=0).

## 6.2.6 Display of the personal notes in the Smile interface

### 6.2.6.1 PERSONAL NOTES RESIDE IN THE LOCAL REPOSITORY

Personal notes are related to the persons stored in the local repository. When working with other repositories (LDAP, Internet, etc...) the personal notes are not shown, even if the selected person is present in the local repository.

### 6.2.6.2 OPERATOR NOTES VERSUS PERSONAL NOTES

The current 'notes'-field is now split into 2 parts:

- the left part remains the operator note
- the right part contains the latest received personal note (if any) of the person in focus

Even if the required dongle and dongle code is not detected, the notes-field will be split into 2 parts as described above. The personal notes-field will remain blank.

### 6.2.6.3 FORM OF THE PERSONAL NOTES-FIELD

The personal notes-field can hold 3 lines of each approximately 40 characters.  
The field is laid out as follows:

RCV : [receiving date] – EXP : [expiration date] Line 1 Line 2
--


If there is no personal note for the indicated person, the personal notes-field will be left completely blank.

## 6.2.7 Personal notes management

### 6.2.7.1 MANAGEMENT BY THE CONCERNED PERSON

The person can overwrite the current personal note by sending a new one, or by sending an e-mail with a blank subject-field and a blank body, to simply remove the current personal note.

### 6.2.7.2 MANAGEMENT BY THE OPERATOR

The operator can delete the current personal note for a person by clicking on the appropriate button in the toolbar  or by pressing <ALT-F7>.  
If the personal note can't be deleted (e.g.: operator hasn't edit authorization on the console), the command is disabled but still visible.

### 6.2.7.3 MANAGEMENT BY THE NIGHTLY ROUTINE

The nightly routine checks the expiration date to see if a personal note has yet expired. If so, the personal note information is deleted from the repository. The prompt 'ScheduleDeleteDateTime' in the SmService section of the config.ini file determines the next execution of the SmService midnight routine.



## 6.2.8 Installation and configuration

Before installing the Smile Mail Service, remember that the Smile mail is a true service and thus can't be installed on MS Windows 98.

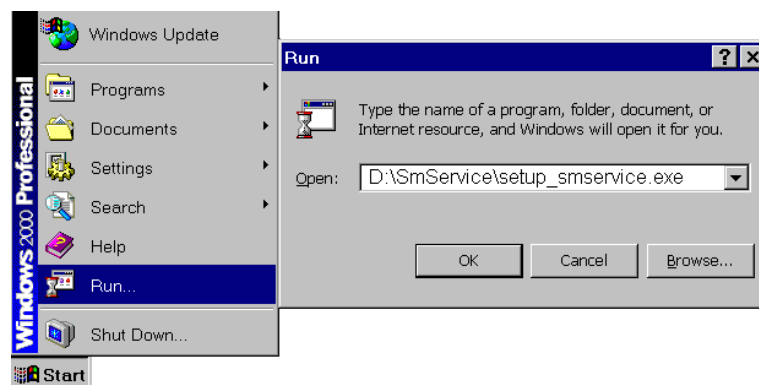
Assuming that the Smile 2.3 is already installed and operational, follow the instructions below to install and to configure the Smile Mail Service:

- Step 1: Connecting the 'Premium' Dongle

Connect the Smile Premium dongle to the parallel port of the PC and log into the workstation with administrator privilege.

- Step 2: Starting the Smile Mail Service installation

It is recommended to exit all the other Windows programs before starting the installation. Insert the Smile CD-ROM and start the Setup\_smservice.exe located in the SmService directory.



If needed, adapt the CD-ROM drive letter d: to match to your PC configuration.

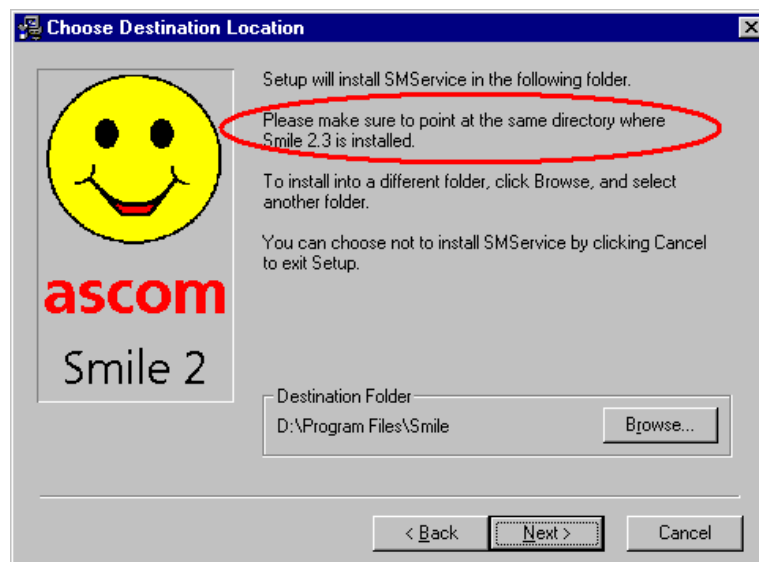
- Step 3: The Welcome window appears



Read the text and click on the <Next> button to continue.

- Step 4: Choose the directory where you want to install the SmService

The Smile Mail Service must be installed in the Smile application directory.



If needed adapt the destination folder with the <Browse> button.

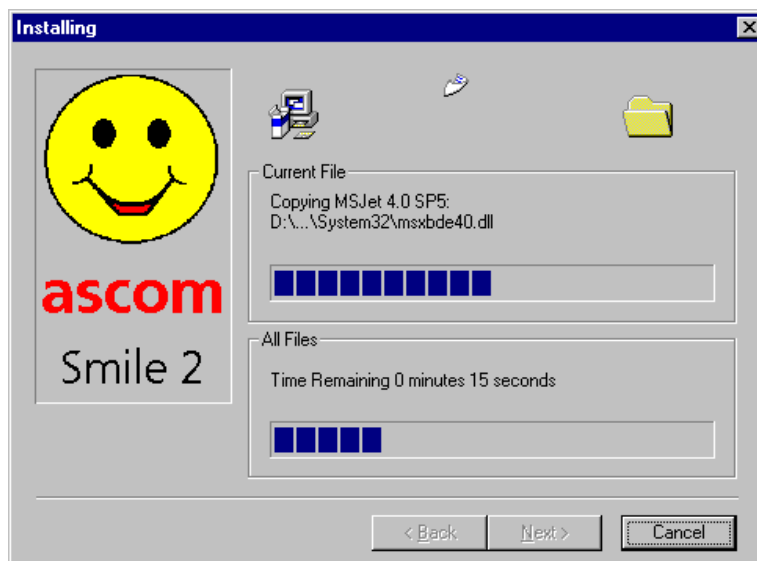
Click <Next> to continue.

- Step 5: The installation program has now collected all the necessary information and is ready to start



Click on the <Next> button to continue


All the files are now copied to the hard disk.

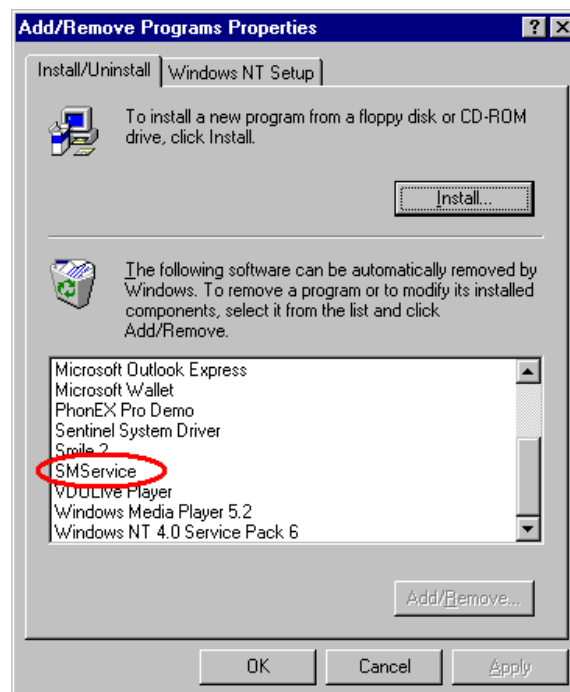


- Step 6: At the end of the installation you will see the following dialog box

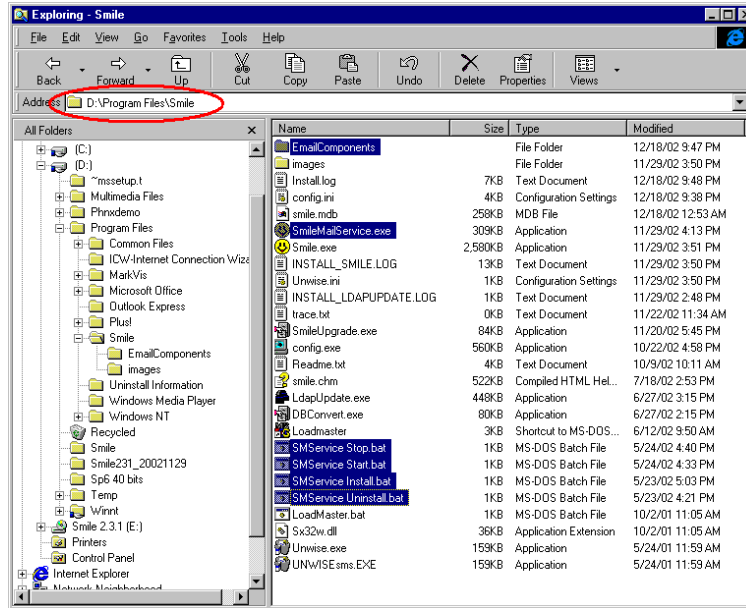


Click <Finish> to complete the installation.

The SmService has been successfully installed on your computer, it appears in the Add/Remove Programs list  of the Control Panel.

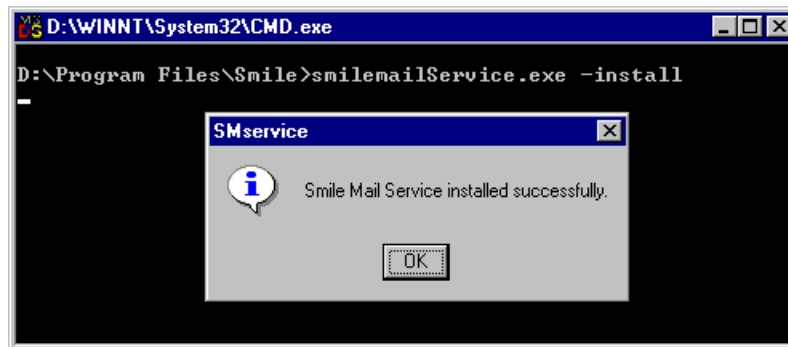


During the SmService installation some files are copied into the Smile application directory: see below



### 6.2.8.1 SMILE MAIL SERVICE ACTIVATION

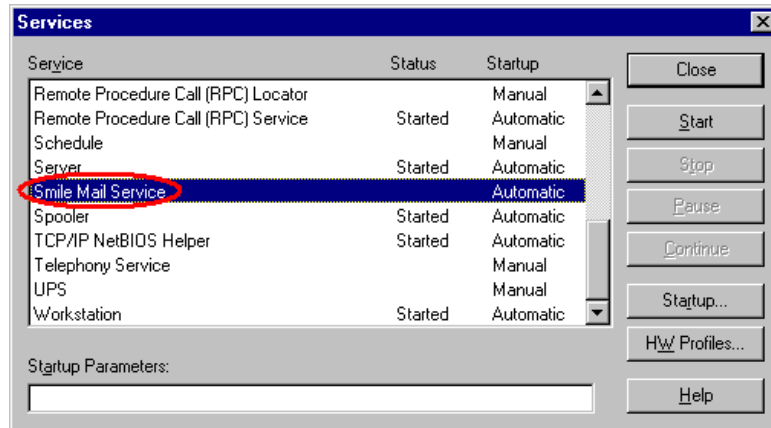
In order to activate the SmService, start the batch file 'SmService Install' located in the Smile application directory.



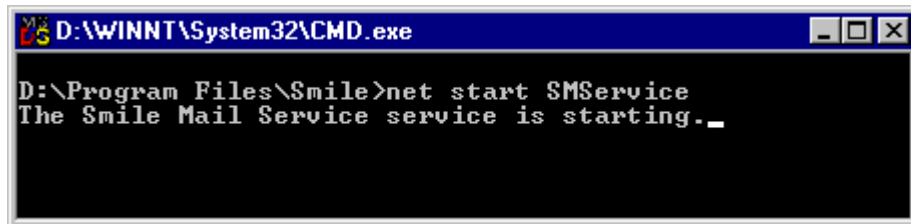
The Smile Mail Service appears in the Services list. 

Remember, to access the Services list:

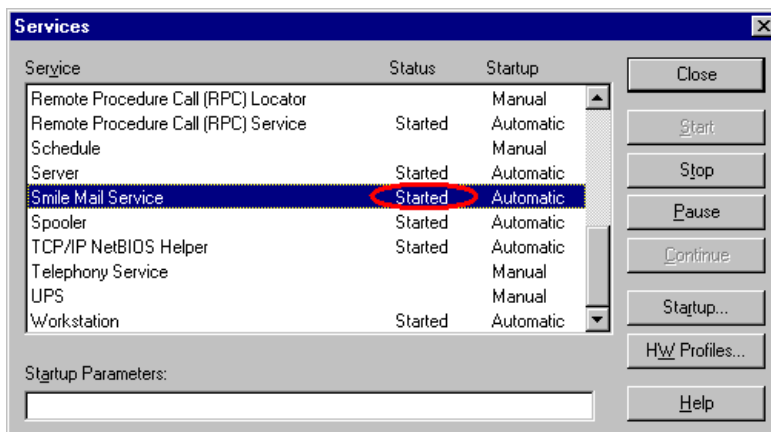
- MS Windows NT 4: 'Start\Control Panel\Services'
- MS Windows 2000 and XP Prof.: 'Start\Control Panel\Administrative Tools\Services'



To start the Smile Mail Service you can either click on the <Start> button or double click on the batch file called 'SmService Start' located in the Smile application directory



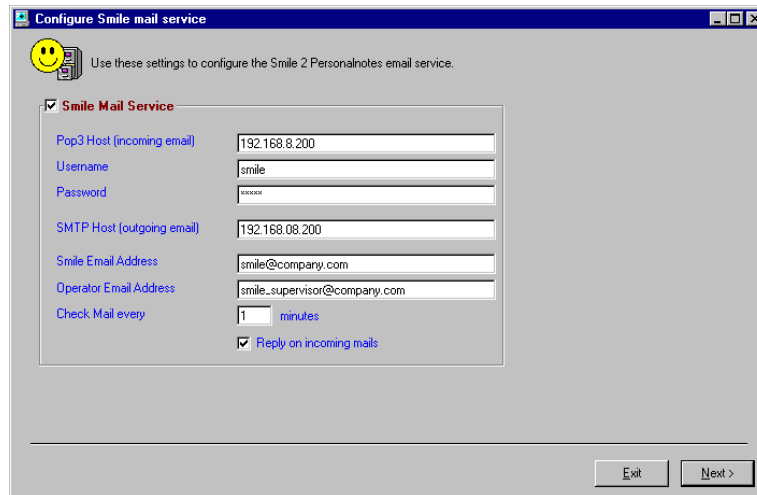
The Smile Mail Service should be started. You can check it with the Services List window.



Smile Mail Service Configuration:

Now we have to configure the Smile Mail Service with the Smile configuration utility (Config.exe).

Start the Config.exe and click <Next> until the 'Configure Smile Mail Service' window appears. If it does not appear, it means that the Smile configuration utility does not detect a Premium Dongle.



The parameters are:

- Smile Mail Service check box: To activate/Deactivate the Smile Mail Service
- POP3 Host: Name or IP address of the POP3 server (incoming e-mail server)
- Username: Username of the Smile mailbox
- Password: Password to open the Smile mailbox
- SMTP Host: IP address of your SMTP server used for the automatic reply (outgoing e-mail server)
- Smile Email address: address to use in the FROM: of the automatic mail reply
- Operator Email address: address to use in case of problem
- Check Mail every: delay for the periodic check of the Smile mailbox for new incoming e-mail.
- Reply on incoming mails: specify if an automatic mail reply must be sent for each incoming mail

The SMTP protocol is used by the reply on incoming mail option. It means that you must allow the SMTP protocol on you mail server. For MS Exchange you will need the 'Internet Mail Protocol' and the 'SMTP service'. The SMTP service is a part of the 'Internet Information Service' components.

## 6.2.9 UnInstall summary

In order to uninstall the SmService you have to:

- Stop the SmService by starting the 'SmService Stop.bat' file located in the Smile application directory
- Deactivate the SmService by starting the 'SmService Uninstall.bat'
- Uninstall the SmService with the Add/Remove Programs of the Control Panel

## 6.3 THE OPEN CALENDAR FACILITY


### 6.3.1 Description of the functionality

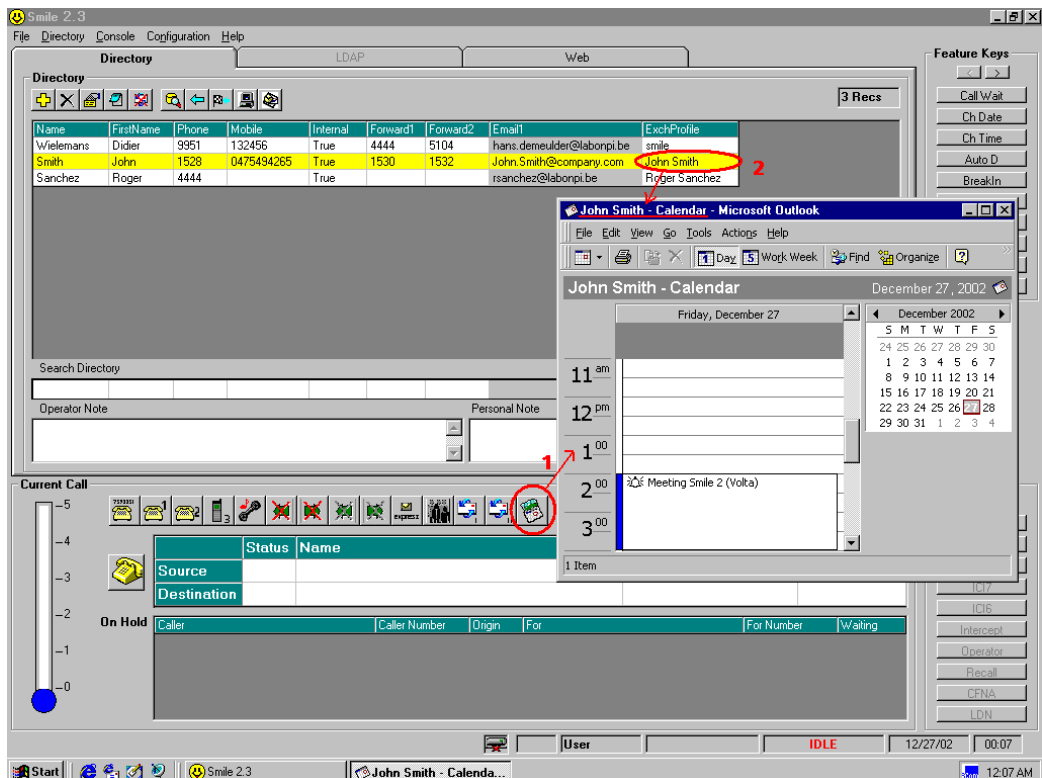
The operator can open the agenda of a looked-up person in the local repository, when clicking the <Calendar> button. This way the operator can verify the person's agenda as it opens on the current day.

Smile uses the personal account information of the operator to address the Outlook Object Model, passing the person's e-mail address as a parameter to open his/her MS Outlook Calendar on the present day.

The format of the Outlook Calendar is displayed as defined in MS Outlook.

### 6.3.2 Display

A <Calendar> button  is added to the Current Call Zone toolbar, enabling the operator to open the agenda of the person in focus (2). If the agenda is opened, the MS Outlook application appears in its proper window (1). The operator is responsible to close all windows and MS Outlook.





### 6.3.3 Errorhandling

If access to a person's calendar is denied, then this is the result of improper configuration of MS Outlook and/or the operator's account.

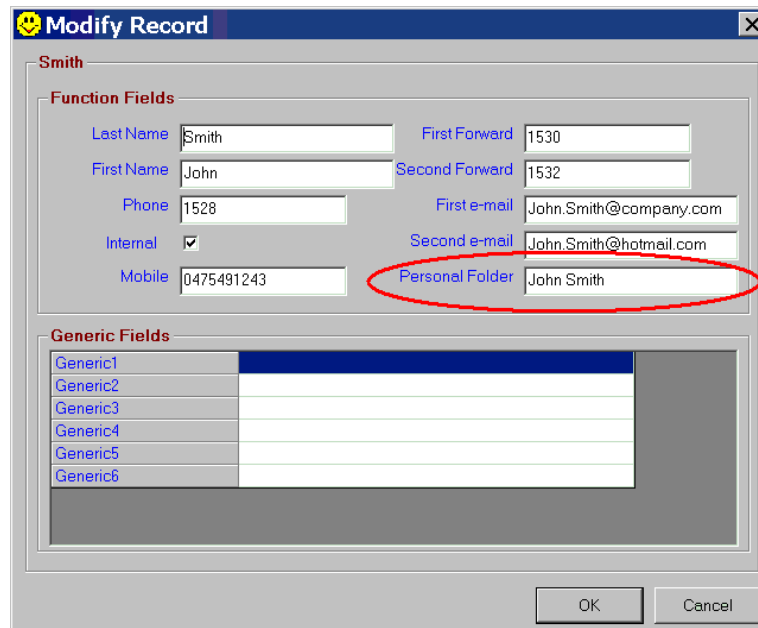
The Smile application cannot account for errors generated by MS Outlook.

### 6.3.4 Installation and configuration

This feature uses the MS Outlook 97/2000 resources. Refer to your MS Outlook documentation to install it.

Each operator needs an account that is able to send/receive mail and that has the privileges to access the agenda's of the employees of the company.

The Personal Folder also called Display Name in MS Exchange will be used to open the calendar of the looked-up person.



The screenshot shows a 'Modify Record' dialog box for a contact named 'Smith'. The dialog is divided into two sections: 'Function Fields' and 'Generic Fields'. The 'Function Fields' section contains several input fields: Last Name (Smith), First Name (John), Phone (1528), Internal (checked), Mobile (0475491243), First Forward (1530), Second Forward (1532), First e-mail (John.Smith@company.com), Second e-mail (John.Smith@hotmail.com), and Personal Folder (John Smith). The 'Personal Folder' field is circled in red. The 'Generic Fields' section contains a table with six rows labeled Generic1 through Generic6. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Function Fields	
Last Name	Smith
First Name	John
Phone	1528
Internal	<input checked="" type="checkbox"/>
Mobile	0475491243
First Forward	1530
Second Forward	1532
First e-mail	John.Smith@company.com
Second e-mail	John.Smith@hotmail.com
Personal Folder	John Smith

Generic Fields	
Generic1	
Generic2	
Generic3	
Generic4	
Generic5	
Generic6	


## 6.4 THE SEND MAIL FACILITY

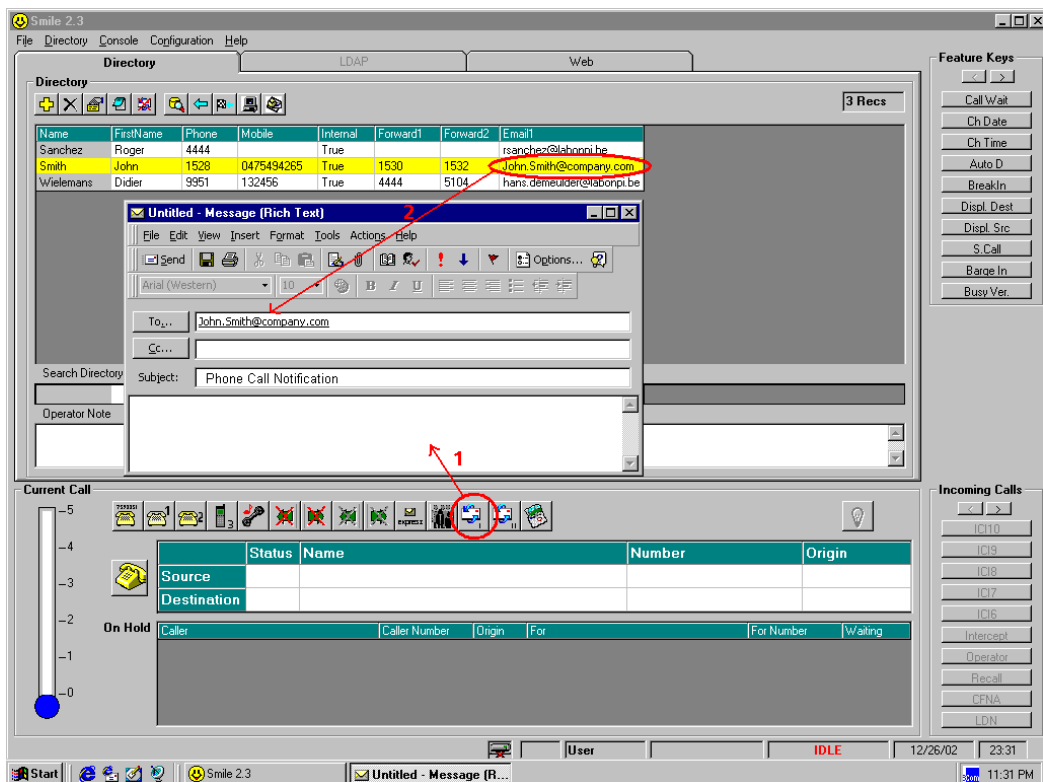
### 6.4.1 Description of the functionality

The operator can send an e-mail to the person in focus (provided a valid e-mail address is filled in), via his/her e-mail interface that opens when clicking the appropriate button.

### 6.4.2 Display



A new <send mail> button  is added to the toolbar. When the button is clicked (1), your e-mail interface (e.g.: MS Outlook, Lotus Notes, etc...) opens via the personal account information of the operator, with a 'new message' window. The To-field is filled in with the e-mail address of the person in focus (2) and the Subject-field with the predefined text 'Phone Call Notification'.



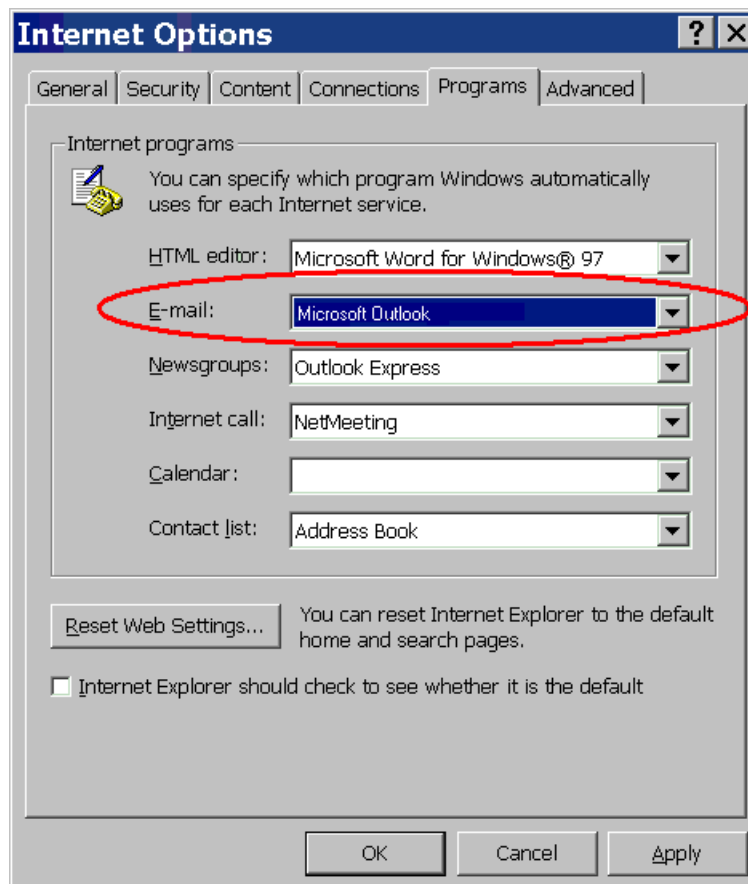
### 6.4.3 Errorhandling

The operator is responsible to actually send the message and close the e-mail client. Smile will not account for invalid e-mail addresses that are filled in incorrectly in the local repository.

Any errors that may occur during this operation will be generated by the e-mail client. The operator has to refer to e-mail client documentation to resolve any errors.

#### 6.4.4 Installation and configuration

The Smile uses the MS Windows command 'MailTo' to send e-mail. It means that the Smile will use your e-mail client interface installed on the smile workstation to send e-mail. Before using this Smile feature verify that you are able to send e-mail with your e-mail client. You have also to verify your Internet Explorer configuration to know which application will be used by default to send an e-mail. To do it, start your Internet Explorer, go to the tools menu item and select the Internet Options:



## 6.5 DATABASE AND INI FILE ADJUSTMENTS

The structure of all repositories (console 0 and others) have been updated with the introduction of new fields in the PhoneList table:

- email1 (the first e-mail address) : the internal or company e-mail address of the person, of type 'text'
- email2 (the second e-mail address) : the external or private e-mail address of the person, of type 'text'
- personalnote (the personal note) : the body of the mail message sent by the person, containing his personal note, of type 'text' (length : 255 char)
- rcvdatenote (the receive date of the note) : the date and time a personal nota was received from the person, of type 'date/time'
- expdatenote (the expiration date of the note) : the date and time of expiration of the personal note, of type 'date/time'
- exchprofile : Display Name of the user. It is used to open the user's calendar

A new section called [SMSERVICE] is used to store the Smile Mail Service configuration in the config.ini file:

[SMSERVICE]

Prompt	Value	Description
ScheduleIncrement	60	delay for the periodic check of the Smile mailbox content
OperatorEmail	smile_supervisor@company.com	address to use in case of problem
SMTPHost	192.168.08.200	IP address of your SMTP server used for the automatic reply
UserName	Smile	Username of the Smile mailbox
Password	μIzty	Password to open the Smile mailbox
SmileEmail	smile@company.com	address to use in the FROM: of the automatic mail reply (SMTP)
POP3Host	192.168.8.200	Name or IP address of the POP3 server
UseSMservice	1	To enable/disable the Smile Mail Service (0/1)
ReplyOn	1	Specify if an automatic mail reply must be sent for each incoming mail
ScheduleDateTime	2002/12/19 01:50:00	Date and Time of the next Smile mailboxperiodic check
ScheduleDeleteDateTime	2002/12/20 00:00:00	Date and Time of the next SmService Midnight routine

## 7 Maintenance

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Administrator intervention:

- Pack of the DB:  
This operation is one of the last step of the Smile MidNight routine. In case of the MidNight routine is not active we recommend you to do it manually  
If the MidNight routine is not active, Pack the DB with the menu item Directory\Pack (Need administrator Right). It can be done on all the Smile workstation. The pack of the network DB will be performed by the Master Smile Console.
  
- Back Up the database, the configurations and log files  
Smile: config.ini, Smile.mdb, LoadMaster.bat, logfile.txt  
SmUpdate: SmUpdate.ini, SmUpdate.log  
Email: SmService.log  
LDAPUpdate: LDAPUpdate.log
  
- Check the log files :
  - SmUpdate.log : Are there problem with the import
  - SmService, LDAPUpdate
  
- Delete the old LDAP record. Thanks to the field LDAPStamp in the PhoneList table of the Smile DB you will determine the last LDAP Update. Remember that the LDAP Update never delete a record. So you have to delete manually with MS Access the record with a LDAPUpdateStamp older that a certain limit.

How to open a Customer Support Request.

Do not hesitate to consult our FAQ available on our Web Site : [www.ascom.be](http://www.ascom.be)

## 8 Appendix

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### Appendix C

#### SMILE AND FIFO ALGORITHM

Smile can be configured to use the Smile algorithm or the FIFO algorithm. One of these two algorithms can be used when the user presses the ENTER key.

##### Smile Algorithm

When pressing the "ENTER" key, Smile will answer incoming calls in the following order:

- LDN: If a Listed Directory Number (LDN) is active then Smile will answer a LDN0 call.
- VIP: If no LDN is active then Smile will answer a Very Important Person (VIP) call.
- CFNA: If no VIP call is active then Smile will answer a Call Forward No Answer (CFNA) call.
- RECALL: If no CFNA call is active then Smile will answer a RECALL call.
- INTERCEPT: If no RECALL call is active then Smile will answer an INTERCEPT call.
- ONHOLD: If no INTERCEPT call is waiting then Smile will re-enter a call held on the first loop key.

If no call is waiting then Smile will take line to place a call.

##### FIFO Algorithm

When pressing the "ENTER" key, Smile will answer all calls on a First In, First Out basis as they are presented to the console from the Meridian PABX.

If no call is waiting then Smile will take a line to place a call.

#### SEEKMODE

Previously, the incoming call search mechanism was based on the CLID (caller number). Now since the Smile 2.2.2, the new search mechanism is controlled by the SeekMode.

Three modes are available :

SeekMode=0 : no seek is performed.

SeekMode=1 : a seek on the CLID is performed before the telephonist takes the call.

SeekMode=2 : a seek on the DNIS (called number) is performed before the telephonist takes the call.

During the installation, the technician will configure the SeekMode with the config.exe

Appendix D

DSClient Installation

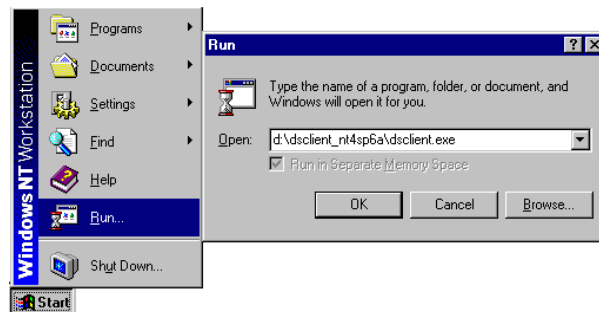
If you are using Windows 98 SE or Windows NT4 SP6a you will need the DSClient components. It is used by the LDAP lookup and LDAP Update functions.

- Step 1: Starting the DSClient Installation

It is recommended to exit all the other Windows programs before starting the installation.

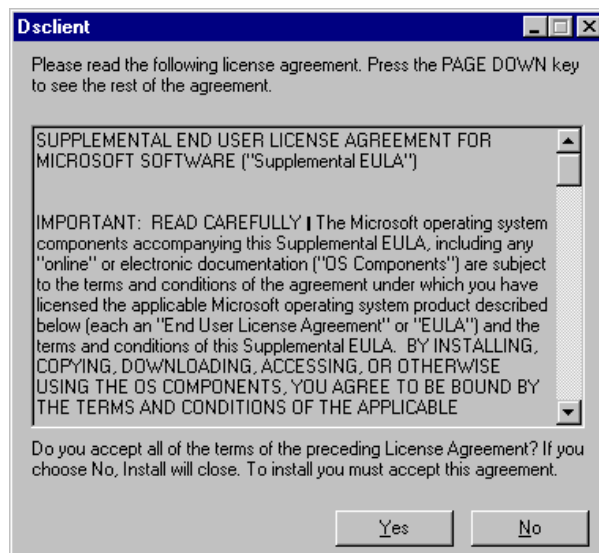
Launch the DSClient.exe available on the Smile CD-ROM, two versions are available:

CDRom:\Dsclient\_98se\dsclient.exe (for Windows 98 SE)  
CDRom:\Dsclient\_NT4SP6a\dsclient.exe (for Windows NT4 SP6a)



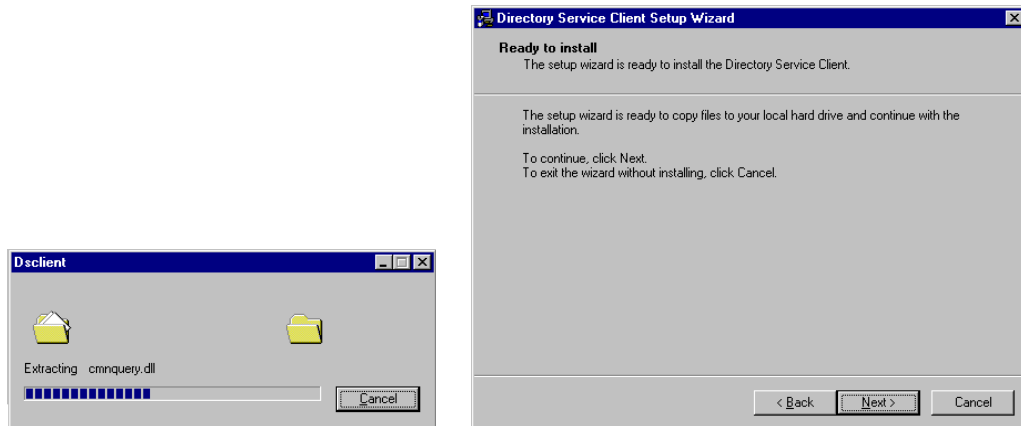
If needed, adapt the CD-ROM drive letter d: to match to your PC configuration.

- Step 2: License agreement



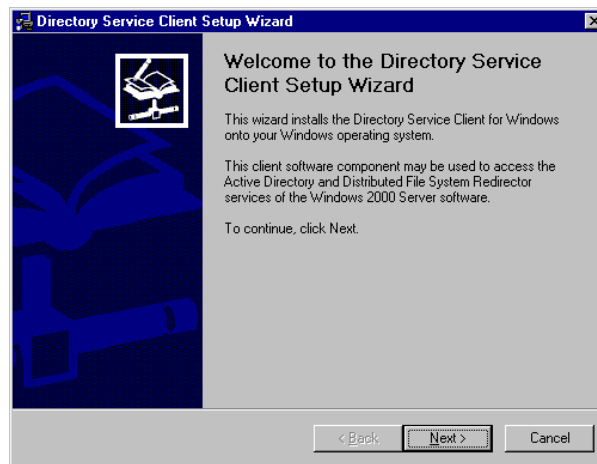
Click <Yes> to accept the license agreement.

- Step 3: File extraction and start of the setup wizard :



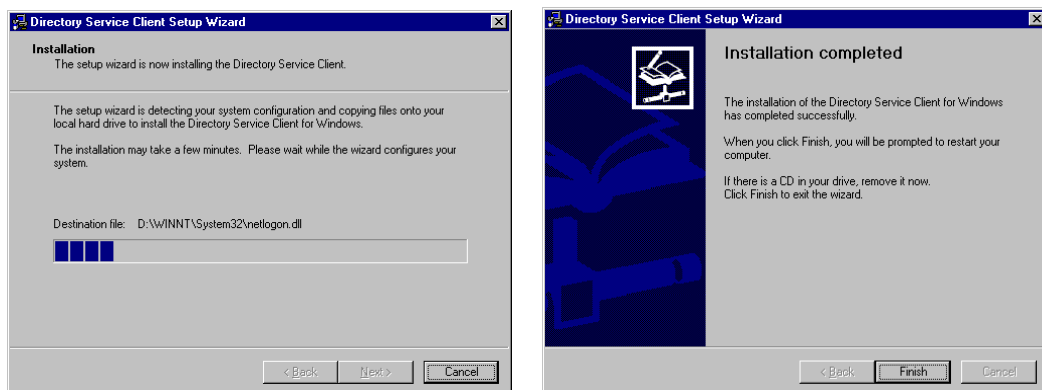
Click <Next> to continue.

- Step 4: Welcome



Click <Next> to continue.

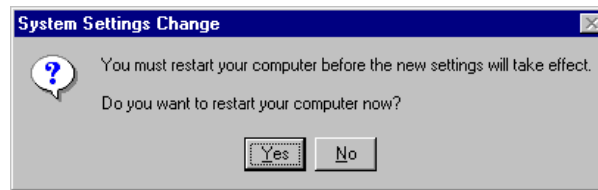
- Step 5: Installation – Installation completed



Click <Finish> to continue.

- Step 6: Reboot





Click <Yes> to restart your computer.

## **Index**

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Did you know that Smile software for Meridian 1 and Succession CSE 1000 attendant console solutions has been a bestseller in the market for several years?

More than 3.000 systems are already installed across Europe, Middle East and Africa.

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For more informations about Smile and services contact

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