



Excendia Software Installation & Configuration Guide

Version 5.5.8

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Excendia Software Installation Guide

1 Prerequisites Checklist

1.1 Hardware requirements

- ☐ Intel Pentium Quad Core or equivalent processor
- ☐ A minimum of 4GB of RAM. More RAM means better performance and faster response time.
- ☐ A minimum of 250MB of free disk space. The amount of additional disk space required varies depending on the number of subscribers and calls handled.

1.2 Software requirements

- ☐ Windows 2003 Server (Standard Edition with the latest Service Pack) installed on the target computer
- ☐ The following Windows components must be installed (Step 3 lists these requirements):
 1. ASP.NET
 2. IIS Server with the following IIS components:
 - Common Files
 - FrontPage 2002 Server Extensions
 - World Wide Web Service
 - Internet Information Services Manager
 - Active Server Pages
 - Server Side Includes
 - Remote Administration (HTML)
- ☐ IBM WebSphere Voice Server ASR and TTS speech engines compatible with MRCP

1.3 Other requirements

- ☐ User name and password of the local machine administrator.
- ☐ Excendia Setup installation program
- ☐ A valid License Key from Excendia.

2 Software Download Instructions

Go to the Excendia software download site at the following address:

<http://download.excendia.com/>

Download the **Excendia Software Installation** file.

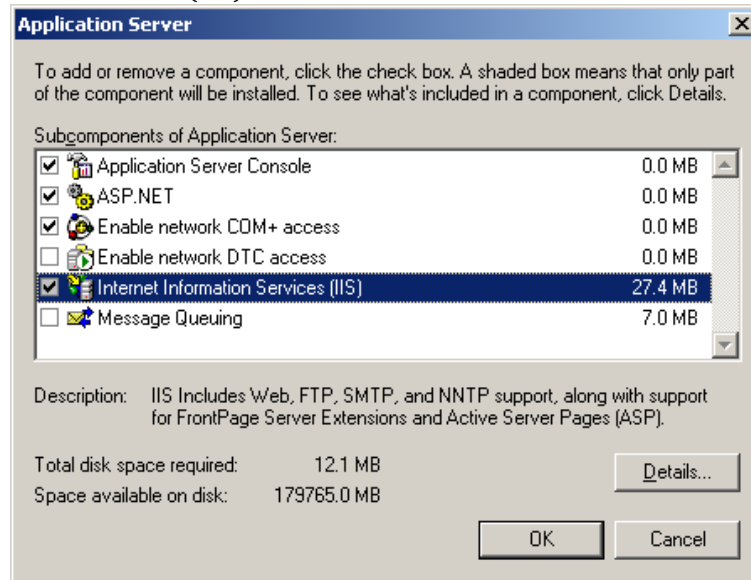
3 Installation and Configuration

3.1 Pre-installation

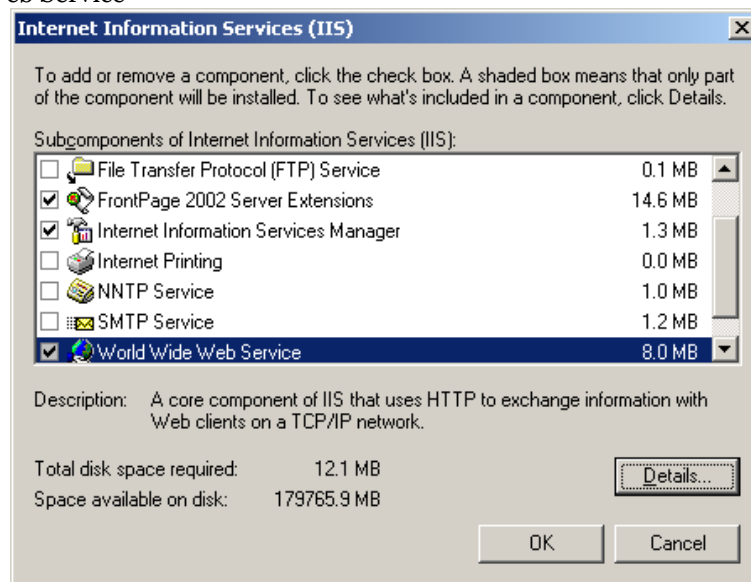
This section describes how to install Windows IIS and its required components (listed in section 1.2 above):

1. Go to **Start -> Control Panel -> Add or Remove Programs**
2. Click **Add/Remove Windows Components**
3. Check ☒ the Application Server checkbox and click **Details...**

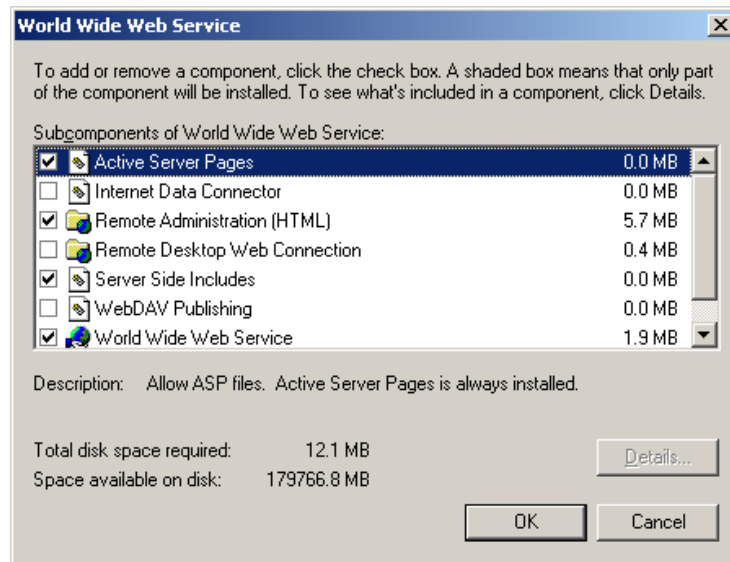
4. Check ☒ the following components:
- ASP.NET
 - Internet Information Services (IIS)



5. Click **Details** for Internet Information Services (IIS) and check ☒ the following components:
- Common Files
 - FrontPage 2002 Server Extensions
 - Internet Information Services Manager
 - World Wide Web Service



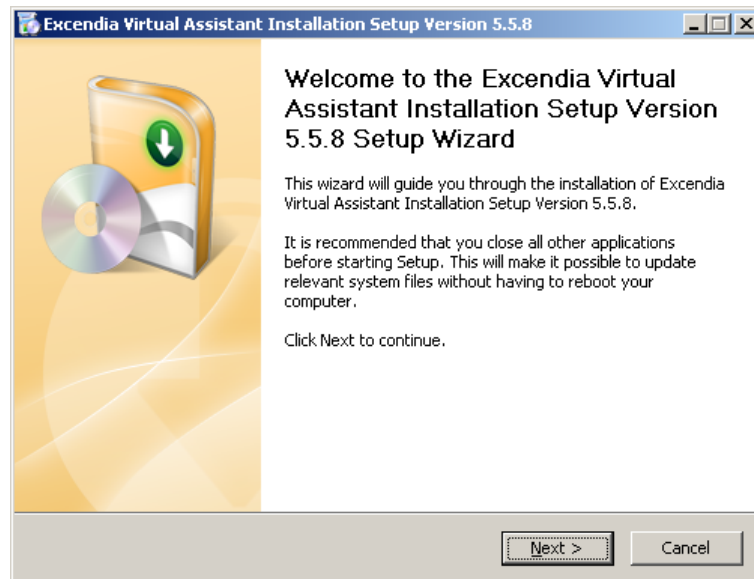
6. Click **Details** for World Wide Web Service and check ☒ the following components:
- Active Server Pages
 - Remote Administration (HTML)
 - Server-Side Includes



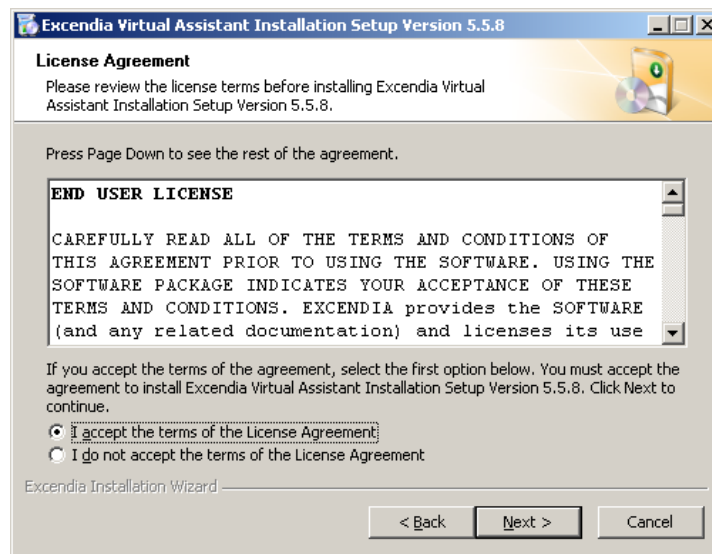
Once the installation of the IIS and its components is complete, you can start installing Excendia.

3.2 Login & Start Installation

1. From your installation computer, log in as the Local Administrator.
2. Extract the downloaded file and double click on **ExcendiaSetup.exe**. The Setup will first install, if not already installed, the Microsoft .Net Framework Package and the Microsoft SQL Server 2000 Desktop Engine (MSDE 2000).

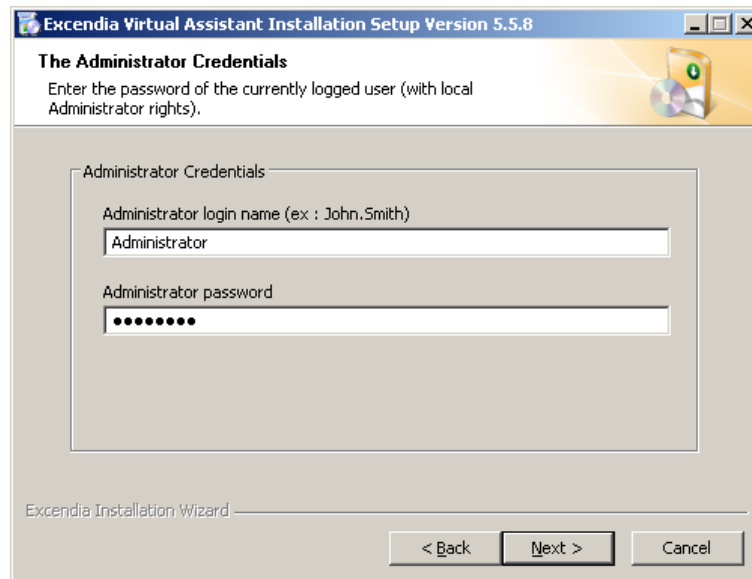


3. Read and accept the license agreement to continue the installation



3.3 Machine Administrator Credentials

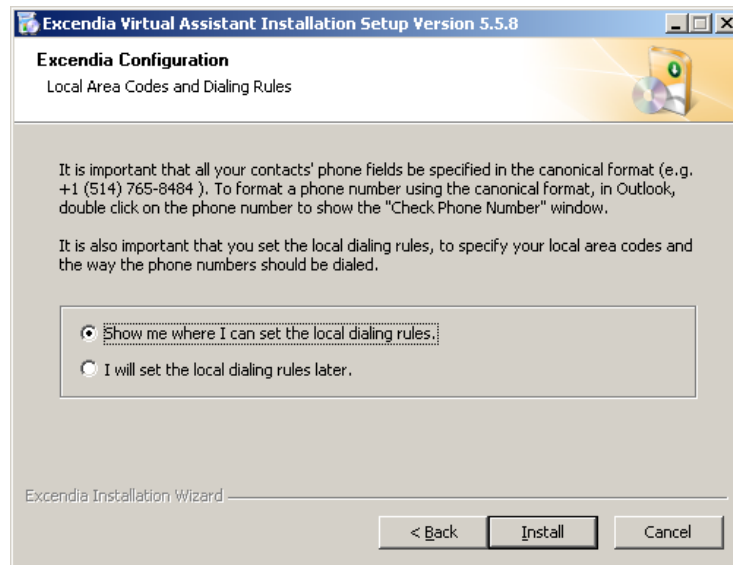
The Administrator Credentials section is where you enter the user name and password of the local machine administrator. This is required to launch and run the Excendia Software applications.



Click **Next** to continue the Excendia installation and configuration.

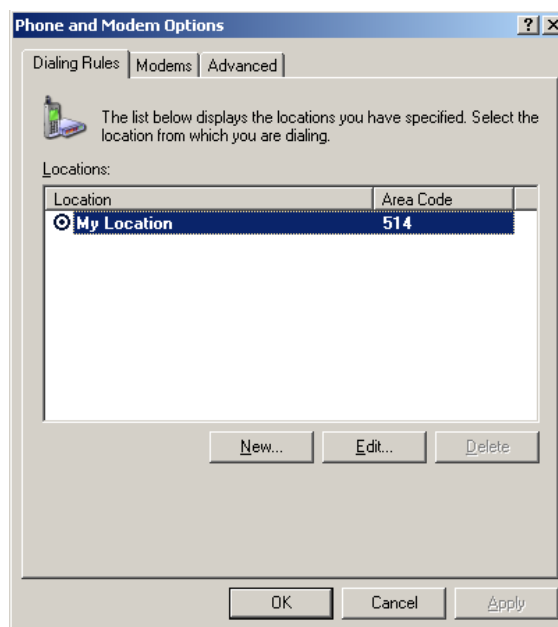
3.4 Local Area Codes and Dialing Rules

You are now asked to enter the dialing rules so that Excendia can properly dial numbers in your area. You may choose to configure these during or after the installation. Selecting "Show me where I can set the local dialing rules" will display the Local Information window.



3.5 Regional TAPI Telephony Settings

You need to configure the TAPI Telephony Settings for the region where the Excendia system is installed. Check if these settings have not been configured already.



For instructions on how to configure these parameters, go to the TAPI Configuration appendix at the end of this installation guide. Here is a summary list of the tasks to do:

- (1) Double-click on your location. If it does not exist, click **New** to enter a new location name and select the Country/region and area code where Excendia is being installed.
- (2) Select the **Area Code Rules** tab and press **New...** to enter the dial settings of your location.
- (3) If you have another area code, select a new area code and specify the prefixes to be used for this area code.
- (4) If you have a list of prefixes to be used for this rule, enter them altogether by pressing the **Add...** button.

You can find telephone prefixes and other tariff information at <http://www.localcallingguide.com/> or by searching for "local calling guides" on the web.

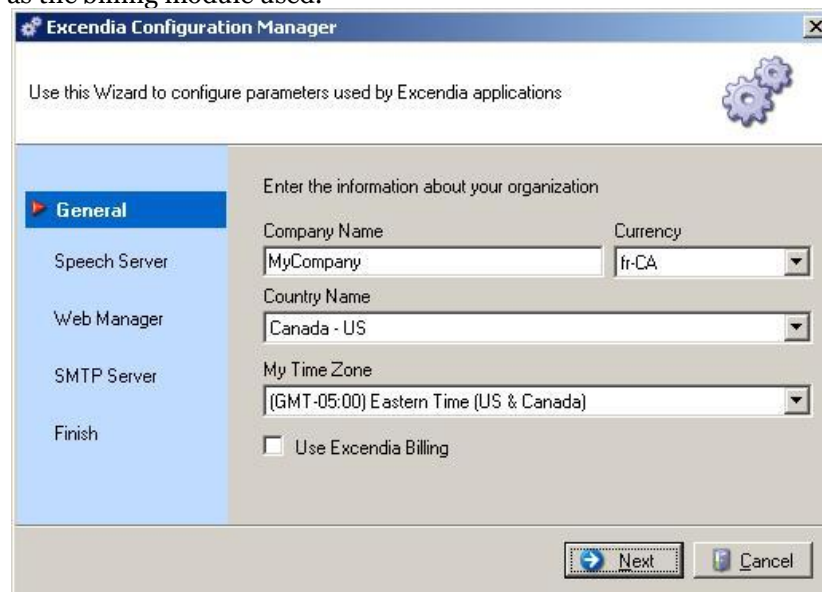


3.6 Excendia Configuration

As a first step, the installation program launches the Excendia Configuration Manager to help you configure your Excendia system.

3.6.1 General

In the **General** section, enter the required information about your organization and specify the time zone, currency and country where the Excendia system is installed as well as the billing module used.



3.6.2 Speech Server

In the **Speech** Server section, select from the list or enter the speech server name then specify the TTS and ASR languages

The screenshot shows the 'Excendia Configuration Manager' window with the 'Speech Server' tab selected. The window title is 'Excendia Configuration Manager' and it includes a subtitle 'Use this Wizard to configure parameters used by Excendia applications'. On the left, a sidebar lists 'General', 'Speech Server' (selected), 'Web Manager', 'SMTP Server', and 'Finish'. The main area contains a 'Speech Server Name' dropdown menu with 'Speech' selected and a 'Refresh' button. Below this are two sections: 'TTS Languages' and 'ASR Languages'. Each section has two dropdown menus: 'English' (with 'en-US' selected) and 'French' (with 'fr-CA' selected). At the bottom, there are 'Previous', 'Next', and 'Cancel' buttons.

3.6.3 Web Manager

Use the **Web Manager** tab to specify the URL of the Web Portal used by users and administrators to access and manage their Excendia accounts.

Notes:

- ☐ This is not the Signup web site.
- ☐ Check “Show Credentials” to view the credentials to access your newly installed Excendia system from the Web and by phone.

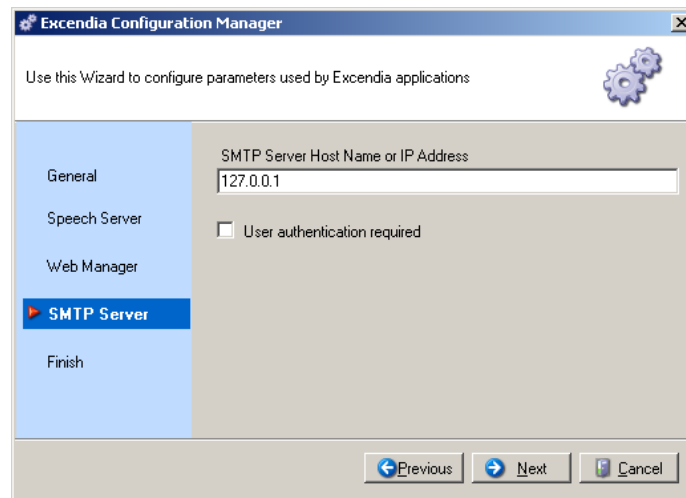
The screenshot shows the 'Excendia Configuration Manager' window with the 'Web Manager' tab selected. The window title is 'Excendia Configuration Manager' and it includes a subtitle 'Use this Wizard to configure parameters used by Excendia applications'. On the left, a sidebar lists 'General', 'Speech Server', 'Web Manager' (selected), 'SMTP Server', and 'Finish'. The main area contains a text field for 'Enter the Excendia Web Manager URL' with the value 'http://chevalley/Mobility/'. Below this is a 'Note' section stating: 'Your Excendia Web Manager will not be accessible from outside your internal corporate network unless you configure it as a public Web site.' Below the note is a checkbox labeled 'How to login on Web Manager for the first time?' which is checked, and a 'Show Credentials' button. Below this is a table with the following data:

	Account	User ID	PIN
▶	System Administrator	excendia	excendia
	Var Administrator	var	excendia
	Company Administr...	company	excendia
	User Test	2000	2000

At the bottom, there are 'Previous', 'Next', and 'Cancel' buttons.

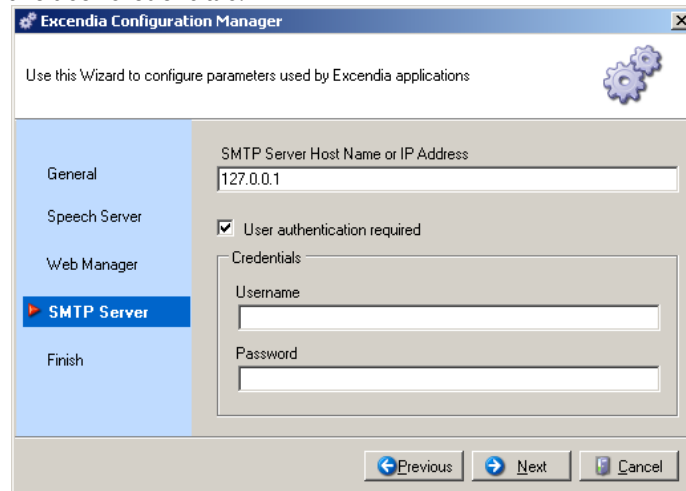
3.6.4 SMTP Server

Select **SMTP** to specify the mail server used by Excendia to send emails



The screenshot shows the 'Excendia Configuration Manager' window. The left sidebar has a blue bar with the following options: General, Speech Server, Web Manager, **SMTP Server** (highlighted with a red arrow), and Finish. The main area is titled 'SMTP Server Host Name or IP Address' and contains a text box with '127.0.0.1'. Below this is a checkbox labeled 'User authentication required' which is currently unchecked. At the bottom are three buttons: 'Previous', 'Next', and 'Cancel'.

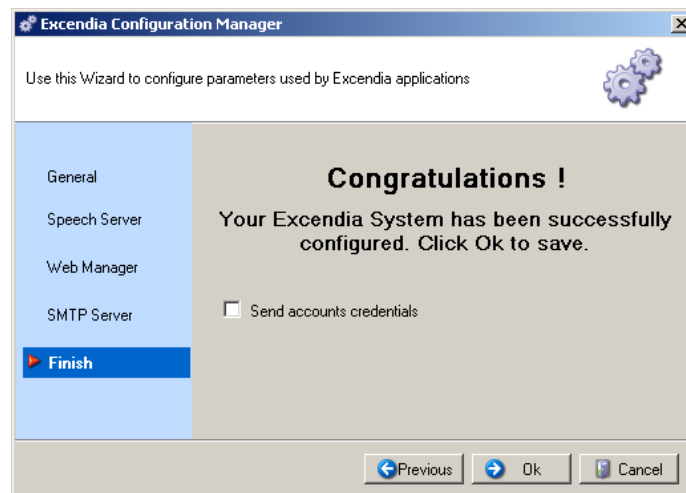
If the SMTP server requires authentication, check User authentication required to enter the user credentials.



This screenshot is similar to the previous one, but the 'User authentication required' checkbox is now checked. Below the checkbox is a section titled 'Credentials' containing two text boxes: 'Username' and 'Password'. The rest of the interface, including the sidebar and bottom buttons, remains the same.

3.6.5 Save the Excendia Configuration Parameters

Click **Ok** to save the configuration



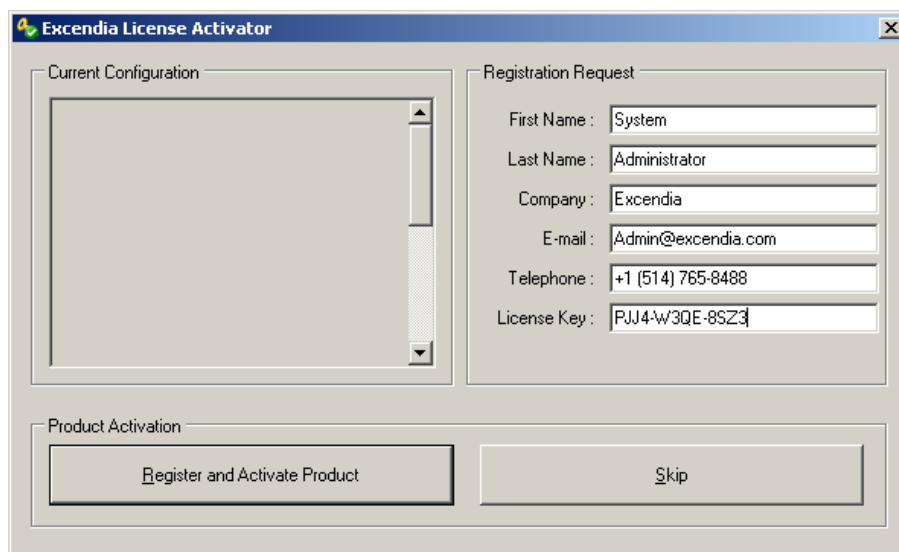
The screenshot shows the 'Finish' screen of the 'Excendia Configuration Manager'. The left sidebar now has 'Finish' highlighted with a red arrow. The main area displays a large 'Congratulations !' message followed by 'Your Excendia System has been successfully configured. Click Ok to save.' Below this is a checkbox labeled 'Send accounts credentials' which is unchecked. At the bottom are three buttons: 'Previous', 'Ok', and 'Cancel'.

3.7 Excendia Licensing

As a second step, the installation program launches the Excendia License Activator to help you register and activate licenses for your Excendia system. The product registration and activation are done automatically via internet using the license key provided to you when you purchased your Excendia software.

Note that you can click **Skip** to skip this step for now. You will be able to run the Excendia Licensing utility later from the Windows Start Menu. **Start -> Excendia -> Settings -> Licensing**

If you are ready to activate your Excendia product, enter the information required then click on **“Register and Activate Product”**.

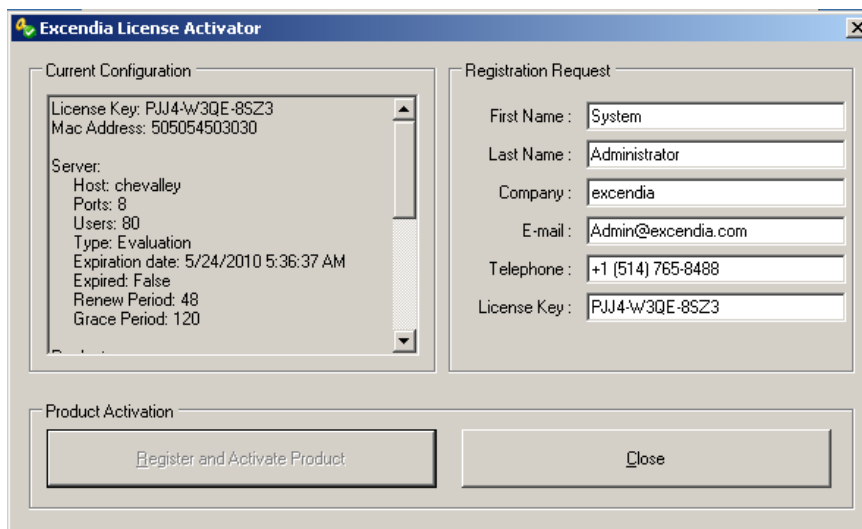


The dialog box titled "Excendia License Activator" is divided into two main sections. The left section, labeled "Current Configuration", contains a large empty rectangular area. The right section, labeled "Registration Request", contains several text input fields: "First Name" (filled with "System"), "Last Name" (filled with "Administrator"), "Company" (filled with "Excendia"), "E-mail" (filled with "Admin@excendia.com"), "Telephone" (filled with "+1 (514) 765-8488"), and "License Key" (filled with "PJ4-W3QE-8SZ3"). At the bottom, there are two buttons: "Register and Activate Product" and "Skip".

Once the licenses have been successfully activated, you should get a dialog box with the **“Licenses successfully activated”** message:



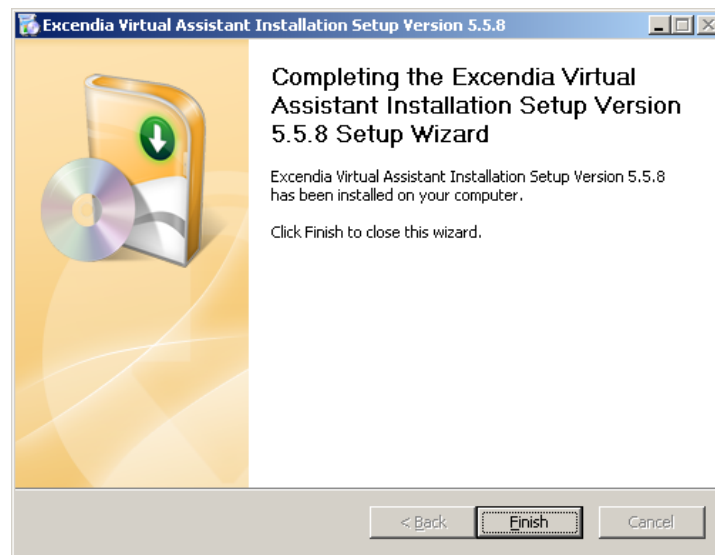
Review the information about your Excendia licenses, then press **Close** to exit the Excendia License Activator and continue your installation.



The dialog box titled "Excendia License Activator" is divided into two main sections. The left section, labeled "Current Configuration", contains a list of details: "License Key: PJ4-W3QE-8SZ3", "Mac Address: 505054503030", "Server:" followed by "Host: chevalley", "Ports: 8", "Users: 80", "Type: Evaluation", "Expiration date: 5/24/2010 5:36:37 AM", "Expired: False", "Renew Period: 48", and "Grace Period: 120". The right section, labeled "Registration Request", contains the same text input fields as the first dialog box, with the "License Key" field now filled with "PJ4-W3QE-8SZ3". At the bottom, there are two buttons: "Register and Activate Product" and "Close".

3.8 Finish Installation

Click on **Finish** to complete the Excendia Software Installation.



The installation of Excendia is now complete.

IMPORTANT: Go to **Start -> All Programs -> Excendia** to access the following Excendia Software tools:

- **Monitor**
- **Web Manager**
- **Settings**
 - Configuration
 - Licensing
 - Uninstall
- **Backup**
- **User Guides**
 - Billing
 - Getting Started
 - Integration
 - Private Label
 - Provisioning

4 Firewall Configuration

The following ports should be open on the firewall protecting the Windows Server running the Excendia software (VoiceXML server and application modules):

Port Name	Port Number	Excendia Usage
SIP Port	UDP 5060	to accept and make SIP calls
RTP Ports	44000 – 45000	to exchange audio during SIP calls
RTP Ports	52000 – 54000	to receive audio from the TTS server
Web Manager Port	80	to accept Web Manager sessions

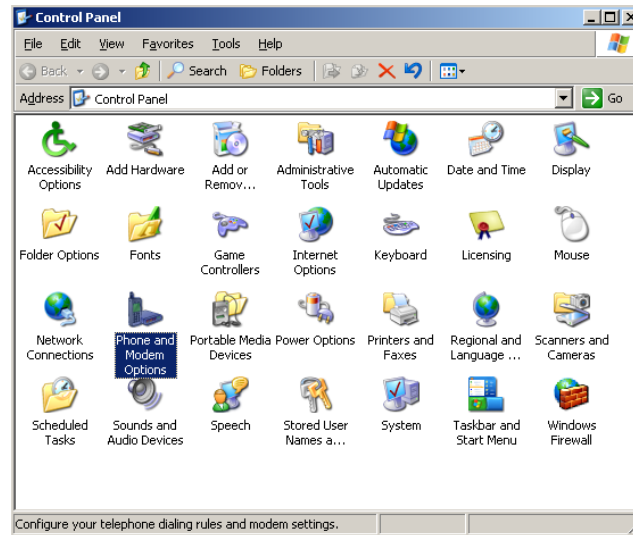
Appendix: TAPI configuration - Country and Area Code

Prerequisites Checklist

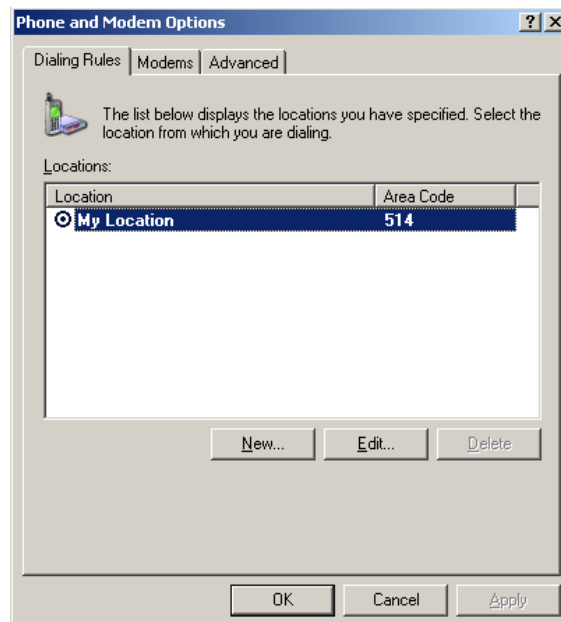
The country and area code Excendia will use to dial from.

Configuration Instructions

1. Open Phone and Modem Options in Control Panel.



2. Double-click on your location or enter a new location by clicking **New...**



3. In the New Location window, enter a location name, select the Country/region and enter an area code.

New Location

General | Area Code Rules | Calling Card

Location name: Montreal

Specify the location from which you will be dialing.

Country/region: Canada Area code: 514

Dialing rules

When dialing from this location, use the following rules:

To access an outside line for local calls, dial:

To access an outside line for long-distance calls, dial:

Use this carrier code to make long-distance calls:

Use this carrier code to make international calls:

☐ To disable call waiting, dial:

Dial using: ☒ Tone ☐ Pulse

OK Cancel Apply

If your location has a carrier code for international calls (such as France), enter it as follows:

Edit Location

General | Area Code Rules | Calling Card

Location name: My Location

Specify the location from which you will be dialing.

Country/region: France Area code: 1

Dialing rules

When dialing from this location, use the following rules:

To access an outside line for local calls, dial:

To access an outside line for long-distance calls, dial:

Use this carrier code to make long-distance calls:

Use this carrier code to make international calls: 00

☐ To disable call waiting, dial: 1

Dial using: ☒ Tone ☐ Pulse

OK Cancel Apply

4. Certain locations have dialing rules that need to be specified. Go under the Area Code Rules tab and press **New...** to enter the dial settings of your current location.

The 'Edit Location' dialog box has three tabs: 'General', 'Area Code Rules', and 'Calling Card'. The 'Area Code Rules' tab is active. It contains a text box explaining that an area code rule determines how phone numbers are dialed. Below this is a table with columns 'Area Code', 'Prefixes', and 'Rule'. The table is currently empty. Below the table are three buttons: 'New...', 'Edit...', and 'Delete'. At the bottom of the dialog are 'OK', 'Cancel', and 'Apply' buttons.

Edit Location

General | **Area Code Rules** | Calling Card

An area code rule determines how phone numbers are dialed from your current area code to other area codes and within your area code.

Area code rules:

Area Code	Prefixes	Rule
-----------	----------	------

New... Edit... Delete

Description
Select a rule in the list above to view its description, or click New to add a rule.

OK Cancel Apply

5. This next window shows what rules you can apply to your calls. For example, if you need to insert the area code or not. You can also specify if all prefixes are used within this area code.

The 'Edit Area Code Rule' dialog box contains instructions on how the rule applies. It has fields for 'Area code you are calling:' and 'Area code:' (with '514' entered). To the right, a 'Prefix' field shows a pattern 'X-XXX-XXX-XXXX'. Below these are 'Prefixes' and 'Rules' sections. The 'Prefixes' section has two radio buttons: 'Include all the prefixes within this area code' (selected) and 'Include only the prefixes in the list below:'. The 'Rules' section has a 'Dial' checkbox (unchecked) and an 'Include the area code' checkbox (checked). At the bottom are 'OK' and 'Cancel' buttons.

Edit Area Code Rule

This area code rule will only apply to calls made to the area code and prefix combination you specify below.

Area code you are calling: Area code Prefix
Area code: 514 X-XXX-XXX-XXXX

Prefixes
Specify the prefixes to be used for this area code rule.
☒ Include all the prefixes within this area code
☐ Include only the prefixes in the list below:
Prefixes to include:
Add... Delete

Rules
When dialing phone numbers that contain the prefixes above:
☐ Dial: 1
☒ Include the area code

OK Cancel

6. If you have another area code, click **New** select a new area code and specify the prefixes to be used for this area code.

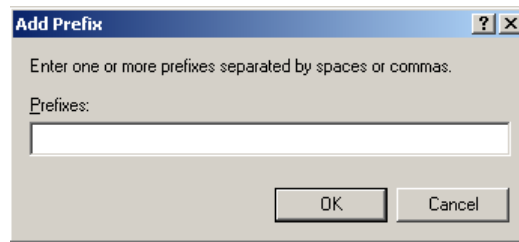
The 'Edit Location' dialog box has three tabs: 'General', 'Area Code Rules', and 'Calling Card'. The 'Area Code Rules' tab is active. It contains a text box explaining that an area code rule determines how phone numbers are dialed. Below this is a table titled 'Area code rules:' with columns 'Area Code', 'Prefixes', and 'Rule'. The table has two rows: one for area code '450' with 'Selected' prefixes and a rule to 'Dial area code', and another for area code '514' with 'All' prefixes and a rule to 'Dial area code'. Below the table are 'New...', 'Edit...', and 'Delete' buttons. A 'Description' box at the bottom states: 'Dial the area code before the number for calls within the 450 area code, containing the prefixes you specified.' At the very bottom are 'OK', 'Cancel', and 'Apply' buttons.

Area Code	Prefixes	Rule
450	Selected	Dial area code
514	All	Dial area code

7. If you have a list of prefixes to be used for this rule, enter them altogether by pressing the **Add...** button.

The 'Edit Area Code Rule' dialog box explains that the rule applies to calls to a specific area code and prefix combination. It has fields for 'Area code you are calling:' (with a value of '450') and a 'Prefix' field with a mask 'X.XXX.XXX.XXXX'. Below these is a 'Prefixes' section with two radio buttons: 'Include all the prefixes within this area code' (unselected) and 'Include only the prefixes in the list below:' (selected). Under the second option is a list box titled 'Prefixes to include:' containing '203', '205', '207', and '210', with 'Add...' and 'Delete' buttons. A 'Rules' section at the bottom asks 'When dialing phone numbers that contain the prefixes above:' and has two checkboxes: 'Dial' (unselected) and 'Include the area code' (selected). 'OK' and 'Cancel' buttons are at the bottom right.

Enter the list of prefixes separated by spaces in the Add Prefix box.

A screenshot of a Windows-style dialog box titled "Add Prefix". It contains a text input field with the label "Prefixes:" and a small icon of a question mark and a close button in the top right corner. Below the input field are two buttons: "OK" and "Cancel".

These prefixes and other tariff information are provided by an independent web site <http://www.localcallingguide.com/> or search for "local calling guides" using a web search engine.

As an example, the list of prefixes that do not require 1 before 450 when called from 514-Montreal (for TAPI configuration) is as follows:

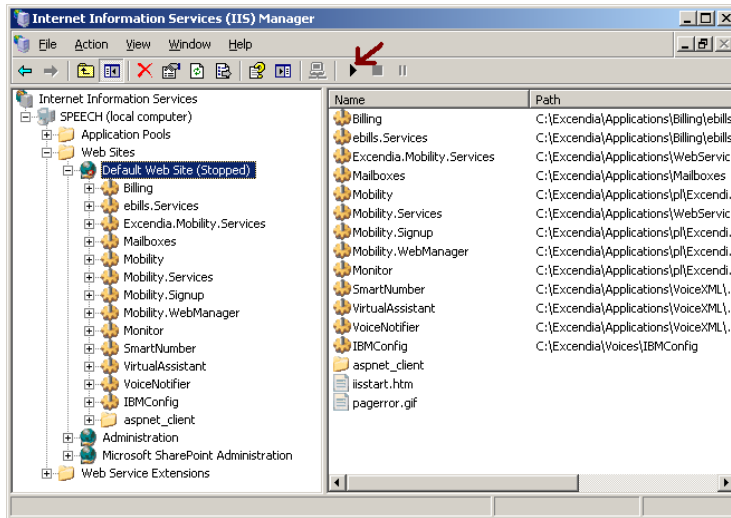
203 205 207 210 212 213 214 215 222 224 225 227 240 244 245 246 247 248 258 268 270 280 281 294
321 336 340 341 346 347 348 349 357 358 359 368 392 419 420 421 424 427 429 430 433 434 435 437
439 441 442 443 444 445 446 447 448 449 451 452 454 455 458 460 461 462 463 464 465 466 467 468
470 471 472 473 474 475 476 477 478 479 491 492 495 505 506 508 510 515 523 524 536 537 540 541 542
543 545 547 550 552 557 562 563 566 571 572 573 575 580 581 582 583 584 585 586 587 588 589 594 595
596 597 603 608 612 613 614 615 616 617 618 619 621 622 623 624 625 627 628 629 632 633 635 638 640
641 645 646 647 648 649 650 651 652 653 654 655 656 657 658 659 661 662 663 664 665 666 667 668
669 670 671 672 674 676 677 678 679 680 681 682 683 684 685 686 687 688 689 691 692 696 698 699
701 702 708 709 713 714 715 716 717 718 719 720 721 722 723 724 725 727 728 729 731 732 733 735 736
737 738 748 752 761 763 766 767 781 785 786 787 795 806 822 825 826 827 828 831 834 838 849 853
857 860 861 862 863 865 869 882 891 892 893 896 901 902 904 905 922 923 926 928 929 952 961 962
963 964 965 966 967 968 969 970 971 972 973 974 975 978 979 980 981 982 984 985 986 988 995 996

The TAPI configuration is now complete.

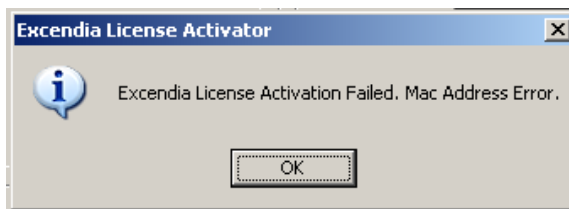
Troubleshooting

The browser cannot display the Web Manager site

- ☐ In the Internet Information Services (IIS), Start the default Web site if it's stopped

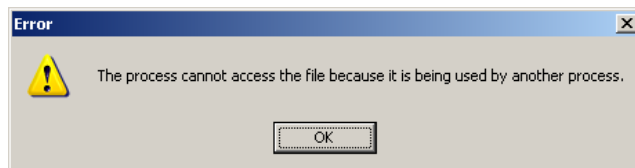


Excendia license activation failed



- ☐ Contact the system administrator

Cannot start the default web site



- ☐ Check if another process is using the port 80
- ☐ If IBM WebSphere is installed on the same server, go to Control Panel => Administrative Tools then click Services
- ☐ Stop the service IBM HTTP Server 1.3.28 and change the start-up type to manual
- ☐ Start the Default Web Site from Internet Information Services

