



# XARIOS

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## TECHNOLOGIES

Migrating from  
Xarios to Mitel Phone Manager

Version 5.0

## Overview

This document outlines the differences between the Mitel branded release 5.0 of Phone Manager and the Xarios branded 3.0 release. There are many new features in the solution in release 5, however, there are also some features that work differently compared to release 3.0 or are not present in release 5. It is important to review this document to make sure that any customer is aware of the differences in the products before upgrading.

### Communication Service 5.0

- Support for voicemail notification by hunt group membership (UCD & ACD)
- Enhanced Alarm support with visual alerts on Team Leader clients of alarms
- Improved support for Active Directory including import by Organisational Units
- Centralised configuration of Phone Manager settings including license assignment

### Phone Manager 5.0

- New UI with context sensitive toaster style call control window
- DSS presence view displays centrally configured departments and teams
- Call banner profiles for differentiating between different types of calls
- Softphone option for using Phone Manager as an endpoint
- Windows integrated login with minimal user side configuration
- Improved Microsoft Outlook support with the ability to create Meet-Me appointments

## New licensing

Release 5 sees a change in the way the product is licensed. Standard licenses are no longer available to purchase and the Outlook, Professional & Team Leader have all had pricing updates. In addition, the Advanced Plugin license has been removed to simplify the quoting process - all 3<sup>rd</sup> party product integrations are now available in the base Professional license (apart from EMIS which is a separately charged plugin).

## TAPI Licensing Changes

In release 3 of Phone Manager TAPI was available to users purchasing the Outlook license or higher. In release 5 this has now been changed to the Professional license due to the inclusion of a plugin that allows users to dial from Outlook without using TAPI. Customers upgrading from release 3 to release 5 will keep the TAPI licenses they purchased, this change will only affect new release 5 customers purchasing Outlook licenses.

## Migrating

Anyone on a Xarios branded product prior to R4 will need to follow an update process. Please contact Xarios for more information on upgrading these sites.

Release 5 will not support release 3 Phone Manager Clients. This means that Phone Manager installations must be done in conjunction with the server install.

Please take note of the new hardware requirements for upgrading both Phone Manager and Communication Service and be aware of the changes / removed features documented below.

## New Hardware Requirements

If your current PCs do not match the minimum specification, you will not be able to install release 5:

	Communication Service (Small)	Phone Manager
<b>Operating System</b>	Windows 7 Pro/Enterprise/Ultimate 64-bit Windows 8.1 Pro 64-bit Windows 10 Pro/Enterprise 64-bit Windows 2008 R2 64-bit Windows 2012 R2 64-bit Windows 2016 64-bit	Windows 7 Pro/Enterprise/Ultimate 32-bit/64-bit Windows 8.1 Pro 32-bit/64-bit Windows 10 Pro/Enterprise 32-bit/64-bit Windows 2008 R2 32-bit/64-bit Windows 2012 R2 64-bit Windows 2016 64-bit
<b>Processor</b>	1 x Intel dual core Core i3 @ 3.3 GHz	Intel Core 2 Duo @ 1.8GHz or faster processor (or equivalent)
<b>Memory</b>	Minimum: 4GB RAM	Minimum: 1GB RAM, Recommended: 2GB+
<b>Network</b>	IPv4, 100 Mb/ 1Gb LAN, Static MAC Address	IPv4, 100Mb / 1Gb LAN
<b>Hard Disk</b>	Minimum: 100GB free space + 1GB for each million call records	Minimum: 20GB free space
<b>Video</b>		Minimum: DirectX v9 compatibly video cards with 120MB RAM Recommended: DirectX v9 compatibly video cards with 1024MB RAM
<b>Software Requirements</b>	.NET Framework 3.5 SP1 & 4.5.2 Windows Installer 4.5 Windows PowerShell 1.0	.NET Framework 4.5.2 Windows Installer 4.5

**Note:** There are different minimum requirements for Communication Service on Medium and Large sized systems. Please review the technical manual for more information.

**Note:** Microsoft Windows XP, Vista and 2003 Server are no longer supported (Installing on a domain controller is not supported). For details on terminal environments and virtualisation please reference the latest technical manuals. 32-bit environments are no longer supported by the Communication Service.

## Changed Features

The current Mitel branded release is 5.0. The following features have been changed from previous Xarios releases. Customers upgrading need to be made aware of these changes.

### Multi-Grouped DSS View

In previous releases users could configure their own DSS grouping to customise their view of users on the system. This has now been replaced with a centralised departmental and team grouping. Users of Phone Manager now have a single 'Favourites' group that they can customise on the client side.

### DDI Name Mapping

The feature where by the DNIS field in OAI could be overwritten with records imported into Communication Service have been removed. This was used by a subset of clients to identify the source of calls to end users when the quantity of DDIs being used exceeded the limits on the

MiVoice Office 250. This feature has now been superseded by the new Call Banner profiles feature which allows users to configure centrally what data is displayed on the Phone Manager toaster.

### Call Banner Profiles

Call Banner Profiles is a new feature in Phone Manager. This centralised method for controlling what a user sees during a call replaces the Xarios Phone Manager pop out banner and the features to add additional data and change colour accordingly. Call Banner Profiles have much more flexibility than the old method but lack the ability to copy certain fields to the clipboard, auto hide and the ability to add a custom button to run macros.

## Temporarily Removed Features

The following features have been temporarily removed from the product due to changes in its design. These features will be re-introduced at the earliest possible time in way that fits in with the new centralised configuration structure.

### CPN Mapping

The feature to modify the CLI of outbound calls based on the number being dialled has been removed from the solution. This is due to a redesign of the feature being required. This will be re-introduced in a future release of Communication Service.

### Call History

The call history page on Phone Manager used to provide two features that are no currently in the solution; Exporting and Note taking. These features are due to be re-introduced in future versions of the solution.

### Chat

In release 5.0 the Chat feature provides no ability for multi-party communication. This functionality is due to be re-introduced in future versions of the solution.

### Ringtones

The ability to play wav files on internal and external ringing calls has been removed from Phone Manager. This was due to the use of a 3<sup>rd</sup> party component that could not be moved into release 5.0. This will be re-introduced in a future release of Phone Manager.

### Custom Images on Contact Icons

The ability to add personal images to contacts on the DSS has been removed from the solution. This has been replaced by a centralised implementation where users can set their own personal image that is then seen by all other users.

## Permanently Removed Features

### Web Call-back

The web call-back feature allowed customers browsing a website to be called by a Phone Manager user. This feature has been removed but is still supported by Xarios in release 3.

### SMS Support

Support for email and fixed cellular terminal SMS messaging has been removed from both Application Server and Phone Manager but is still supported by Xarios in release 3.

### ActiveX Control

Support for the Phone Manager ActiveX control has been removed. Customers using the ActiveX control can opt to leave the still supported release 3 in place purely for the ActiveX or can migrate their code to use the Phone Manager .NET API.

### Plugins

The following plugins have been permanently removed from the solution:

*Microsoft Access, Sage CRM MME, Sage 200 CRM, Soft Talk Office Talk, VTiger, Serengeti, Logical Office*

In addition, some of the supported versions of products have changed. Please check the Phone Manager CRM Data Sheet for a list of supported versions.

## Standard Licenses

Although Standard Licenses are no longer available to purchase, customers who are migrating a fully licensed Xarios branded Application Server will be able to use their existing Phone Manager Standard Licenses in release 5.x. There are some differences between the Standard licenses in R5 to previous versions which need to be taken into account before migrating.

### Call Banner Profiles

Call Banner Profiles are not available for Phone Manager clients using a Standard license so there is no way for users to control the fields visible on the banner with this license. An upgrade to an Outlook license is required to benefit from these features.

### Hotkeys in Standard Phone Manager

Hotkeys are not supported in the legacy standard user on sites that migrate from v3 to v4.1 and higher. Therefore, the highlight and dial function will only work if you double click the banner bar icon docked to the side of the PC screen.

