

ESNA OFFICELINX™

SMS Manager



SMS MANAGER

SMS Manager is a utility within the Emergency Broadcast and Absenteeism package available from Esna Technologies Inc. It is not included with the standard Officelinx installation. Contact your dealer for details on purchasing this additional package.

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SMS MANAGER

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ESNA OFFICELINX SMS MANAGER

Introduction

SMS Manager is a tool for creating or importing SMS phone numbers and email addresses into distribution lists from a standard delimited text file or the unified messaging system database. The user can create an unlimited number of distribution lists with mixed SMS phone and SMS email addresses. Standard emails and phones are also supported.

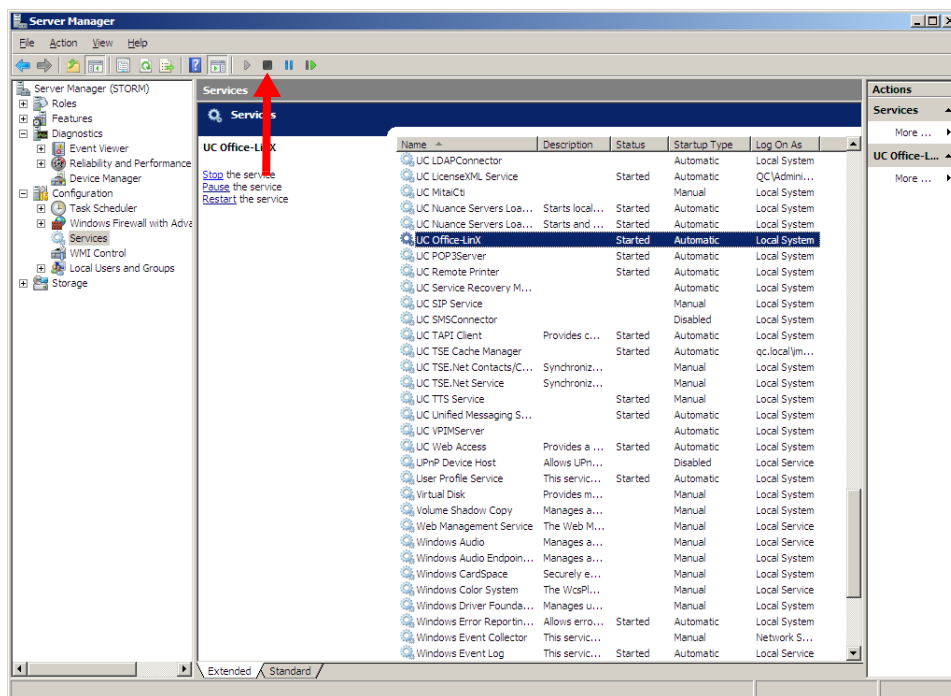
These lists can be used to send SMS messages through HTTP and SMTP gateways. HTTP gateways are preferred due to increased accessibility and reliability.

The current version of SMS Manager supports CSOFT integration using both http and secure http protocols.

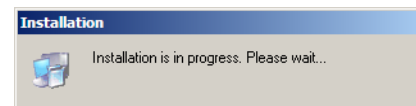
Installing SMS Manager

The SMS Manger is part of the Emergency Broadcast and Absenteeism package available from Esnatech. It is not included with the standard Office-LinX installation package and must be purchased separately. Contact your dealer for details.

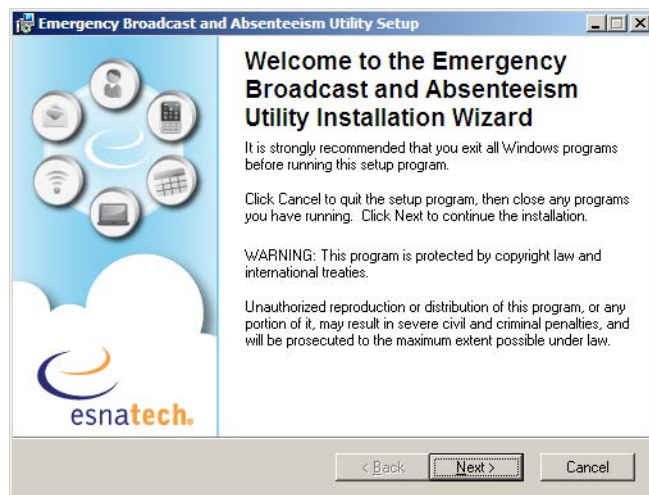
Warning: You must stop the UC Office-LinX service on the computer before proceeding with the installation. Open the Server Manager (go to **Start**, right-click on **Computer**, and click **Manage**). Select the **UC Office-LinX** service and click **Stop the service**.



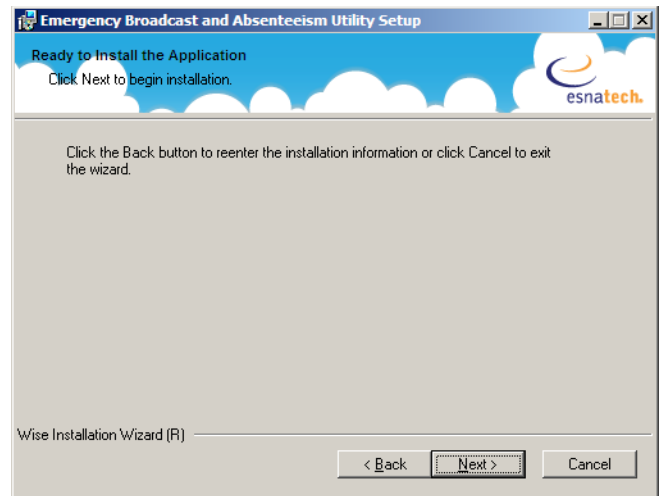
1. Once you have acquired the SMS Manager package and saved it onto a computer, run the program.



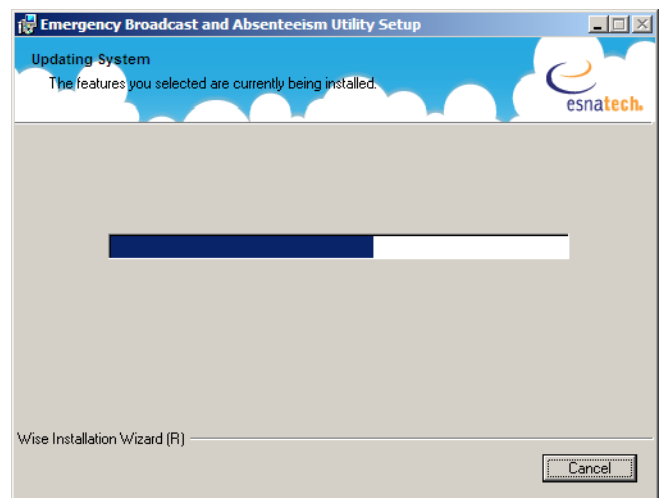
2. The installation wizard will appear.
Click **Next** to begin installing the program.



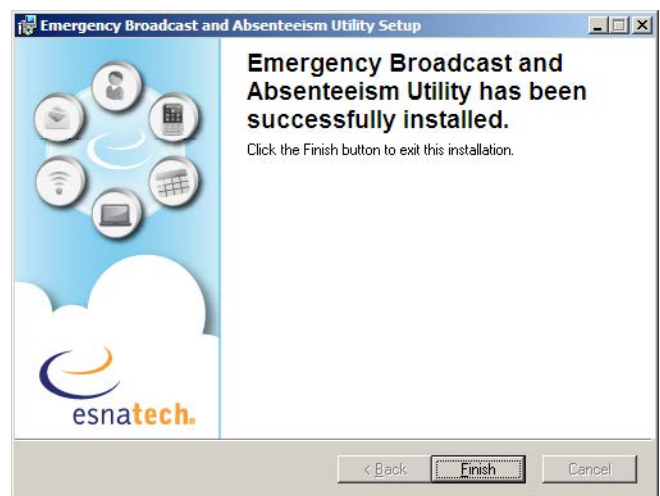
3. You will be prompted to continue the installation.
Click **Next**.



4. The SMS Manager package will be installed. This process may take a while.



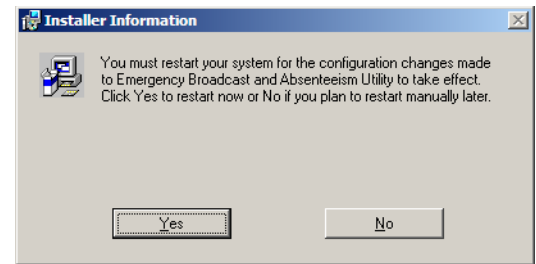
5. Once the installation is complete, click **Finish**.



- You will need to restart the computer before the program can be used.

If you wish to restart the computer at a later time, click **No**.

Otherwise, click **Yes** to restart the computer.



Starting the SMS Manager Utility

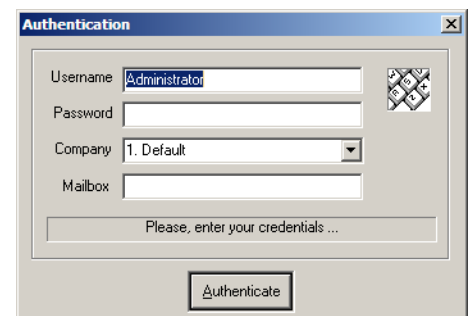
Once installed, launch the SMS Manager utility from the desktop icon.

You can also go to **Start > All Programs > Office-LinX > SMS Manager**.

Authentication

Authentication is required to use SMS Manager. Without it, any user could use any mailbox to manage distribution lists.

Use of the administrator account is mandatory, restricting access to settings and information to the system administrator only.



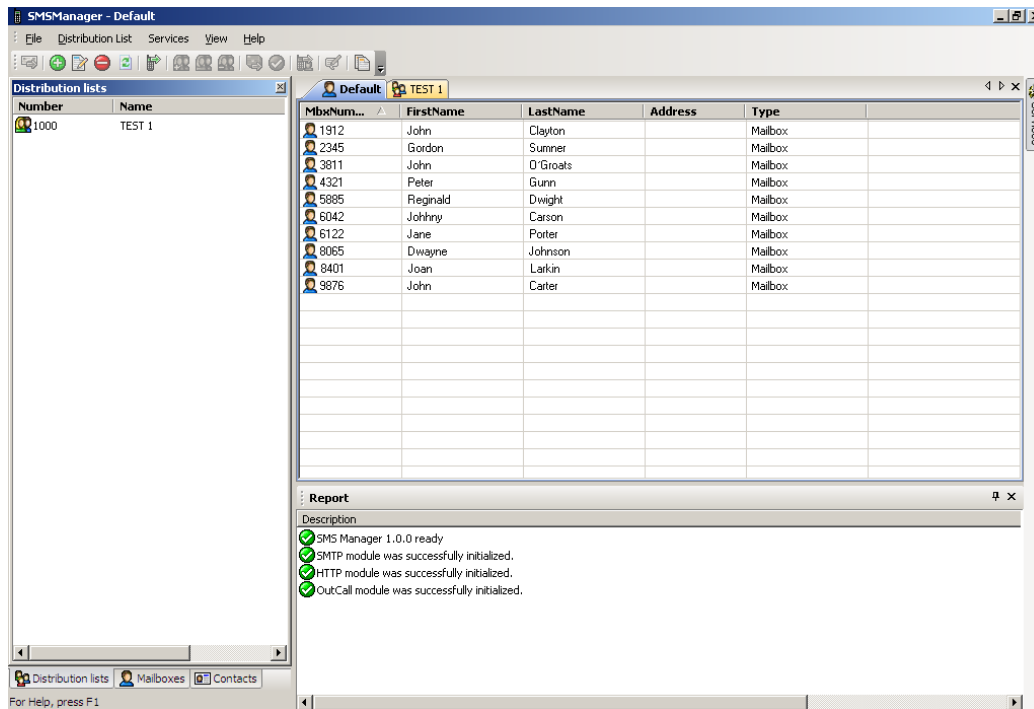
Interface overview

SMS Manager consists of one main window and 5 object panes.

In the Main Windows, the 3 tabs on the left-hand side display distribution lists, mailboxes and contacts. The pane on the right-hand side displays all SMS providers and references to their SMTP gateway or web site. The bottom pane is a report window.

Main window

The Main window contains the dropdown menus, the toolbar, several dockable panes and status bars.

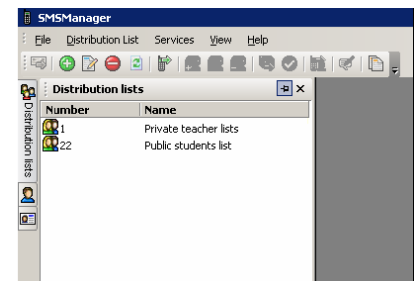


Object tabs



There are 3 tabs at the bottom left-hand side of the main window. The Services tab is in the upper right corner.

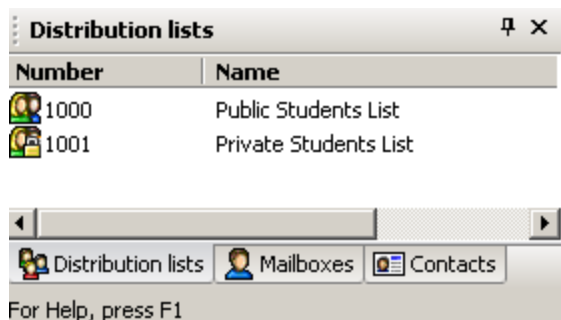
Note: All panes can be moved, docked or hidden.



Distribution lists

This tab shows all **Distribution lists**. There are two types, private (available only to the current user) and public (available to all users).

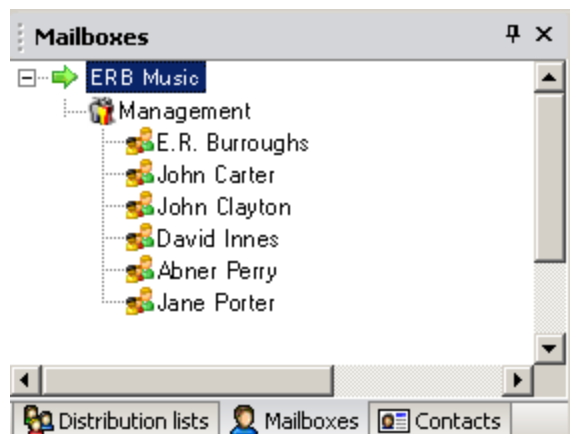
Double-clicking on a Distribution List will open all of the items in that list.



Mailboxes

The **Mailbox** tab shows all Organizational Units (OU) for the selected company.

You can double-click on any OU and it will open all mailboxes associated with this OU.



Contacts

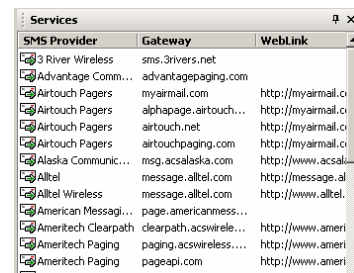
The **Contact pane** lists all private and public contacts.

Clicking on either contact type will open all contacts associated with that type.



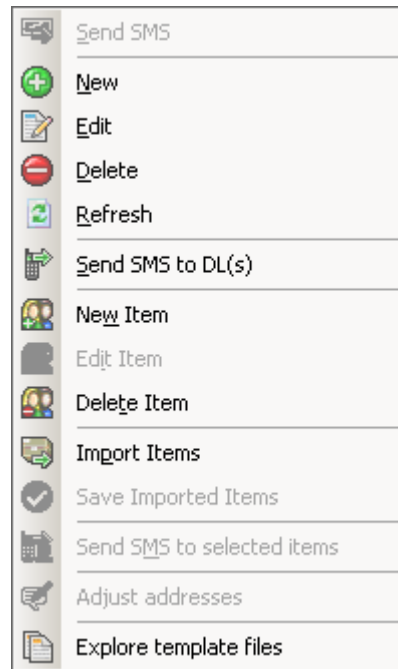
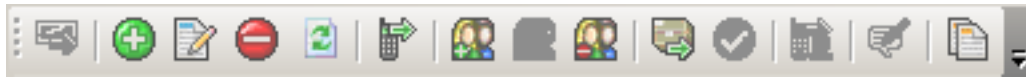
Services

The **Services** tab lists all SMS providers defined in the configuration file. See **Services on page 17** for more information.



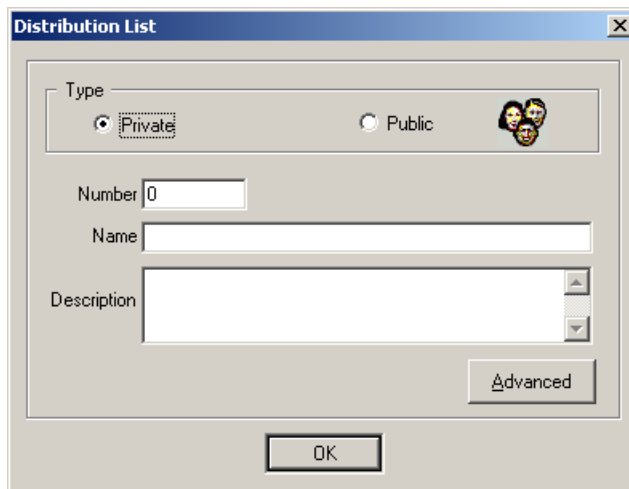
Managing Distribution lists

Distribution List Toolbar and Menu



Adding a Distribution List

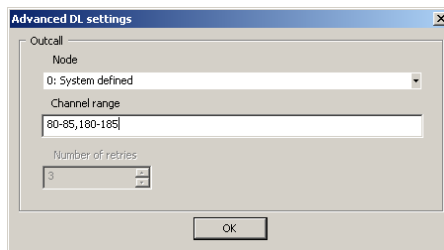
1. To create a new Distribution List, click the **New** icon on the toolbar or from the **Distribution List** menu.



2. Choose the type of list it is to be (**Public** or **Private**).
3. Enter values for the **Number** and **Name** text fields. The Number cannot be 0.

Warning: The **Number** and **Name** fields are arbitrary but must be absolutely unique. No number can be repeated within any of the Private and Public lists.

4. The **Description** field is to provide a meaningful definition of the purpose of the list.
5. Click **Advanced**.



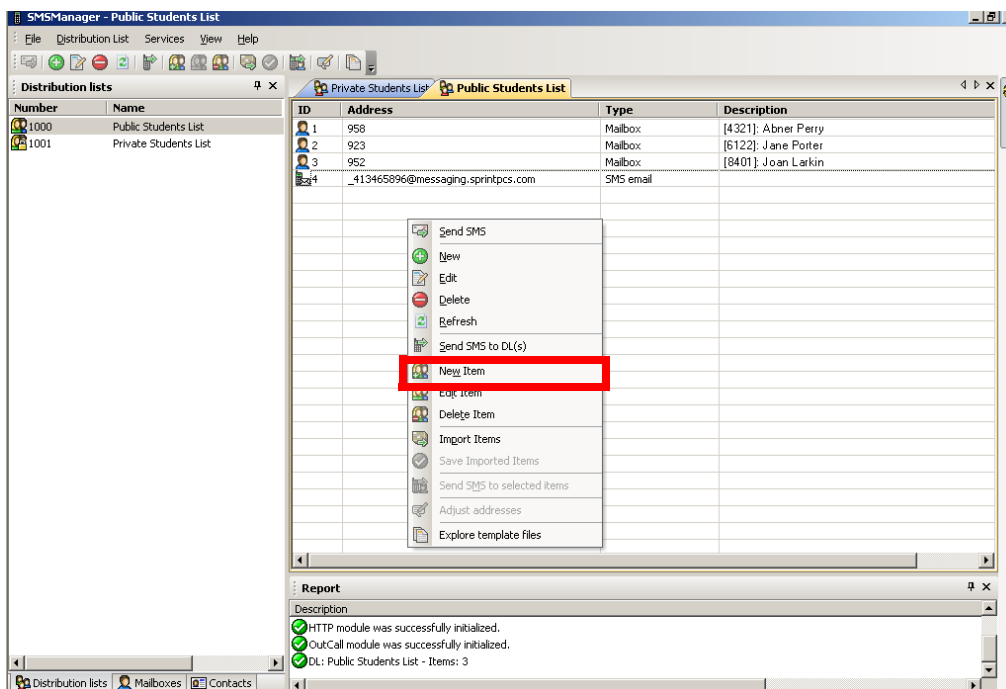
6. Select the correct **Node** from the dropdown list. If there are multiple outcalling nodes, then select **0: System Defined**.
7. Enter the channel range for the list. Numbers separated by a dash include all numbers in between the start and end value. Use a comma to add additional channels and ranges to the list.
8. Click **OK** when finished.
9. Click **OK** to save the new list.

After the Distribution List has been saved, it will appear in the Distribution List pane.

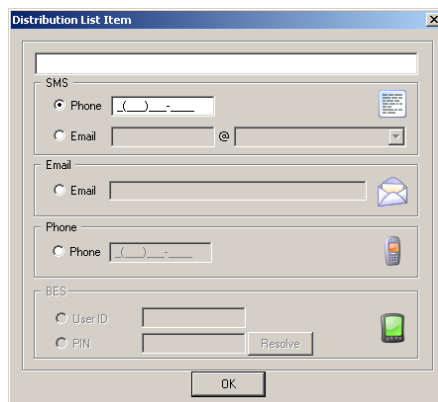
Adding Distribution List items

For any Distribution List, you can manually enter new members, or import them from a text file. Double-click on the list and it will open a new container. This container will display already saved items, if any.

1. To add items manually, click on the **New Item** button.



2. The Distribution List Item dialogue box appears. To enter the necessary items, click the appropriate radio button and enter the contact data.



- **SMS Phone items will be sent through HTTP gateways (text messaging).**
- **SMS Email & Email will be sent through SMTP gateways (email).**
- **Phone will be sent to a recipient's phone.**
- **BES User ID & PIN are used when sending messages to Blackberry users. Enter either the User ID or PIN number for the recipient.**

Note: Only one type of contact can be selected per entry.

3. Click **OK** when finished.

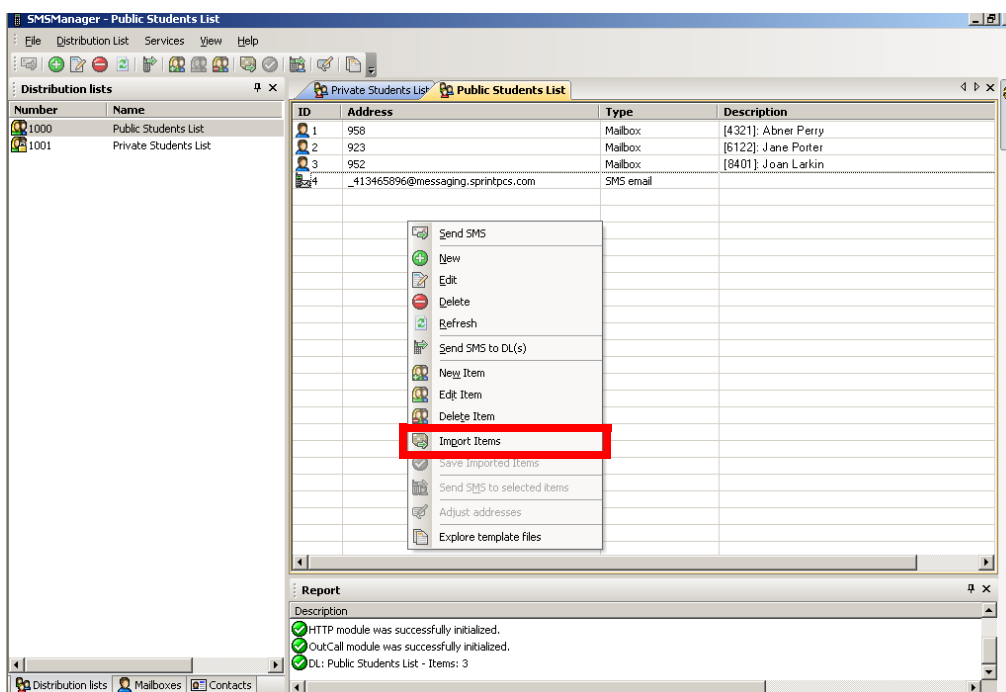
- Repeat steps step 1 through step 3 to add as many contacts to the list as required.

Note: If you do not save the changes, you will be prompted to save them when the window is closed.

Importing Items to a Distribution List

SMS Manager can import items to a Distribution List from a delimited text file.

- Select **Import Items** from the toolbar, or from the Distribution List menu.



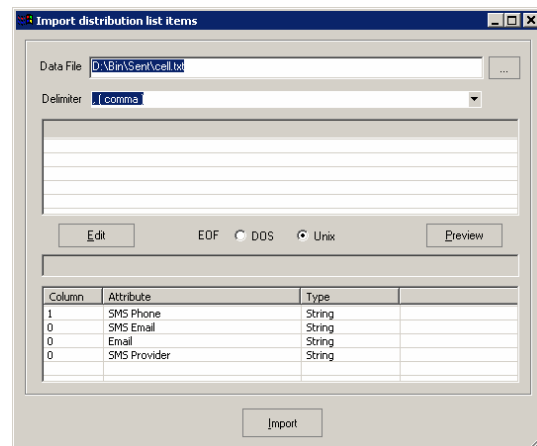
- The following screen appears.

Data File: Specify the file to import from, or click the ellipsis ... to find it.

Delimiter: Select the delimiter used in the import file to separate data items on a row (e.g. semicolon, comma).

- Click on the **Preview** button to see the first few lines from your imported file.

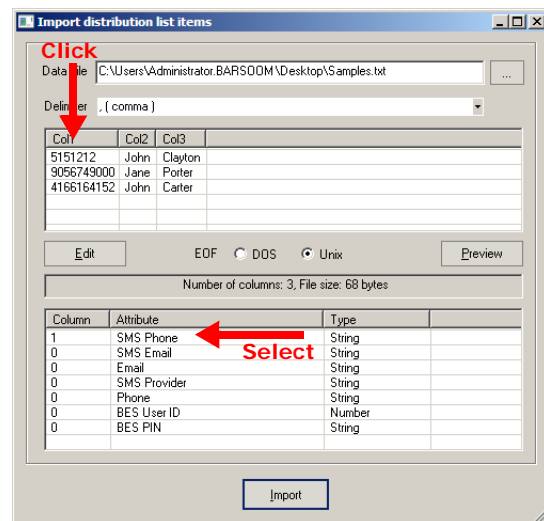
Note: The **Edit** button will open the data file in a text editor allowing you to edit the file directly.



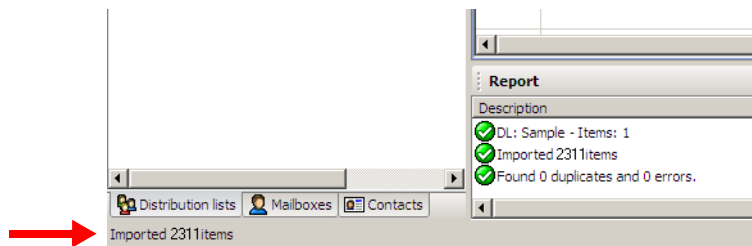
- You must associate the columns in the data file with the corresponding attributes.

In the bottom half of the window select the attribute you want to import, and then click on the column in the preview window (top half) which represents this attribute.

Repeat for all attributes that are to be imported.



- Once all parameters have been configured, click on the **Import** button. The status bar in the lower left-hand corner of the Main window will indicate progress and how many items have been imported.



Note: Imported items are not immediately saved to the database. You can still modify them before they are permanently stored. This operation might be time-consuming if a large number of items is processed. Because all items are submitted in one parcel, no progress is shown.

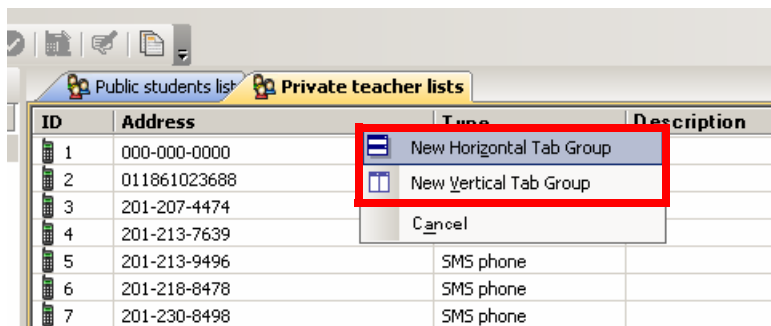
Note: The Report window provides more detailed information about import progress and the discovery of duplicates. Duplicates must be removed from the list before they are stored in the database.

- Once the import has completed and any editing has been done, go to **File > Save** to save the changes to the database.

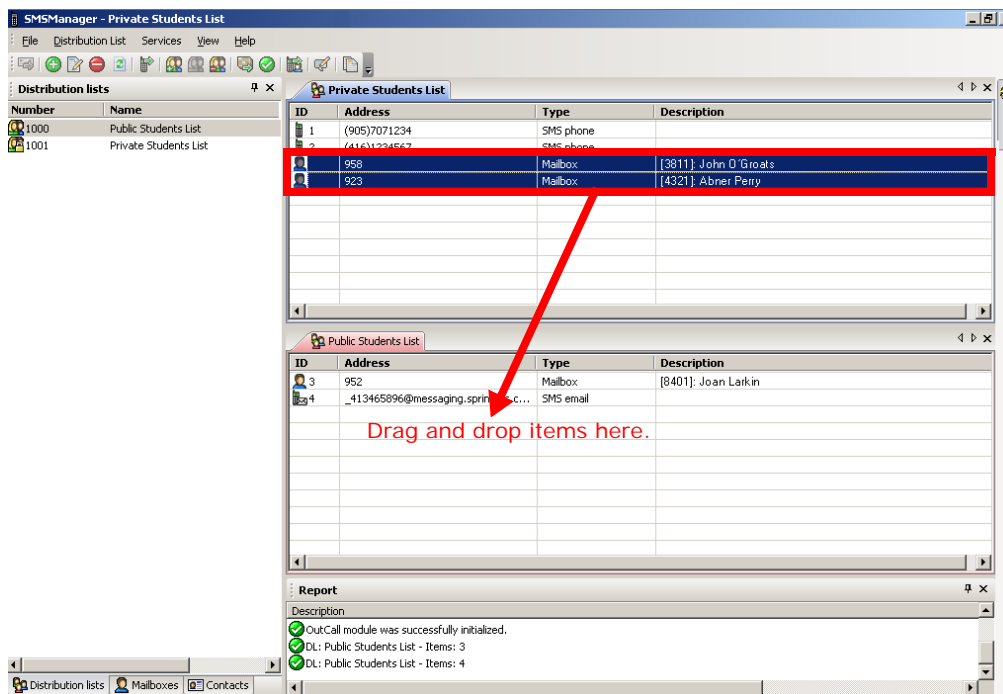
Updating the Distribution List and Distribution List items

Only a Distribution List name can be changed in this version of SMS Manager. Other abilities may be added in future releases.

You can easily move and copy items from one distribution list to another. Drag and drop is supported as well. Click on the Distribution List container tab and drag a cursor down, or right-click on it to call up the Tab group menu. You can create either horizontal or vertical tab groups.



You can select a group of items and move or copy them to a different Distribution List container.



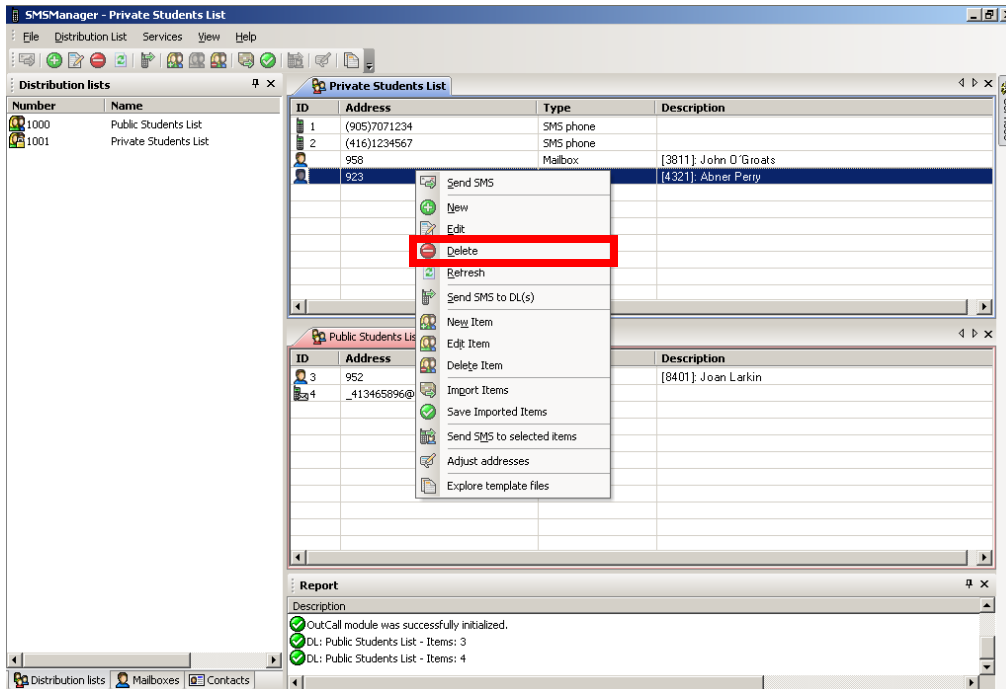
Distribution List items may only be added or deleted.

Note: All updates are done in memory only. The changes must be saved before they become permanent. If you try to close a modified container without first saving it, you will be prompted to **Save** or **Discard** all changes.

To save the changes, click **File > Save**.

Deleting a Distribution List and Distribution List items

You can select and delete multiple Distribution Lists or Distribution List items. Deletion is immediate for Distribution Lists, but Distribution List items require a **File > Save** action.

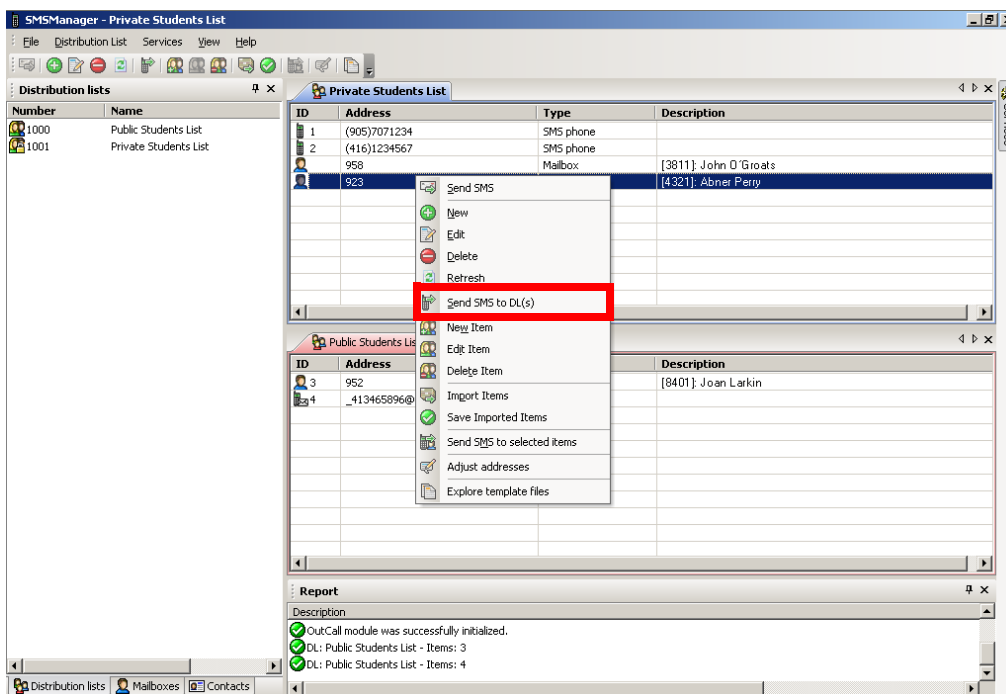


Sending SMS

You can send SMS messages to one or more Distribution Lists, or to individual Distribution List members.

Note: In an HA environment, SMS messaging only supports email. Phones are not supported using this tool.

1. Click on a Distribution List, multiple Distribution Lists (shift + click), or Distribution List members and select **Send SMS to DL(s)**.

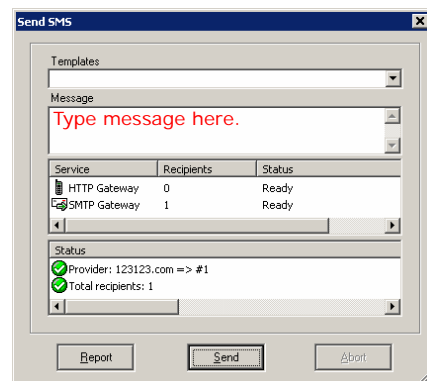


2. The SMS Manager prepares both the HTTP and SMTP engines for sending. Type a message in the space provided, or use a template created in any text editor (i.e. Notepad). Templates are stored in the Templates folder under the SMS folder.

Most providers have a limit of 160 characters per message. With longer messages, some providers split the message into a smaller messages, they may truncate the message, or reject it entirely. This applies primarily to SMTP gateways. Check with your provider for details.

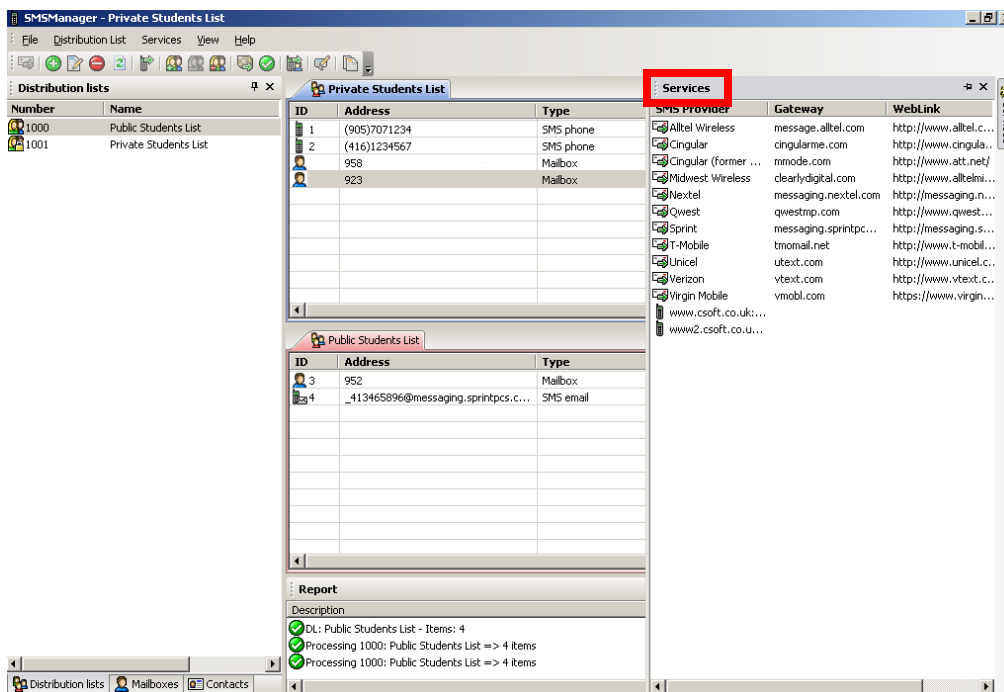
The message pane is highlighted below:

- **Report:** Display current progress and activity in the Status pane. This action will also create a brief report of SMTP recipients and delivery results. The Report button may also be used to generate a snapshot of started and completed operations.
- **Send:** Deliver the message.
- **Abort:** Cancel the message, although this may take some time.



Services

Services may be used to bookmark a provider's web site, or to add new providers when you want to import Distribution List items as SMS email.



All SMTP services are stored in the CFG file located in the UC installation folder and the SMS subfolder. SMTP services may be easily modified in any text editor. It is critical to strictly follow the format of this file.

