USER GUIDE

Enterprise IP Solutions

OfficeServ Link V3

SAMSUNG

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INTRODUCTION CHAPTER 1

What is OfficeServ Link?

OfficeServ Link is an application gateway providing Computer Telephony Integration (CTI) access to the OfficeServ 7000 Series of keyphone systems. It can connect to up to eight systems simultaneously, allowing more centralized management of CTI in multi-system installations. OfficeServ Link connects to the OfficeServ 7000 Series systems over the LAN via TCP/IP communications. This means that the PC OfficeServ Link runs on and the OfficeServ 7000 Series systems must be connected to the same LAN.

OfficeServ Link regulates traffic between CTI applications and the OfficeServ 7000 systems, providing a centralized connection point and eliminating the need for complicated hardware modules or custom middleware development.

Connections to OfficeServ Link are controlled through the use of a software license key that is purchased from Samsung. The license key is similar to product keys commonly used in other software products. This licensing method eliminates the need for dongles or other hardware based solutions that are difficult to manage and can easily become damaged or lost.

The OfficeServ Link application gateway is required for the following products:

- OfficeServ Communicator's DeskPhone Mode
- OfficeServ Call
- OfficeServ Operator
- OfficeServ Messenger
- OfficeServ EasySet
- OfficeServ DataView
- OfficeServ OpenTSP

Be careful when installing OfficeServ Link in multi-site locations; data routing issues and/or data latency may hinder performance and cause unintended errors in CTI applications. Multi-system connections are intended primarily for single-site multi-system locations, such as a corporate headquarters.

Things to Know Before Installation

Keyphone Requirements

OfficeServ Link is compatible with any of the OfficeServ 7000 Series keyphone systems, including:

- OfficeServ 7030
- OfficeServ 7100
- OfficeServ 7200-S
- OfficeServ 7200
- OfficeServ 7400

PC Requirements

The OfficeServ Link application is a critical point for OfficeServ CTI applications, and as such it must be loaded on to a PC dedicated for Samsung OfficeServ CTI applications. This PC must meet the following **minimum** requirements, and may require higher specifications for multi-system installs:

Operating System	Microsoft® Windows XP or higher *including but not limited to:* *Windows 7, XP Professional, Vista, 2003, and 2008*
CPU	Pentium 4 - 1.6 GHz
RAM	1 GB
Hard Disk Space	20 GB

OfficeServ Link is only supported on Microsoft® Windows operating systems. Samsung will not support OfficeServ Link on Mac OS® or Linux systems.

If you intend to have more than 10 users connecting to OfficeServ Link it is strongly recommended that you install it on a server version of Windows (2003 or 2008) where unlimited connections are allowed as Windows 7, Vista, and XP cap the number of TCP/IP connections at 10.

Local Administrator rights are **required** in order to install **and** operate OfficeServ Link.

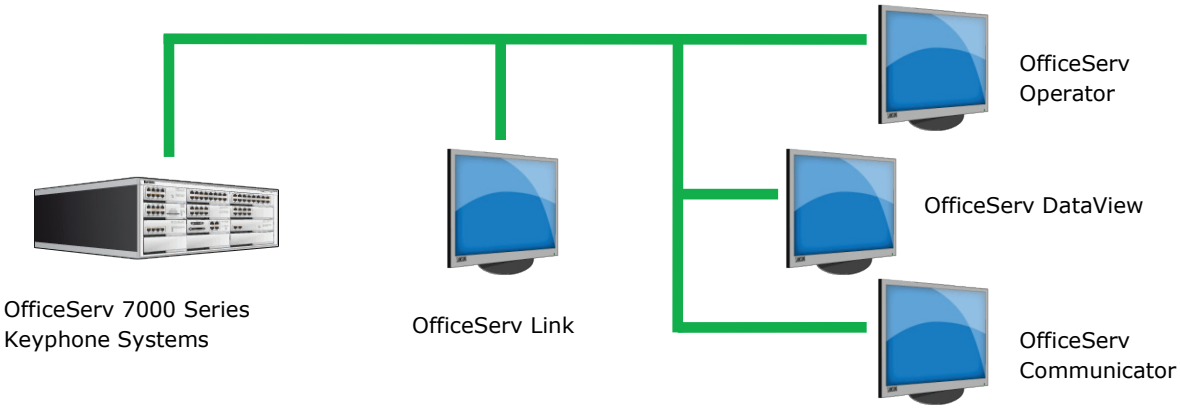
30 Day Free Trial Period

Samsung provides a 30 day free trial period for OfficeServ Link to allow users to experience and evaluate the Samsung CTI applications risk-free. This free trial period allows CTI applications to connect to OfficeServ Link without the need for a software license key. The trial expires 30 days from the date of installation. After expiration a valid software license key must be entered in order to continue use of Samsung CTI applications. For specific details see the 30 Day Free Trial section in Chapter 3.

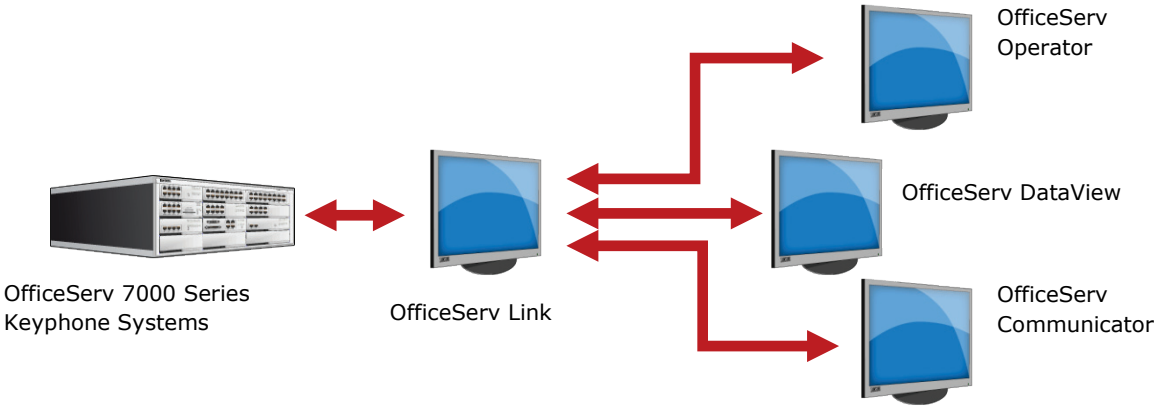
The free trial period is not dependent upon usage time. This means 30 days after installation the trial will expire even if the program has never been run.

OfficeServ Link Connection Map

OfficeServ Link connects to the OfficeServ 7000 Series systems and all client CTI applications via TCP/IP. The network diagram is shown below.



CTI applications do not communicate directly with the keyphone systems, though they reside on the same data LAN. Instead they communicate through OfficeServ Link as shown below. This configuration minimizes response times between the systems and OfficeServ Link, ensuring stable and efficient operation.



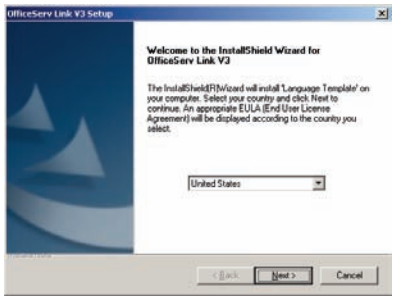
OfficeServ Link connects to the OfficeServ 7000 Series systems on TCP port 5002. CTI applications connect to OfficeServ Link on TCP port 6000. This may be useful information when installing in a complex data network.

How to Install OfficeServ Link

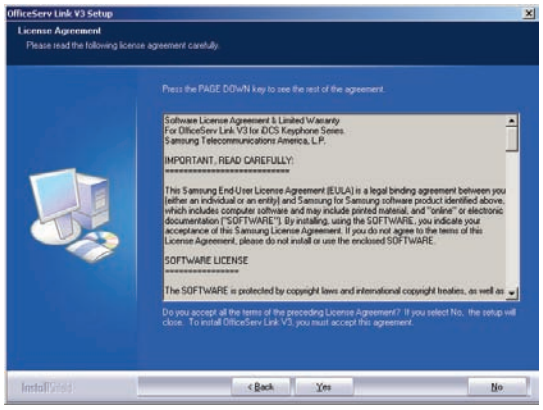
Installing OfficeServ Link is a fairly simple, straightforward process. Every effort has been made to ensure a fast and trouble-free installation. To begin, obtain the OfficeServ Link setup file from your authorized Samsung installation company.

Double-click the file to launch the setup. Initialization of the setup will begin. Proceed with installation by configuring the following settings:

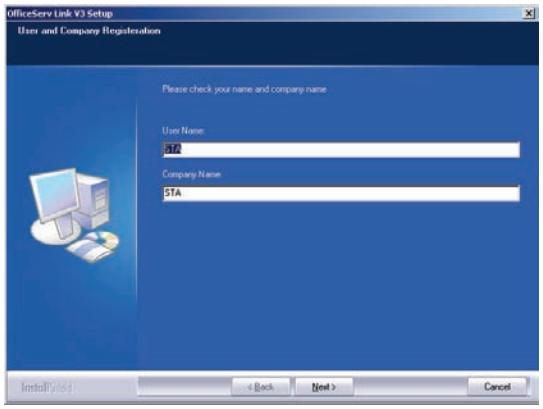
1. Choose the language you wish to read the End User License Agreement (EULA) in and then click Next. The default setting is United States (English).



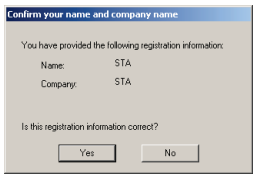
2. Carefully read the EULA and accept (Click Yes) or reject (click No) the agreement.



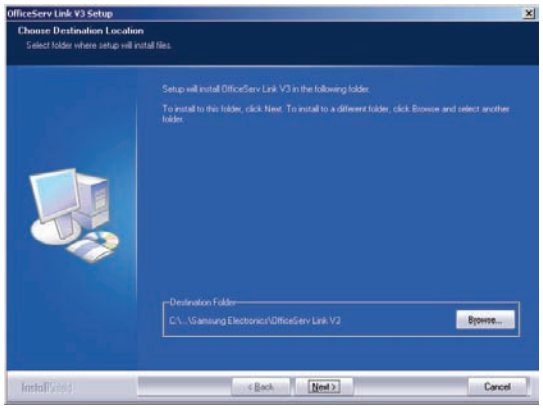
3. Enter your user and company names and then click Next. These values will default to the user name chosen when installing Windows.



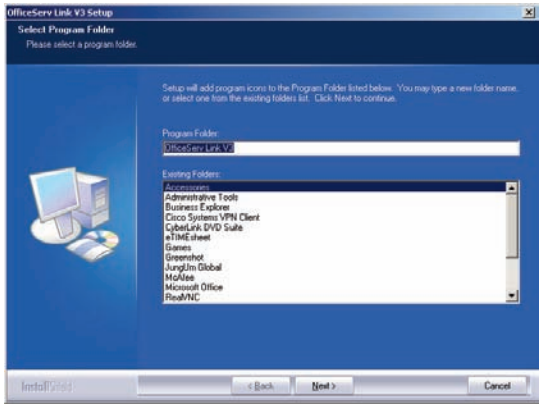
4. Confirm (click Yes) or deny (click No) that the information entered in step 3 is correct.



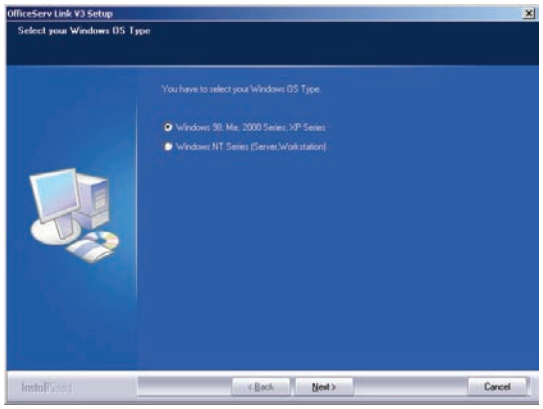
5. Select or confirm the location where OfficeServ Link will be installed and then click Next. The default location is C:\Program Files\Samsung Electronics\OfficeServ Link V3.



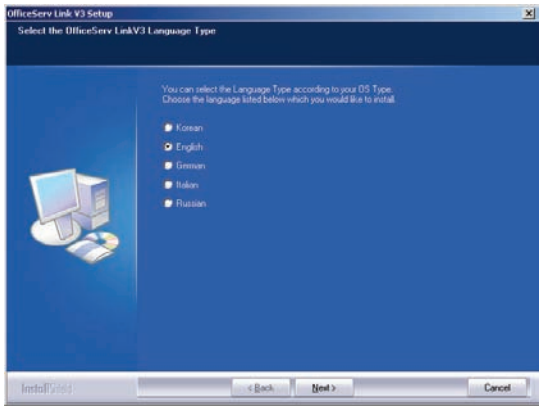
6. Select the program group on the Start menu where OfficeServ Link will be accessed and then click Next. The default setting is a new program group called OfficeServ Link V3.



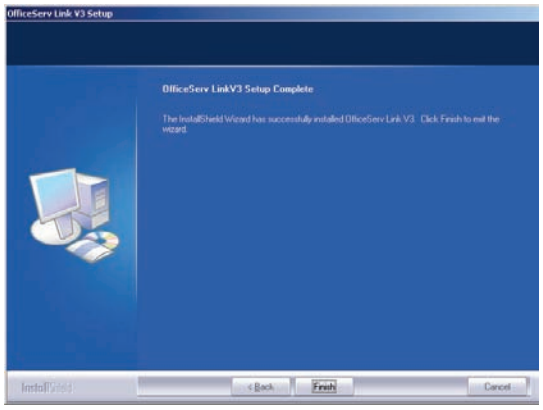
7. Choose the operating system type you are running and then click Next. This setting is important for configuring the TAPI settings for OfficeServ Link. The default setting is "Windows 98, ME, 2000 Series, XP Series" and you shouldn't change it. This is the proper setting for all operating systems Microsoft currently supports.



8. Choose the language OfficeServ Link will use and then click Next. The default setting is English.



9. Once all files have been installed and all configurations completed the setup is done. Click Finish to close the setup.



LICENSING CHAPTER 3

How Licensing Works

In order to use OfficeServ Link you will need a valid software license. Licenses are used to regulate the number of CTI users or applications that may connect to OfficeServ Link. The advantage of licensing is that you can reduce your overall costs by purchasing only the number of connections you need without having to manage a hardware dongle or a complicated middleware licensing application.

When a CTI application attempts to connect to OfficeServ Link the application type is checked against the list of licensed connections. If there are no available licenses for the connection a licensing error will be returned to the application (and the user). As an example, if an instance of OfficeServ DataView attempts to connect, but the current license allows only OfficeServ EasySet the OfficeServ DataView connection will be rejected. If there are available licenses the OfficeServ Link will return a confirmation and begin passing data to and receiving data from the application.

30 Day Free Trial License

Samsung understands that sometimes you want to test out an application to see if it works for your company before making a committed purchase. In order to fill this need the OfficeServ Link installation process creates a free 30 day trial license. This free trial license allows a fixed number of CTI applications to connect to OfficeServ Link for up to 30 days without the need to purchase a software license key.

The 30 day trial period begins the moment you install OfficeServ Link, it is not tied to the first time you launch the application. If you intend to use the trial you should install OfficeServ Link only after you are prepared to start testing applications. Once the trial expires you must purchase a license key from Samsung in order to continue using OfficeServ Link.

The trial license allows the following CTI application connections:

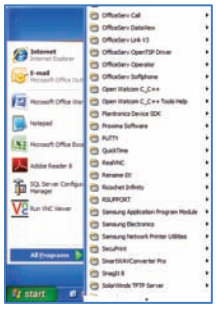
APPLICATION	NUMBER OF CONNECTIONS	DESCRIPTION
OfficeServ Communicator (DeskPhone Mode)	10	Screen pops, Outlook dialing, and other call processing
OfficeServ Call	20	Screen pops and other call processing
OfficeServ Operator	2	Fast, efficient call processing for operator/attendant stations
OfficeServ EasySet	1	Web-based keyset programming utility
OfficeServ DataView	1	Web-based system reporting package
OfficeServ OpenTSP	1	Driver for custom in-house software

How to View Your License

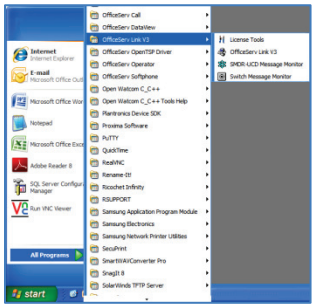
There are two methods that allow you to see your current license:

1. Run the License Tools Application.

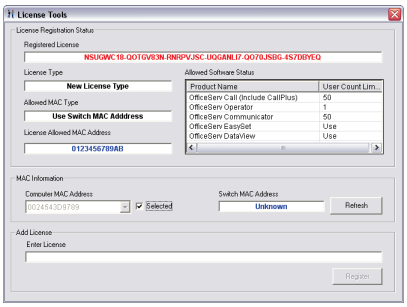
   a. Click Start, then click All Programs (or Programs if using the Classic Start Menu).



   b. Click OfficeServ Link V3 (or the group set in step 6 of the Installation process).



   c. Click the License Tools icon to launch the License Tools application.



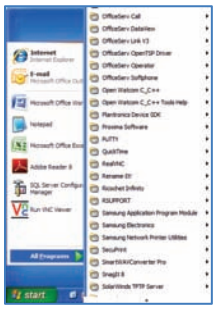
   This screen displays all available license information including the unique identifier for your specific OfficeServ 7000 Series system and the various software connections allowed by the license.

   If this is your first time running the License Tools all fields will be blank as no license key has been entered. You may either enter a valid license or close the application and continue running the 30 day trial license.

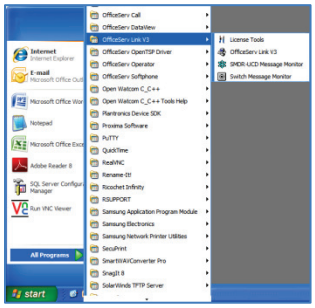
In order to close the License Tools screen when no license has been entered you must ensure that the checkbox under Computer MAC Address is checked. This checkbox is used to specify which Network Interface Card (NIC) to use for OfficeServ Link in the event there is more than 1.

2. Run OfficeServ Link.

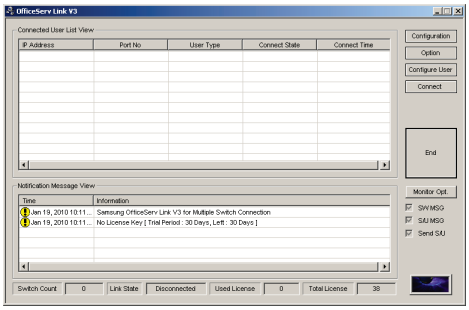
   a. Click Start, then click All Programs (or Programs if using the Classic Start Menu).



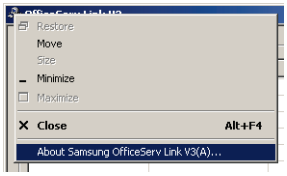
   b. Click OfficeServ Link V3 (or the group set in step 6 of the Installation process).



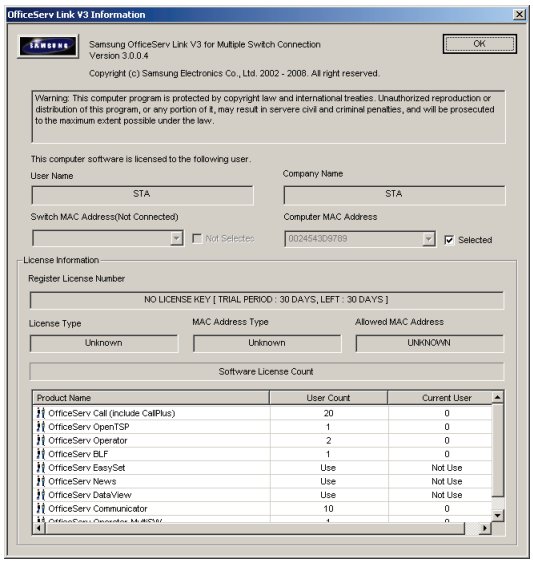
   c. Click the OfficeServ Link V3 icon to launch the OfficeServ Link.



   d. Right click the icon in the upper left hand corner of the window, then click "About Samsung OfficeServ Link V3(A)…"



e. The OfficeServ Link V3 Information window will appear.



This screen displays all available license information including the unique identifier for your specific OfficeServ 7000 Series system and the various software connections allowed by the license.

If you are running the 30 day trial license the Register License Number field will indicate that no license key has been entered and show how many days are left on the trial.

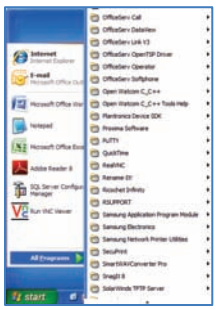
The OfficeServ Link V3 Information window is fixed at 698 pixels tall. This means that the screen resolution for your system must be at least 1024x768 to view the window without issues. Consult Windows documentation to find out how to check or change your screen resolution.

How to Enter a New License

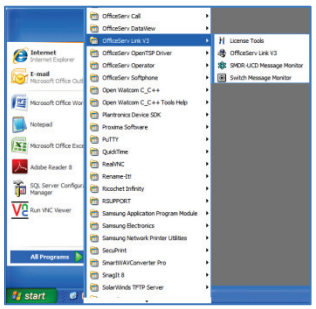
After obtaining a valid OfficeServ Link license key you must implement the key via the License Tools application. The License Tools application performs the verification of the license to ensure it is valid and authentic.

Follow these steps to run the License Tools application:

a. Click Start, then click All Programs (or Programs if using the Classic Start Menu).

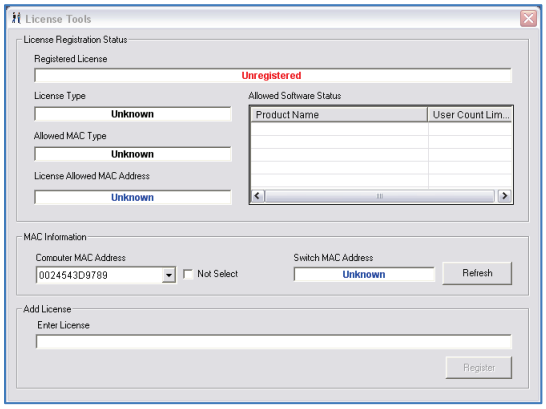


b. Click OfficeServ Link V3 (or the group set in step 6 of the Installation process).

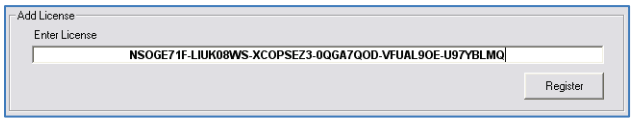


c. Click the License Tools icon.

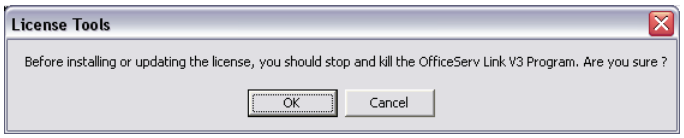
d. The License Tools program window will appear.



e. Type or paste the license key into the box below Enter License.

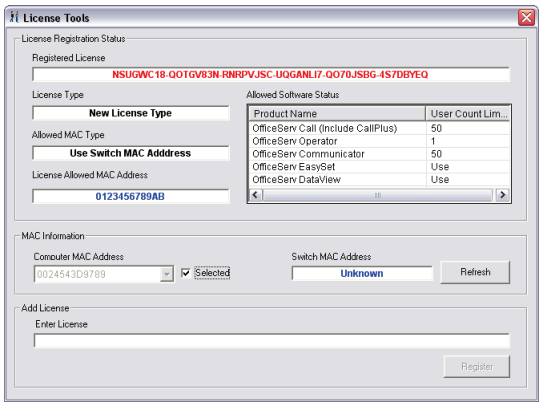


f. Click Register. A message will appear alerting you that you should make sure OfficeServ Link is not running. Click OK to proceed or click Cancel to back up and stop OfficeServ Link first.



g. After confirming that OfficeServ Link is not running a window will appear informing you that the license has been accepted and registered. If a failure message appears instead you will be given the opportunity to re-enter the license and try again.

h. The License Tools screen will update to show that your new license information has been successfully entered.



Be sure to retain a backup copy of your license key in the event of catastrophic failure of the OfficeServ Link PC.

Gathering Configuration Information

Configuration of OfficeServ Link happens in three steps:

1. Configure OfficeServ Link Options

2. Configure OfficeServ 7000 Series System Information

3. Configure Users

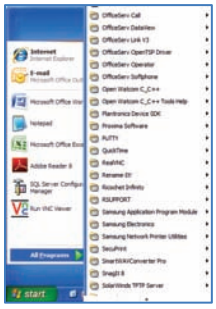
Link Options govern the behavior of the application itself and include such things as running OfficeServ Link as a service and automatic connection. System Information governs the settings used to connect OfficeServ Link to the OfficeServ 7000 Series of systems and includes such settings as system IP addresses and TCP/IP port numbers. User configuration is a largely optional series of settings, but allows you to specify how specific users connect to OfficeServ Link when more than one OfficeServ 7000 Series system is connected. Each section is covered in detail below.

In order to proceed with configuration you need to gather a couple pieces of information. You need to verify that the OfficeServ Link PC has ports 5002, 6000, 6001, 6002, and 6003 open on the firewall (if one is running). You also need to know the IP addresses of the OfficeServ 7000 Series systems you are connecting to.

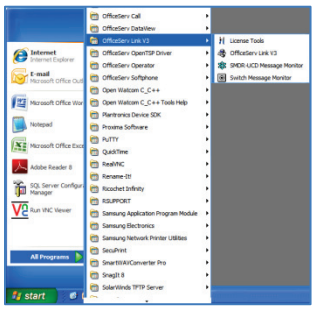
If you are connecting OfficeServ Link to multiple OfficeServ 7000 Series systems you will also need to know the IP addresses of any clients who will be connecting to a system other than the first. This is necessary so that OfficeServ Link can properly route each client to the correct OfficeServ 7000 Series system.

After obtaining all necessary information you can proceed with configuration by first launching OfficeServ Link:

1. Click Start, then click All Programs (or Programs if using the Classic Start Menu).



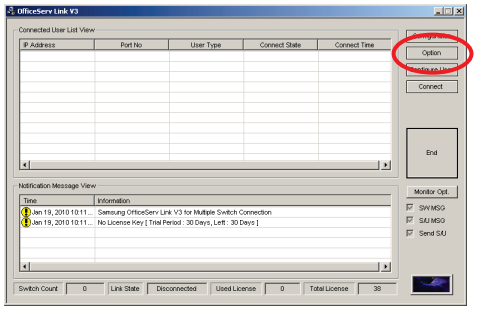
2. Click OfficeServ Link V3 (or the group set in step 6 of the Installation process).



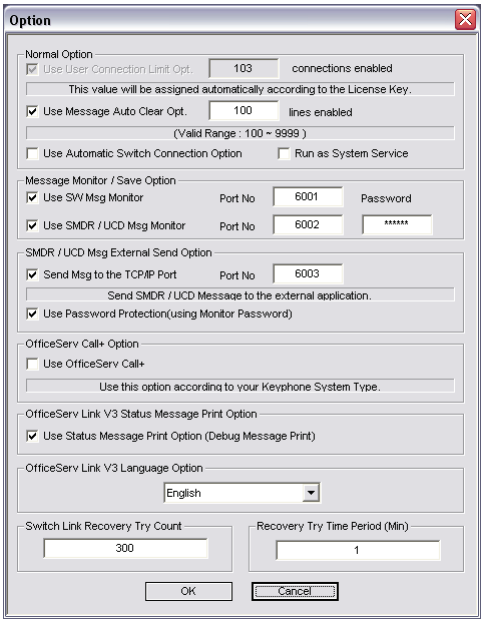
3. Click the OfficeServ Link V3 icon to launch the OfficeServ Link

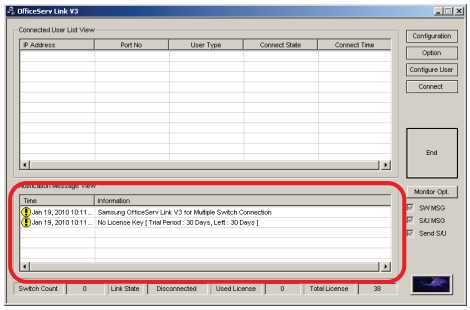
Configuring OfficeServ Link Options

From the main OfficeServ Link window click the "Option" button in the upper right hand corner of the window.



The Option window will appear. Initially this window may seem intimidating, but most settings will only require adjustment in a very small number of cases. The primary uses of this screen are to enable OfficeServ Link to auto-connect to the OfficeServ 7000 Series systems immediately after launching, and to enable it to run as a Windows service. A full explanation of each option is detailed below. After configuring all options click OK to save changes and return to the main application window.

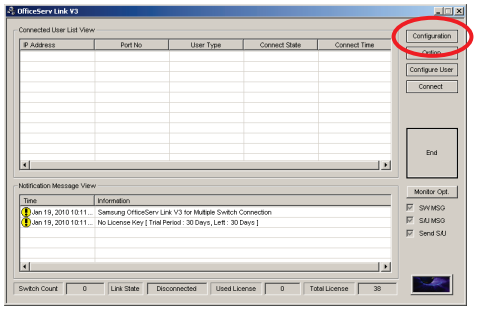


OPTION	DESCRIPTION
Use User Connection Limit Opt.	This setting is read only and tells OfficeServ Link to limit the number of CTI connections according to the license that is currently active.
connections enabled	This field is read only and shows the number of CTI connections allowed by the currently active license.
Use Message Auto Clear Opt.	Sets whether or not to clear old messages from the Notification Message View (highlighted below) automatically after a certain number of messages. The default setting is yes (checked). 
lines enabled	Sets the number of lines to show in the Notification Message View before clearing lines. The default setting is 100 lines.
Use Automatic Switch Connection Option	Determines if OfficeServ Link will automatically connect to the OfficeServ 700 Series system(s) upon starting or not. The default setting is no (unchecked).
Run as System Service	Determines if OfficeServ Link will run as a Windows service or not. Running as a service allows OfficeServ Link to start automatically with the computer without requiring a user to log in and start the application. The default setting is no (unchecked).
Use SW Msg Monitor	This setting is for troubleshooting use only and determines if OfficeServ Link will allow a technician to connect and monitor messages passed between OfficeServ Link and the OfficeServ 7000 series system(s). The default setting is yes (checked).
Port No	Sets the TCP/IP port number used by a technician to connect and monitor events passed between OfficeServ Link and the OfficeServ 7000 Series system(s). The default setting is 6001.
Use SMDR / UCD Msg Monitor	This setting is for troubleshooting use only and determines if OfficeServ Link will allow a technician to connect and monitor SMDR and UCD messages sent to OfficeServ Link by the OfficeServ 7000 Series system(s). The default setting is yes (checked).
Port No	Sets the TCP/IP port number used by a technician to connect and monitor SMDR and UCD messages sent to OfficeServ Link by the OfficeServ 7000 Series system(s). The default setting is 6002.
Password	Sets the password required to authenticate a technician attempting to connect and monitor SMDR and UCD messages sent to OfficeServ Link by the OfficeServ 7000 Series system(s). There is no default setting, and this field must be set by the user the first time the Option window is opened.
Send Msg to the TCP/IP Port	Determines if OfficeServ Link will transmit SMDR and UCD messages sent to OfficeServ Link by the OfficeServ 7000 Series system(s) to other user applications (such as call accounting packages). The default setting is yes (checked).
Port No	Sets the TCP/IP port number OfficeServ Link transmits SMDR and UCD messages sent to OfficeServ Link by the OfficeServ 7000 Series system(s) on. The default setting is 6003.
Use Password Protection(using Monitor Password)	Determines if user applications must use a password to connect to the above port. The password used will be the same as the password set for the "Use SMDR / UCD Msg Monitor" setting above. The default setting is yes (checked).
Use OfficeServ Call+	This setting is not for United States use and should be left at the default setting of no (unchecked).
Use Status Message Print Option (Debug Message Print)	Determines if debug log files will be created for OfficeServ Link. The default setting is yes (checked).
OfficeServ Link V3 Language Option	Sets the language used for the OfficeServ Link application. The default setting is English.
Switch Link Recovery Try Count	Set the number of times OfficeServ Link will attempt to reconnect to an OfficeServ 7000 Series system that has become disconnected. The default setting is 300.
Recovery Try Time Period (Min)	Set the interval (in minutes) between reconnection attempts. The default setting is 1 minute.

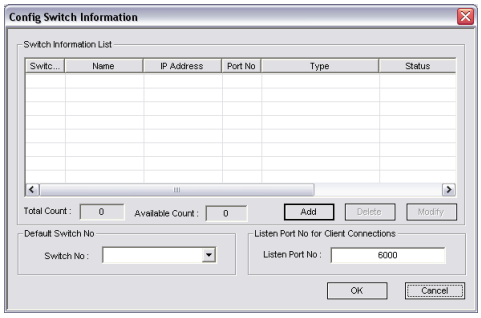
If any Port No settings are changed in the Options window you must restart OfficeServ Link for the changes to take effect.

Configuring OfficeServ 7000 Series System Information

From the main OfficeServ Link window click the "Configuration" button in the upper right hand corner of the window.



The Config Switch Information window will appear. This window is used to configure connection information for each OfficeServ 7000 Series system connected to OfficeServ Link. It also allows you to set the TCP/IP port OfficeServ Link will use to listen for CTI application connections. A full explanation of each option is detailed below. After configuring all options click OK to save changes and return to the main application window.

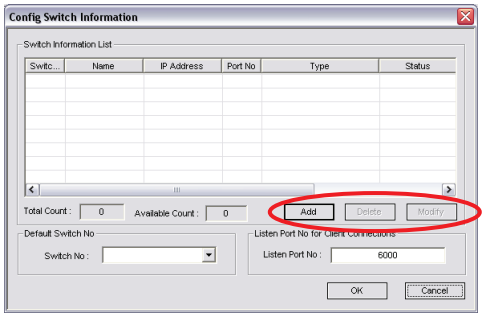


OPTION	DESCRIPTION
Switch Information List	This field displays the connection details for each OfficeServ 7000 Series system you have configured. Adding, deleting, and modifying system information is discussed below.
Total Count	This field is read only and shows the total number of systems in the Switch Information List.
Available Count	This field is read only and shows the number of systems in the Switch Information List that has "Usage" set to "Use". This means that when OfficeServ Link connects this is the number of systems it will try to connect to.
Default Switch No	When using more than one OfficeServ 7000 Series system this option sets the default system CTI applications will connect to when no specific system connection has been specified.
Listen Port No	Sets the TCP/IP port OfficeServ Link uses to listen for CTI application connections.

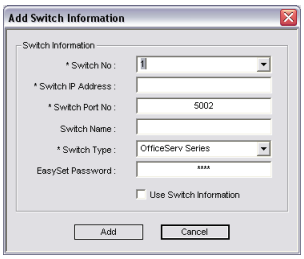
If the Listen Port No setting is changed in the Config Switch Information window you must restart OfficeServ Link for the change to take effect.

Adding, Deleting, and Modifying OfficeServ 7000 Series System Information

The Add, Delete, and Modify buttons allow you to configure OfficeServ 7000 Series system connections. Click Add to add a new system. Select an existing system from the Switch Information List and click Delete to remove the connection or click Modify to change the connection options.



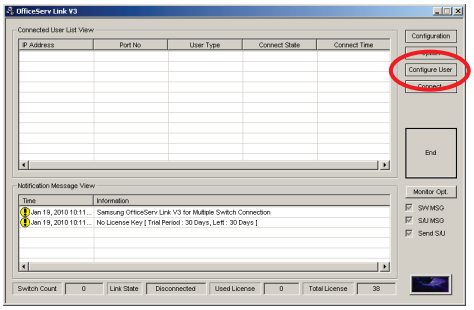
The Add / Modify Switch Information window contains the system-specific options used to connect to an OfficeServ 7000 Series system. A full explanation of each option is detailed below. After configuring all options click Add / Apply to save changes and return to the Config Switch Information window.



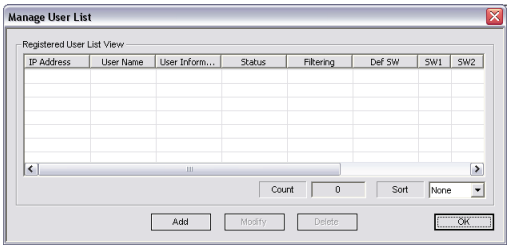
OPTION	DESCRIPTION
Switch No	This is a required field and specifies the system identifier to use for this OfficeServ 7000 Series system (1 through 8). This identifier is used to configure user connections in multi-system environments.
Switch IP Address	This is a required field and sets the IP address of the OfficeServ 7000 Series system processor card.
Switch Port No	This is a required field and sets the TCP/IP port number used to connect to the OfficeServ 7000 Series system. This value should be left at the default of 5002.
Switch Name	This optional field allows you to set a reference name to this OfficeServ 7000 Series system. This is useful in multi-system environments to allow you to quickly recognize a specific location's connection properties.
Switch Type	This is a required field and must be left at the default setting of OfficeServ Series. Other settings are not valid in the United States.
EasySet Password	This optional field allows you to specify the password used to connect the OfficeServ EasySet application to this OfficeServ 7000 Series system. This information is for reference only and is provided so you can see the correct password in the Switch Information List of the Config Switch Information window.
Use Switch Information	This field allows you to determine if this OfficeServ 7000 Series system is active. If this box is unchecked OfficeServ Link is unable to connect to the system.

Configuring Users

From the main OfficeServ Link window click the "Configure User" button in the upper right hand corner of the window.



The Manage User List window will appear. This window is used to manage users who connect to OfficeServ Link. Click the Add button to add a user. Select an existing user from the Registered User List View and click Delete to remove the user or click Modify to change the user's connection settings.



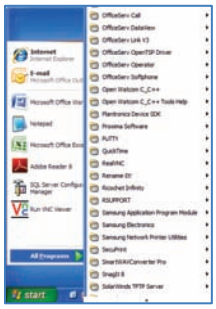
Clicking Add or Modify will display the Add User / Modify User Information window. This window is where you specify the connection properties for each user. A full explanation of each option is detailed below. After configuring all options click Add / Apply to save changes and return to the Manage User List window.

OPTION	DESCRIPTION
IP Address	This field is required and sets the IP address of the PC the user will be connecting from. This field requires an IP address, DNS names cannot be used.
User Name	This required field sets the name of the user, and is used as a way to identify the user from other users.
User Information	This optional field allows you to set a short description of the user (such as "Shawn's lab PC")
Switch Information	This field is used to determine which OfficeServ 7000 Series system(s) (1 through 8) the user can access information for. To enable a system select the system and click the "Use" button below the system list. Alternately you can double-click the Usage field next to the desired system.
Default SW	This field is required and sets which of the allowed systems will be the default. This is primarily used for the OfficeServ Call, OfficeServ Operator, and OfficeServ Communicator applications to set which system they will connect to (because these applications can connect to only 1 system at a time).
Use Filtering-Mode for OfficeServ Call	This option determines if the user's data stream will be limited to only the "Default SW" system's data. This is important for users of OfficeServ Call because the application can become unstable if it receives information from more than one system.

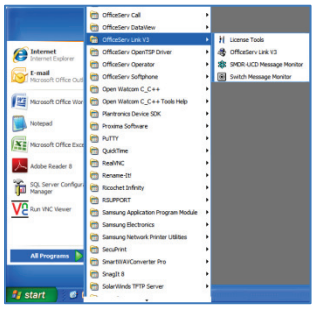
Connecting OfficeServ Link

In order to connect OfficeServ Link you must first launch the application:

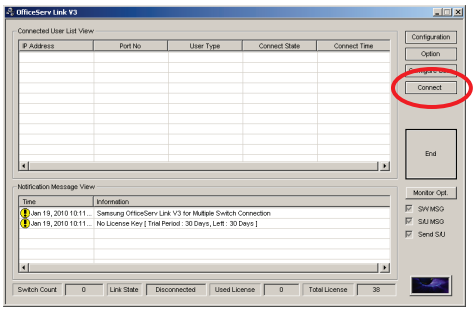
1. Click Start, then click All Programs (or Programs if using the Classic Start Menu).



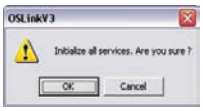
2. Click OfficeServ Link V3 (or the group set in step 6 of the Installation process).



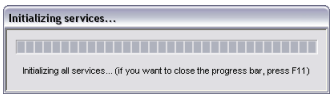
3. Click the OfficeServ Link V3 icon to launch the OfficeServ Link. The main Link window will appear. Click the "Connect" button in the upper right hand corner of the screen.



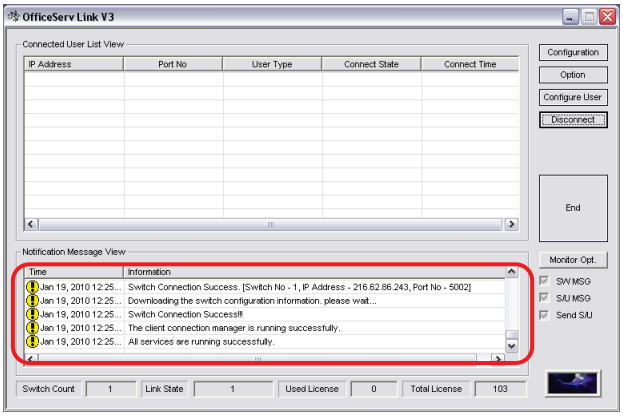
4. A confirmation prompt will appear.



5. Click OK to begin the connection process. A status bar will appear briefly as the OfficeServ 7000 Series system(s) connect.



6. The Notification Message View at the bottom of the window will display a series of status messages indicating the success or failure of the connection(s). If no errors have occurred the last message should say "All services are running successfully".



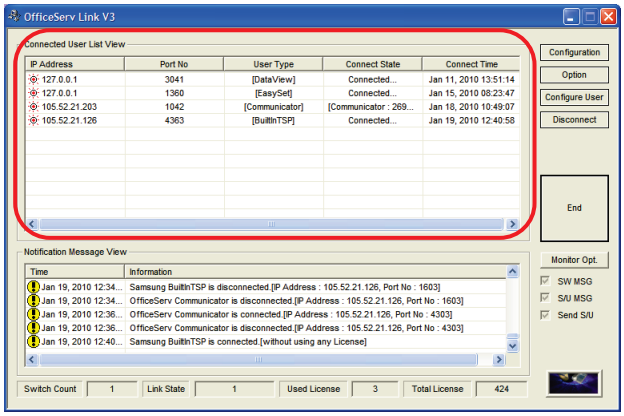
7. OfficeServ Link is now running and ready for applications to connect.

Managing User Connections

When OfficeServ Link is connected and running it is important to be able to manage users easily. OfficeServ Link provides at-a-glance information about connected users, a point-and-click interface for forcibly disconnecting users, and a hotkey-accessible window showing connected server applications.

Connected User List View

When OfficeServ Link is connected and running the Connected User List View will show you a variety of information about connected users, as described below.

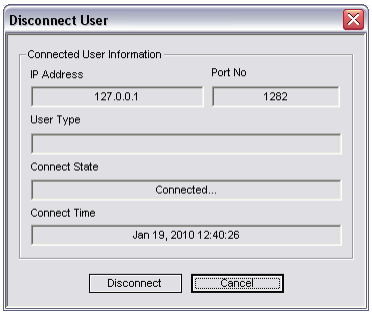


OPTION	DESCRIPTION
IP Address	This field shows the IP address the user is connecting from. Note that 127.0.0.1 means that the user is connecting from the OfficeServ Link PC. This is most often the case with OfficeServ EasySet and OfficeServ DataView.
Port No	This field shows the TCP/IP port number the user is connected with on the user's PC. Note that the connected port on the OfficeServ Link PC is always 6000 (unless otherwise specified in the Config Switch Information screen).
User Type	This field displays the type of application that is connected currently, such as EasySet, DataView, or Communicator. A value of BuiltinTSP means that a user is either connecting or has recently disconnected with OfficeServ Call, OfficeServ Operator, or OfficeServ Communicator.
Connect State	Shows the connection status of the user. In most cases this simply says "Connected…", but in the case of OfficeServ Call, OfficeServ Operator, and OfficeServ Communicator this field will also display which telephone and which OfficeServ 7000 Series system the user is attached to.
Connect Time	This field shows the time and date that the user initially connected to OfficeServ Link.

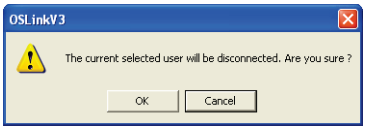
Disconnecting a User

Sometimes it is necessary to forcibly disconnect a user. This may be for security reasons or because a PC has locked up and the user connection is "stuck." The steps to disconnect a user are:

1. Double-click the user in the Connected User List View. This will open the Disconnect User window.



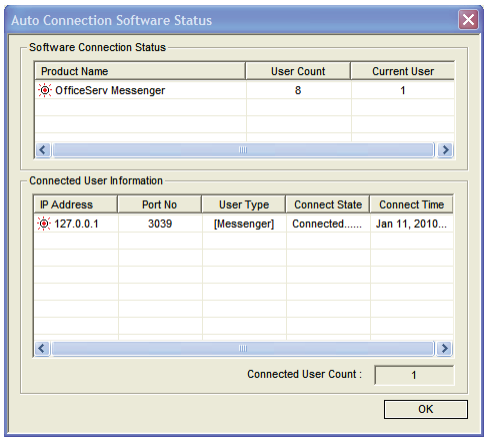
2. Click Disconnect. A confirmation will appear. Click OK to disconnect the user.



Viewing OfficeServ Messenger Connections

You may notice after launching and connecting the OfficeServ Messenger application that it does not appear in the Connected User List View. This is because although the OfficeServ Messenger connects through OfficeServ Link, it is not licensed by OfficeServ Link. Because of this it does not connect on the normal TCP/IP port 6000, but instead connects on port 6500 (which allows specific Samsung applications to connect through OfficeServ Link without using an OfficeServ Link license).

To check the status of an OfficeServ Messenger connection, press the F11 key from the main OfficeServ Link window. The Auto Connection Software Status window will appear.



The Connected User Information screen contains the same informational fields as the Connected User List View of the main OfficeServ Link window, and also allows you to double-click the user to forcibly disconnect them.

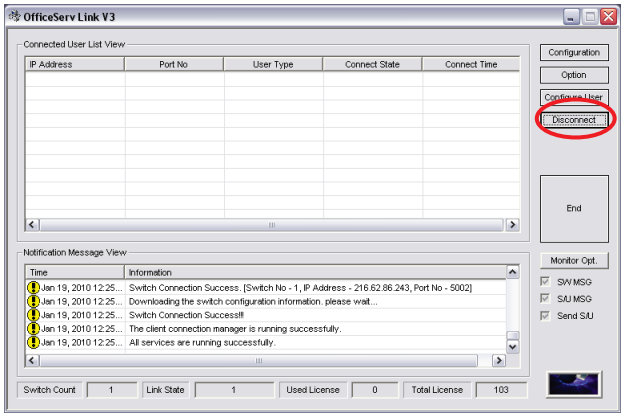
The Software Connection Status list at the top of the screen shows you the number of OfficeServ 7000 Series systems OfficeServ Messenger is licensed to connect to (User Count) and how many are connected (Current User).

Closing OfficeServ Link

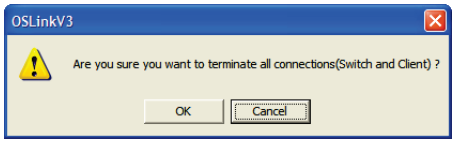
There are two methods to disconnect OfficeServ Link. One method is to sever the connection(s) and exit the application, the other method is to sever the connection(s) without exiting the application.

Disconnecting Without Exiting OfficeServ Link

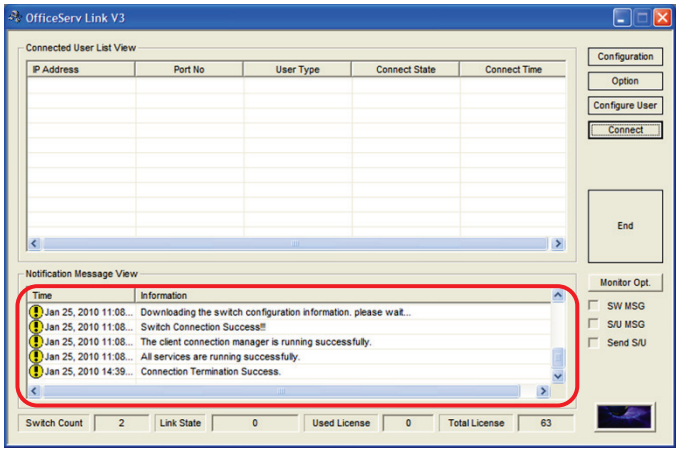
1. Press the "Disconnect" button in the upper right hand corner of the OfficeServ Link window.



2. A message box will appear asking you to confirm that you want to disconnect. Click OK to disconnect.

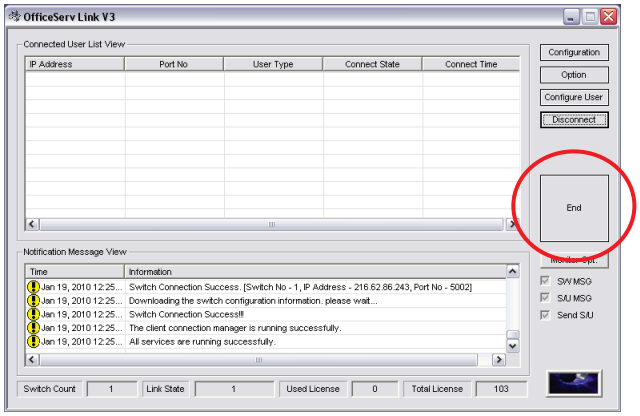


3. The Notification Message View at the bottom of the window will display a status message saying "Connection Termination Success".

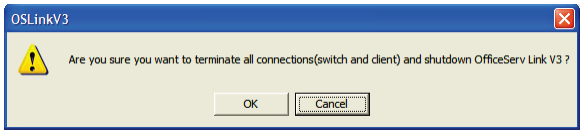


Disconnecting and Exiting OfficeServ Link

1. Press the "End" button on the right side of the OfficeServ Link window.



2. A message box will appear asking you to confirm that you want to disconnect and exit OfficeServ Link. Click OK and OfficeServ Link will silently disconnect and exit to your desktop.



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For OfficeServ CTI Applications for OfficeServ Keyphone Series

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