

Guide to Planning and Installing your Allworx System

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Customer Site Survey

Customer Information

Note: Affix Contact's business card here if available:

Company Name:

Primary Contact/Title:

Address:

Phone/Fax Number:

E-mail Address:

Company Website URL:



Business Type:

Part 1 - Employee and Location Information

- 1. Number of locations:
- 2. Address of locations:
- 3. Number of Employees:
- 4. Client Information: Please list Employee Information, including name and title, contact information, and email address:
- 5. Are there multiple offices Will you be interconnecting locations using our site-to-site feature (requires multiple Allworx Servers and a VOIP key)?
- 6. Are you going to have remote users or satellite offices (Requires multiple Allworx Servers and a VOIP key)?
- 7. What is your current site-to-site connection method (for example VPN)?



Part 2 - Phone System

Voice Service Delivery

- 1. Who currently is your supplier for Voice Service?
- 2. How is the current voice service delivered from your provider?
- 3. Do your currently send your voice over the Internet (VoIP, ie. Vonage, CallVantage)?
- 4. If so, who is your Internet Telephony Service Provider (ITSP)?
- 5. How many outside lines (also known as Central Office Lines) do you currently have?
- 6. How are the lines provisioned (DID, Inbound vs. Outbound)?
- 7. What features do you get from your telephone service provider?
- 8. How many Fax Lines do you currently have?
- 9. How many Alarm Lines do you currently have?
- 10. Will the Fax or alarm lines be connected through the Allworx server?



Current Phone System

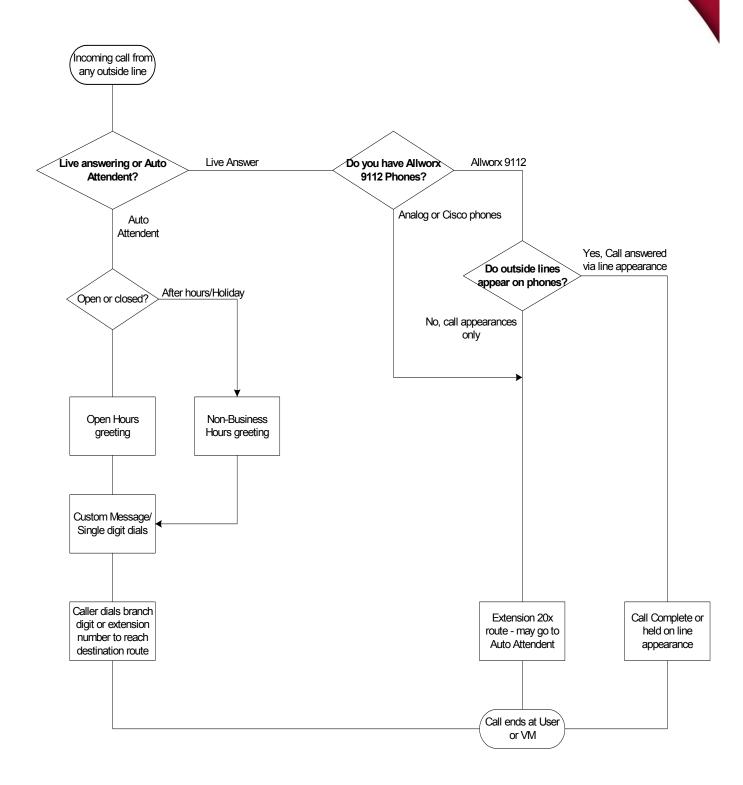
- 1. What is the manufacturer and model number of your current phone system (for example Toshiba, Nortel etc.)?
- 2. When did you purchase your existing system?
- 3. What do you like about your current system?
- 4. What do you dislike about your current system?
- 5. What is the manufacturer and model number of your phones (handsets)? Note: Proprietary handsets are not reusable in the Allworx system.
- 6. How many phones do you currently have?
- 7. What is the manufacturer and model number of your Wireless and Cellular phone?
- 8. How many Wireless/Cellular phones do you currently have?
- 9. How do you currently answer incoming calls?



Allworx Phone System Configuration

- 1. Describe how incomings calls will be handled during business and after hours (Use diagram on following page).
- 2. How many users/extensions will be required?
- 3. How many system extensions such as Conference rooms, Lobby phones etc. will be required?
- 4. What is the total number of phones required?
- 5. Are there special handset restrictions required (private lines or separate businesses)?
- 6. Will you require Service groups for Least Cost Long Distance route (outside resource seize order)?
- 7. Are there any Local Area Code dialing requirements (7, 10, or 11 digits)?



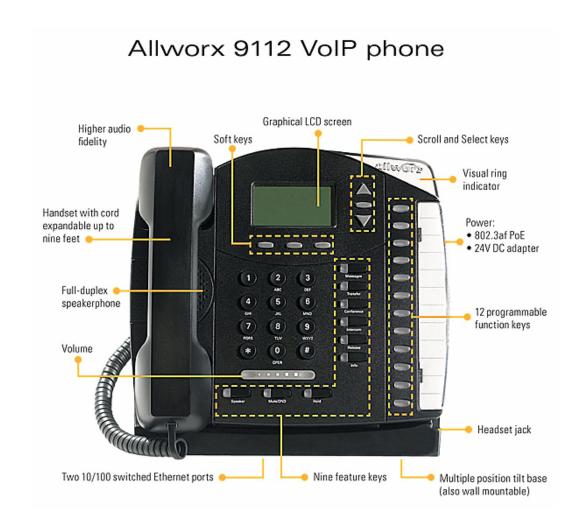




Phone System Features

Feature	Current System Yes/No	Desired Yes/No
Auto Attendant		
Call detail records		
Call Park/Retrieve		
Call Transfer (Blind/Announced)		
Call Waiting		
Caller ID		
Conference Calling		
Group Extensions/mailboxes. such as sales,		
service etc.		
Handset-Handset(s) paging		
Multiple Auto Attendants		
Music On-Hold/Custom On-Hold messages		
Overhead Paging		
Restricted outbound calling		
Shortcuts from Auto Attendants – single digit		
shortcuts such as sales, support, billing etc		
Voice Mail for users/# of ports		
	-	







Allworx 9102 VoIP phone Graphical LCD screen Soft keys Scroll and Select keys allworx Higher audio fidelity (Handset with cord Power: expandable up to • 802.3af PoE nine feet · 24V DC adapter (2) Full-duplex -Eight feature speakerphone 6 keys 8 9 Volume (0) 2 programmable function keys Headset jack Two 10/100 switched Ethernet ports Multiple position tilt base (also wall mountable)



Allworx Phone Definitions

Programmable Feature Keys (PFKs) – These are the buttons that will be programmed by your System Administrator in the configuration that best suits your needs. The 9112 model has twelve programmable buttons; the 9102 model has two programmable buttons. The following definitions, describe (in order of how they appear in the Web Administration on the Server) how each button can be configured. Following the descriptions is a worksheet that should be filled out for each user.

Line Appearance – When defined as a Line Appearance button, the user has the ability to monitor a specific outside line (FXO/DID loops). With an incoming call, all the users monitoring that specific outside line will have their phones ring. Unless you use the Hold function, selecting another line appearance line means that you will hang up on the first Line Appearance call. This is typically a Key System function. Line Appearance has a Ring Type associated with it and must be specified.

Ring Type – Allworx phones can ring with different patterns and tones. Ring Types are associated with Line Appearance and Call Appearance and must be specified.

Direct Station Selection/Busy Lamp Field (DSS/BLF) – When defined as a DSS/BLF button, you will have the ability to connect to another user's phone using the intercom channel and the ability to monitor the status of that users phone. (Note: In order for this button to work in DSS/BLF mode, the System Administrator must select Key System Mode when configuring the buttons).

Speed Dial/Busy Lamp Field – When defined as a SD/BLF button, you will have the ability to ring another user's extension and the ability to monitor the status of that user's phone. (Note: In order for this button to work in SD/BLF mode, the System Administrator must select PBX Mode when configuring the buttons).

Speed Dial – When defined as a Speed Dial button, you will have the ability to ring another user extension without having to dial the extension number.

Call Appearance – When defined as a Call Appearance button, you will have the ability to receive calls targeted for your extension. You may have multiple buttons configured for Call Appearance, which you can manage individually. For example, each call can be put on hold or transferred to another extension. Call Appearance has a Ring Type associated with it. Please see the description above for the Ring Types.

Function – A programmable button can be defined as a Function with the choices being Centrex Flash, Headset, Personal Speed Dial and Redial. When defined as line flash you can directly flash an outside phone line to access services provided by your phone company such as call forwarding, conferencing etc.

Headset – When defined as a Headset function, this button will allow you to transfer your conversation to a headset if connected.



Personal Speed Dial – When defined as a Personal Speed Dial function, this button will call your personal contacts such as home, a supplier or customer. The user, within the Configuration menu on the phone defines Personal Speed Dial numbers.

Redial – When defined as a Redial function, this button will redial the last call made by the user.

Not Used – When defined as Not Used, this button will not be usable by the user.



Allworx 9112 Phone Configuration

Employee Name:	
Employee Location:	

Button	Selection
PFK #12	Line Appearance (include Ring Type)
	 BLF (Speed Dial when in PBX Mode/Direct Station Selection when in Key System Mode
	○ Speed Dial
	 Call Appearance (include Ring Type)
	 Function (Select one of the following: Centrex Flash, Headset, Personal Speed Dial, Redial)
	o Not Used
PFK #11	Line Appearance (include Ring Type)
	 BLF (Speed Dial when in PBX Mode/Direct Station Selection when in Key System Mode
	○ Speed Dial
	 Call Appearance (include Ring Type)
	 Function (Select one of the following: Centrex Flash, Headset, Personal Speed Dial, Redial)
	○ Not Used
PFK #10	Line Appearance (include Ring Type)
	 BLF (Speed Dial when in PBX Mode/Direct Station Selection when in Key System Mode
	∘ Speed Dial
	 Call Appearance (Include Ring Type)
	 Function (Select one of the following: Centrex Flash, Headset, Personal Speed Dial, Redial)
	○ Not Used
PFK #9	Line Appearance (include Ring Type)
	BLF (Speed Dial when in PBX Mode/Direct Station Selection



	when in Key System Mode
	∘ Speed Dial
	 Call Appearance (include Ring Type)
	 Function (Select one of the following: Centrex Flash, Headset, Personal Speed Dial, Redial)
	○ Not Used
PFK #8	 Line Appearance (include Ring Type)
	 BLF (Speed Dial when in PBX Mode/Direct Station Selection when in Key System Mode
	o Speed Dial
	 Call Appearance (include Ring Type)
	 Function (Select one of the following: Centrex Flash, Headset, Personal Speed Dial, Redial)
	○ Not Used
PFK #7	Line Appearance (include Ring Type)
	 BLF (Speed Dial when in PBX Mode/Direct Station Selection when in Key System Mode
	○ Speed Dial
	 Call Appearance (include Ring Type)
	 Function (Select one of the following: Centrex Flash, Headset, Personal Speed Dial, Redial)
	○ Not Used
PFK #6	 Line Appearance (include Ring Type)
	 BLF (Speed Dial when in PBX Mode/Direct Station Selection when in Key System Mode
	o Speed Dial
	o Call Appearance (include Ring Type)
	 Function (Select one of the following: Centrex Flash, Headset, Personal Speed Dial, Redial)
	o Not Used
PFK #5	 Line Appearance (include Ring Type)
	 BLF (Speed Dial when in PBX Mode/Direct Station Selection



	when in Key System Mode
	∘ Speed Dial
	 Call Appearance (include Ring Type)
	 Function (Select one of the following: Centrex Flash, Headset, Personal Speed Dial, Redial)
	∘ Not Used
PFK #4	Line Appearance (include Ring Type)
	 BLF (Speed Dial when in PBX Mode/Direct Station Selection when in Key System Mode
	○ Speed Dial
	 Call Appearance (include Ring Type)
	 Function (Select one of the following: Centrex Flash, Headset, Personal Speed Dial, Redial)
	o Not Used
PFK #3	 Line Appearance (include Ring Type)
	 BLF (Speed Dial when in PBX Mode/Direct Station Selection when in Key System Mode
	∘ Speed Dial
	 Call Appearance (include Ring Type)
	 Function (Select one of the following: Centrex Flash, Headset, Personal Speed Dial, Redial)
	○ Not Used
PFK #2	Line Appearance (include Ring Type)
	 BLF (Speed Dial when in PBX Mode/Direct Station Selection when in Key System Mode
	○ Speed Dial
	o Call Appearance (include Ring Type)
	 Function (Select one of the following: Centrex Flash, Headset, Personal Speed Dial, Redial)
	○ Not Used
PFK #1	Line Appearance (include Ring Type)
	 BLF (Speed Dial when in PBX Mode/Direct Station Selection



when in Key System Mode

- o Speed Dial
- o Call Appearance (include Ring Type)
- Function (Select one of the following: Centrex Flash, Headset, Personal Speed Dial, Redial)
- Not Used









Allworx 9102 Phone Configuration

Employee Name:	
Employee Location:	

Button	Selection	
PFK #2	Line Appearance (include Ring Type)	
	 BLF (Speed Dial when in PBX Mode/Direct Station Selection when in Key System Mode 	
	∘ Speed Dial	
	 Call Appearance (include Ring Type) 	
	 Function (Select one of the following: Centrex Flash, Headset, Personal Speed Dial, Redial) 	
	o Not Used	
PFK #1	Line Appearance (include Ring Type)	
	 BLF (Speed Dial when in PBX Mode/Direct Station Selection when in Key System Mode 	
	○ Speed Dial	
	 Call Appearance (include Ring Type) 	
	 Function (Select one of the following: Centrex Flash, Headset, Personal Speed Dial, Redial) 	
	o Not Used	



Part 3 - IT Environment

Use the Network Topology diagrams as discussion points and examples of typical configurations, and attach to survey.

- 1. Who services your network?
- 2. Who is your Internet Service Provider?
- 3. What type of connection to your site?
 - o T1, DSL, Cable Modem
 - o What is the Speed and Bandwidth?
- 4. What is the manufacturer and model of your modem/IAD?
- 5. Addresses from ISP?
 - o Static IP address
 - o Subnet Mask
 - o Primary & Secondary DNS servers
- 6. Do you have any network devices (Firewall, Router, Switch)?
- 7. If so, what are the manufacturer and model numbers?



8. Please diagram the network topology.







.... Allworx Planning Guide

- 9. What is the Network Server?
- 10. Who hosts your website?
- 11. What is the format of your website (FrontPage, Coldfusion, etc)?
- 12. Where is your email hosted and how do you currently receive you mail?
- 13. What is the number of E-mail users?
- 14. Will you use Allworx as your primary mail server or web site host?
- 15. Are there any other Servers/Applications?
- 16. Will Allworx be the main gateway to the Internet or will it be a device on another network?
 - o Main Router/Firewall
 - o Host on LAN



Part 4 – Allworx Client Application

The Allworx E-mail Client Application gives users the ability to have Calendaring, Unified Messaging, and Contacts.

The Calendar function allows the user to create and manage their business and personal activities, events, and meetings.

The Contacts function allows the user to create and manage their personal contacts, contact groups, and access company contacts.

The Unified Messaging allows the user to access and manage their voice and email in one inbox. Unified Messaging requires the use of a messaging POP3 compatible E-mail client tool such as the Allworx Client Mail tool, Microsoft Outlook Express or Outlook, or Lotus Notes and a media player such as RealAudio, Liquid Audio, or Microsoft Player (format of audio is .wav) along with a functioning audio card and speakers.

Note: A majority of Allworx customers leverage their existing E-mail client rather than porting all their data into the Allworx E-mail client.

User workstations/OS/Apps

- 1. What is the total number of Workstations?
- 2. What are the Vendor and OS versions (such as Windows XP or Windows 2000)?
- 3. What are the current PC/Workstation Hardware including RAM, Disk Space and Network Interface Card?
- 4. What is the current Browser Software? Note: Allworx Clients are compatible with Windows 2000 and XP; Administration can be done via any web browser.



Part 5 - Physical Infrastructure

- 1. Where will the Allworx unit be installed? Note: The Allworx can be installed in a 19" rack, wall or tabletop mounted.
- 2. Where is the Demarcation Location (Point of phone service delivery)?
- 3. Will new wiring be required? Note: Allworx requires RJ-11 two wire, center pair plugs for all analog telephony connections.
- 4. Does any existing wiring need to be re-located?
- 5. Will new wiring be required for Network or VOIP Phones? Note: Allworx requires CAT5 or better cabling for Network devices.
- 6. Is adequate backed up power available (separate breaker recommended with some form of UPS)?



Part 6 - Documentation

Documentation and Software is available at:

http://www.allworx.com/XQ/ASP/p.84/QX/default.htm

The following documentation is on our website:

- Installation Instructions
- Administrator's Guide
- User's Guide
- Service Manual
- Voicemail Reference Guide
- Auto Attendant
- Backup and Restore
- Business Information
- Guide to New Features (Server Release 4.5)
- Guide to New Features (Server Release 4.6)
- Phone Setup
- Backup and Restore Without Client
- Phone Guide for 9102 and 9112 (will be available)

The following software is on our website:

- Release Server Software 4.6.2
- Release Client Software 4.6.1
- Pre-Release Server Software 5.0.0.18 (must be used when installing Allworx VOIP Phones)
- Pre-Release Client Software 5.0.0.7 (must be used with Server software 5.0.0.15)



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Name:	Date:
Approved	
Name:	Date:



Part 7 - Quick Guide to Administration

The following will serve as a step by step guide through a typical installation. For a detailed description of administrative tasks refer to the System Administrator's Guide.

Before connecting the server to the customer's network, follow steps 1- 11 and reset the unit.

- Connect a workstation to the LAN side of the Allworx unit and ensure the workstation is on the same logical subnet as the Allworx server LAN (Default= 192.168.2.254).
- 2. Using a web browser such as Internet Explore, browse to http://192.68.2.254:8080.
- 3. Enter the administrator's password (factory default password is admin).
- 4. Update server to latest firmware release if required (Available at http://www.allworx.com/XQ/ASP/p.84/QX/default.htm
- 5. Set time on server; (Maintenance, Time).
- 6. Program network security mode and addresses per desired network configuration; (Network, Security).
- 7. Enter server domain and host name; (Network, Addresses).
- 8. Enable/Disable DHCP server; (Servers, DHCP).
- 9. Set DNS server addresses provided by you ISP or network administrator; (Servers, DNS).



- 10. Verify/Enter any features keys that are required; (Maintenance, Feature Keys).
- 11. Enable VPN if required; (Network, VPN).
- 12. Reset server for settings to take effect; (Maintenance, Restart).
- 13. Log in to server and add handsets; (Phone System, Handsets).
- 14. Add users with primary extensions; (Business, users) and system extensions (Phone system, extensions).
- 15. Any phone can be checked by dialing 400, #7.
- 16. Program operator(0) route(s) and create 200 series extension if customer will be live answering; (Phone system, extensions, add/modify).
- 17. Add outside lines to phone system; (Phone system, Outside lines) and define call routing inbound calls can be routed to any AA or to a 200 series extension for line answer.
- 18. Check/Set Company business hours; (Business, Hours).
- 19. Record AA prompts for business if require; From any phone Dial 431, #9, enter admin password followed by #, then follow prompts.
- 20. Review dialing rules for home and remote area codes; (Phone system, dialing rules).
- 21. Make several inbound and outbound calls to test the phone system.



- 22. Perform an OfficeSafe backup; (Use OfficeSafe application, Start services, Backup now).
- 23. Optional Create custom service groups to control outside line access; (Phone System, Dialing rules).
- 24. Optional Check handset permissions to restrict outside access; (Phone System, handsets).
- 25. Optional Enable file server, set workgroup name; (Servers, File server).
- 26. Optional Mail Server
 - Leave mail relay turned off, unless server is within firewall!
 - Enter alternate email domains
 - Enter any spam blocking services (spamhaus.org, etc)
- 27. Deliver user documentation (Welcome sheet, VM guide and phone manual) and conduct basic training.

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