InTouch Administration Guide

BCM
Business Communications Manager

NORTEL

Contents

Chapter 1
Getting started

This section contains information on the following topics:

About InTouch

InTouch is an Outlook Add-In user application that runs on a Windows based PC and integrates Outlook, MSN, and Skype with BCM Call Management and Control. InTouch optimizes communications by providing consolidated presence information and by presenting a variety of communication options such as voice, email, and/or Instant Messaging (IM).

InTouch brings together the most popular forms of communications by providing direct one-touch interaction between telephony, email, calendar and IM.

Minimum requirements

Operating system:

- Windows XP Professional SP3
- Windows Vista SP2 Business, Ultimate or Enterprise (32 OR 64 bit)

.Net framework:

- Framework 3.5 Service Pack 1 – available from Microsoft's web site

Microsoft Outlook:

- 2002 (XP)
- 2003
- 2007

Microsoft Exchange:

- 2000
- 2003

Skype (optional):

- 3.8.0.188

MSN (optional):

- 14.0

BCM:

- BCM 50 Release 5.0
- BCM 450 Release 5.0

Windows Installer:

- Windows Installer 3.1

Client PC Hardware requirements:

- 1 GHz 32-bit (x86) or 64-bit (x64) processor
- 1 GB of system memory
- At least 20 MB of available space for installation and an additional 10 MB of available space for configuration and cached contact data. The space requirement for configuration and cache will vary dependent upon the number of contacts to be displayed.
- Network Connection. 10Mb/s minimum.

First Run

When running InTouch for the first time, if you have granted a user access to more than 1 DN they are prompted to select a DN from a list of configured DNs. Two InTouch users cannot control the same DN simultaneously.

> **Note:** IP address permissions are not recommended for use with InTouch, and may result in InTouch features becoming unavailable.

If only 1 DN is available for the user InTouch will use that DN automatically.

If no DNs have been provisioned InTouch features are unavailable.

> **Note:** If you add a DN to the BCM system while InTouch is running on a user PC, the DN will not become available until the client is restarted.

The InTouch panel will initially be devoid of contacts, Users must add their own contacts to the InTouch contact list. For more information about adding contacts to InTouch, refer to Nortel Business Communications Manager InTouch User Guide (NN40170-102).

You can configure permissions on the BCM based on Domain/User Account, machine name and IP Address of the user's PC. The permissions include configuring zero, one, or more DNs that the user is allowed to use in InTouch.

When InTouch is started for the first time, the list of permitted DNs for the user is downloaded from the BCM. If no DN permissions are configured for the user, an error message is displayed. If the user is permitted to use a single DN, InTouch uses it automatically. If more than one DN is available, the user is prompted to select which DN to use. Figure 1"DN selection window" (page 7) shows the DN selection window.

Figure 1   DN selection window

You can change the list of permissions on the BCM while InTouch is running, as InTouch refreshes the list of permitted DNs from the BCM every 150 seconds. As such, users will not have to restart InTouch or Outlook if administrator changes are made. If a change in the list is detected by InTouch, the DN selection window message will change to: "Permission for your DN has changed, please choose another telephone number". The user can then select another DN.

Once the LAN CTE connection is established and if the user is running Skype, the user will be prompted to allow Outlook.exe to access Skype.

InTouch Service Reliability

Outlook, BCM, Skype, and MSN features are started by InTouch on startup. If a particular service fails to start, InTouch will attempt to restart it after approximately one minute.

If a service fails to start, the functions provided by the service will be unavailable to the user. Contacts used by the service will either be unavailable, or the contact details will be maintained but the presence will be unavailable.

Note: If the BCM service fails and the BCM License becomes unavailable the InTouch internal Outlook, Skype & MSN services are stopped and their functions are unavailable until the BCM Service is restarted and licensing restored.

In the event of BCM service failure Outlook, Skype. and MSN (if installed) will continue to function normally on the user's PC. Only InTouch functionality is affected.

Diagnostics and Troubleshooting

Table 1"Common LAN CTE failures" (page 8) shows common LAN CTE failures handled by InTouch. For additional troubleshooting information, see "Troubleshooting" (page 15).

Table 1 Common LAN CTE failures

Scenario	Error Message	Resolution
LAN CTE Client libraries are not installed or cannot be loaded.	"Unable to initialize a required BCM library. Please check your LAN CTE Client installation or contact your administrator"	Uninstall any old LAN CTE clients and reboot machine. Install the correct LAN CTE Client from the BCM and reboot the PC again.
Unable to Contact the BCM at the given address OR The BCM becomes unavailable while InTouch is running (LAN CTE issues a CTE_SHUTDOWN event – including when the network connection to the BCM is lost).	"Unable to contact the BCM at address <BCM address>, please contact your administrator"	Confirm that the IP address is correct. Confirm that the BCM at the IP address is reachable and working correctly.
No InTouch licenses are available (either there are no licenses or they are all in use).	"No InTouch Licenses are available, please contact your administrator"	Install additional InTouch license keys.
No LAN CTE lines are available for the current user/computer/IP address (including if no provisioning has been performed for any user/computer/IP address).	"No Lines are configured for your use, please contact your administrator"	Configure lines for the current user/computer/IP Address using BCM Element Manager.

Chapter 2
Installing InTouch

InTouch is installed on individual client PCs and requires one InTouch seat license per concurrent user to be available on the BCM. The installation of an InTouch license includes a LAN CTE License, which InTouch uses for its operations.

If there are no InTouch licenses available, all features will be available for that user, however, the application will still install and attempt to run when Outlook is started.

InTouch installation is a two part process. The first part is performed by an administrator or system installer. The second part can be performed by the end user leveraging the information provided by the administrator or system installer to simplify the installation process.

For information about the minimum system requirements for InTouch, see "Minimum requirements" (page 5).

This section contains the following topics:

Pre-installation

Pre-installation is performed by an administrator or system installer once per site or BCM. The pre-installation can be performed on any PC with access to the BCM's web interface (for access to the InTouch installer & LAN CTE Client installer) and Microsoft's web site (for access to the .Net 3.5 SP1 redistributable).

Pre-installation also requires access to a shared network folder or drive for publishing the pre-configured InTouch files for end users to access.

LAN CTE access must be configured on the BCM for each user, PC or IP address that you want to be able to use InTouch. You can configure LAN CTE permissions the BCM Element Manager. For more information about configuring LAN CTE permissions, refer to Nortel Business Communications Manager 5.0 Administration and Security (NN40170-603) and Nortel Business Communications Manager LAN CTE Configuration Guide (NN40010-601).

The following pre-installation tasks are optional but will simplify the installation process

Pre-installation tasks (optional)

1   Ensure that all exchange users have their DN (business number), mobile/cell number (optional), and email address entered correctly by the exchange administrator.
    External telephone numbers should be entered in national format, using the international notation (for example, a user in North America would use +1 XXX XXX XXXX format).

2   Download InTouch setup (InTouch_setup.exe) from www.nortel.com.

3 Download InTouch Configuration Manager (InTouchConfigurationManager.exe) from the www.nortel.com.

4 Download the LAN CTE client installer from the BCM.

5 Download the .Net Framework 3.5 Service Pack 1 (SP1) redistributable package from the Microsoft web site.

6 To launch the InTouch pre-configuration wizard and generate the "SettingsMain.xml" file, run the InTouch pre configuration, downloaded from the BCM (InTouchConfigurationManager.exe).

OR

Run the InTouch setup with the command line argument **InTouch_setup.exe/ CustomConfig**.

7 Provide the pre-installer with the required information for the location

- Voicemail DN
- Digit for the external line
- International Dialing Prefix
- BCM IP address. InTouch supports a single BCM so only one IP address is required.

8 Place the following four items in the shared network folder for users to access:

- InTouch_setup.exe
- LAN CTE client installer
- .NET 3.5 SP1 standalone installer (dotnetfx35.exe)
- SettingsMain.xml

9 Notify users of the published location of the files.

shows an example of a pre-configuration, to be exported as the SettingsMain.xml file.

Figure 2 Pre-configuration Wizard

### To obtain the Voicemail DN from the handset

1 On the handset press **Feature 985**. The handset displays the DN for voicemail on the screen.

To obtain the Voicemail DN from Callpilot Manager

1 Using Internet Explorer, access the BCM web page.

2 Log onto Application Launcher using your username and password.

3 Select **Administrator Applications**.

4 Select **Call Pilot Manager**.

5 Click **Launch**.

6 Log onto Callpilot Manager.

7 Go to **Configuration > Switch Properties**. The Voicemail DN is displayed in the appropriate field.

To obtain the direct dial digit

1 Log onto Business Element Manager

2 Go to Telephony > Dialing Plan > General. The Direct Dial digit is shown in the **Direct Dial digit** field.

Figure 3 Direct Dial digit
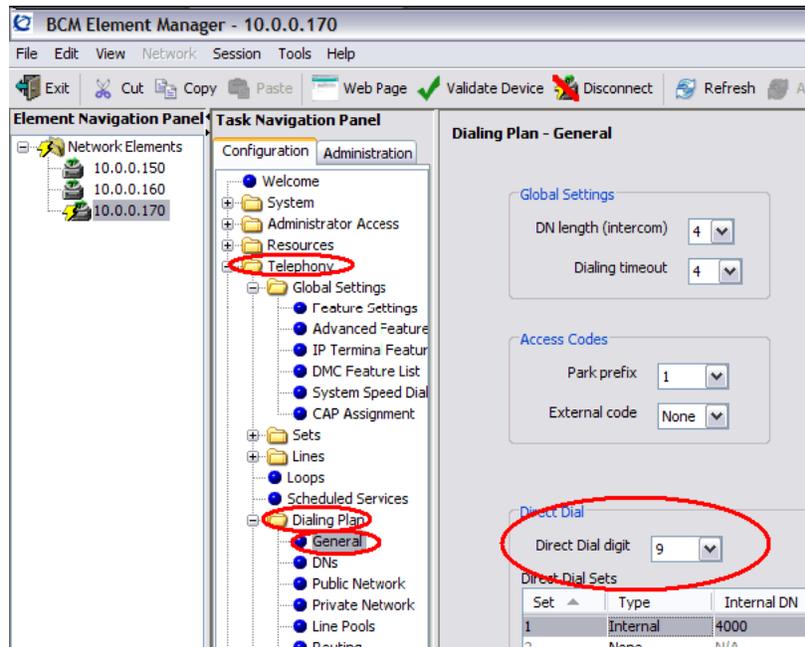
Installation

Installation is performed at the end user's PC. Before beginning the installation, ensure that the InTouch_setup.exe, LAN CTE Client Installer, .NET 3.5 SP1 standalone installer (dotnetfx35.exe), and SettingsMain.xml are available at the published location.

InTouch attempts to detect if the LAN CTE client installed (the version number is not detected). If no LAN CTE client installation is found the user will be notified that InTouch will still install but will not be functional until a LAN CTE Client is installed and InTouch license is able to be acquired.

If available, InTouch uses SettingsMail.xml (default settings file) as the starting point for the InTouch settings file.

If there is no SettingsMain.XML file, or the file is incomplete, the user will be notified of this as part of the installation process and the user will need to configure all settings within the InTouch settings manually.

Upon Installation adxloader.log is created in the folder My Documents > Add-In Express (Windows XP) or Documents > Add-in Express (Windows Vista). This log file contains information regarding the success or failure of the InTouch Plug-in to be registered with Outlook and can be used in troubleshooting in the case of a failed installation.

InTouch requires Microsoft .Net Framework version 3.5 with service pack1 to operate correctly.

> **Note:** While it is not required that all active DNs of a BCM are pre-populated in an active directory and accessible from the Global address Book it will make for a better user experience. Nortel recommends that the installation not be while connect to the published location through VPN.

To install InTouch on a user PC

1   Install the latest LAN CTE Client and .Net 3.5 SP1 before installing InTouch.

2   Run InTouch_setup.exe from the published location.

3   On the Welcome Screen, click **Next.** The End User License Agreement screen appears.

4   Review the license agreement and click **Next.** The Select Destination Location screen appears.

5   Click **Next** on the Select Destination Location screen if you want to use the default installation location. Otherwise, browse to the location where you want to install InTouch and click **Next**. The Select Start Menu Folder screen appears.

6   Click **Next**.

7   Click **Install** to begin the installation. During the installation process the Nortel InTouch components, dependencies, and Microsoft Shared Add-in extensibility update are installed and the final registration of components are completed.

8   Click **Finish** when the installation process ends to complete the installation.

Uninstalling InTouch

1   From the Windows Control Panel, select **Add or Remove Programs**. The Add or Remove Programs screen appears.

2   From the list of currently installed programs, select **InTouch**.

3   Click **Change/Remove**. The unistall wizard appears.

4   Follow the on-screen instructions to uninstall the InTouch application. Uninstalling InTouch does not remove user configuration, the Nortel LAN CTE client, or the .NET Framework.

Chapter 3
Troubleshooting

The following chapter provides some basic troubleshooting instructions for InTouch.

This chapter contains the following sections:

Network and system problems

The following tasks can be performed to troubleshoot issues involving the client's PC configuration, and network connectivity.

To check network connectivity to the BCM

1   Attempt to ping the BCM's LAN CTE interface IP address via the command prompt of the user PC using the command **ping <BCM LAN CTE IP address>**. If no reply is received, there may be a problem with the network connection.

> **Note:** You can check the current LAN CTE interface IP address using the **ctebcmid** command from the command prompt. To change the LAN CTE interface IP address, enter **ctebcmid <new IP address>** from the command prompt.

To check system compatiblity

1   Ensure the installed version of Exchange, Outlook, Skype, and MSN are all supported by InTouch. Compatible versions are listed at "Minimum requirements" on page 5.

2   Ensure you system meets the minimum system requirements listed at "Minimum requirements" on page 5.

3   Ensure you have the .NET Framework properly installed, and running the correct version.

Accessing the Adxloader log file

The Adxloader.log file contains information about the InTouch installation. In particular it records that InTouch successfully registered with Outlook at the time of the install.

To check the Adxloader log file

1   Navigate to C:\Documents and Settings\<user>\My Documents\Add-in Express and locate the adxloader.log file.

2   Open the file in Notepad or Wordpad. The adxloader.log file will list the startup directory of InTouch, and the location of the configuration file.

3   Ensure that there are no errors in the adxloader.log file.

Using InTouch Diagnostics

InTouch Diagnostics provides information about the status of LAN CTE, Outlook, Skype, and Windows Live Messenger. From the Diagnostics screen you can also create a text file that contains the current diagnostic information.

To access InTouch Diagnostics

1   With InTouch running, click the **About InTouch** icon, located at the bottom right corner of the main InTouch panel.

2   From the About InTouch screen, select **Diagnostics**. The Diagnostics screen appears and displays InTouch status information.

3   Click **Export** to create a text file containing the current diagnostic information.

InTouch Logs

InTouch has three logging modes: None, Basic, and Extended. InTouch is set to Basic logging by default.

- None - No information is logged.
- Basic - Only errors are logged
- Extended - all errors, warnings, and informational messages are logged. Nortel recommends using this option for short intervals only during troubleshooting. Basic logging should be used in most instances.

Logs are written to the Nortel InTouch event log found at **Control Panel > Administrator Applications > Event Viewer**. The Log by default is limited to 1 MB maximum and will overwrite older messages as needed. These properties can be changed if needed using the Event Viewer application.

If Skype is closed, InTouch continues to display the last observed contact details but will no longer show a presence indicator for each Skype contact as appropriate. When Skype comes back on line, InTouch will up-date the relevant presence.

To adjust the logging mode

1   From the InTouch options screen, select **Extended Logging**. If the Extended Logging field is cleared, InTouch uses Basic logging mode.

Checking COM Add-ins

The COM Add-ins screen in Outlook displays information about Outlook add-ins, including InTouch.

To check that InTouch is listed under COM Add-ins

If Windows Live Messenger is closed, InTouch continues to display the last observed contact details but will no longer show a presence indicator for each MSN contact as appropriate. When MSN comes back on line, InTouch will up-date the relevant presence.

1 In Outlook 2002 or 2003 go to **Tools > Options > Other > Advanced Options > COM Add-Ins.**

OR

If using Outlook 2007 go to **Tools>Trust Centre>Add-ins>Manage "COM Add-ins"** and click **Go**.

2 Ensure that InTouch appears in the list, is enabled, and that the load behavior reads **Loaded at startup**. If InTouch did not successfully load, the check box will be cleared and an error message will apear under the load behavior.