

CMG Quick Installation Guide

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Introduction

Mitel CMG is a collaboration and presence management suite enabling business users to manage their day-to-day communication.

The **CMG Package** includes the CMG Web component, enabling users to manage their activities. With the CMG Web site, users can work with “smart-search” directory services, use click-to-dial, set activity timeline and manage call-routing preferences based on the calendar/activities.

The integration with the BluStar Server enables users to see in real-time their colleagues’ rich presence information, including BluStar user presence status, calendar activity and line state from all available sources provided by the BluStar Server.

This document describes how to install **CMG** on a single server using the Mitel Installer wizard, and how to do a basic configuration of the system.

CMG Package Overview

The CMG wizard installation covers the following:

- **Enterprise License Manager**- used by CMG to manage the licenses.
- **Microsoft .NET Framework 4.7.2** – necessary to run the CMG Web applications.
- **CMG Server** – the main software package including CMG Server, CMG Web, Calendar Connection as well as administrative tools and services.

For more detailed information about the CMG components, refer to document CMG System Overview [2].

Mitel Installer Wizard

To start Mitel Installer, run the `Install.exe` file. The main window is displayed:



For more detailed information about Mitel Installer, refer to document Mitel Installer Overview [1].

The following items are relevant for this document:

- **Install** – this is the wizard to use for installing the CMG software. The installation is further described in chapter 3.

- **Configure variables** – to configure the variables related to the wizard installation. These variables will help automating the installation process, and variables used on many installations need only be stated once.
In the **Configure Variables** window, you can click **Reset** to restore the variables to the default values. Click **OK** when all values have been configured.
NOTE: The variables in the Configure Variables window can also be changed from the Install CMG Server wizard, see section 0.
- **View installed versions** - used to list the versions of already installed software. In the **View installed versions** window, click **Save** to save the version list in HTML format. Click **OK** when finished.

Requirements Overview

There are a number of requirements to consider before installing CMG. These are further described in document CMG Installation Preparation Guide [3].

For software compatibility and hardware requirements, see CMG Web Compatibility Matrix [7].

Install from Wizard

This section describes the steps involved to install CMG from the installation wizard. For more detailed information on the installation wizard, refer to document Mitel Installer Overview [1].

To install CMG, click the **Install** link in the Mitel Installer main window. The **Install** wizard is displayed. The Install wizard includes these links:

- **Install ELM Server/Client**
- **Install Microsoft .NET Framework 4.7.2**
- **Install CMG Server**

Install ELM Server/Client

This section describes how to install ELM Server from the wizard.

NOTE:

1. ELM Server must not be installed on more than one server on the network.
2. If BluStar License Manager and ELM Server are installed on separate servers, the ELM Client must be installed on the same server as BluStar License Manager.

To install ELM Server/Client, do the following:

1. Click the **Install** link in the Mitel Installer main window.
2. Click on the **Install ELM Server/Client** link.
3. In the **Install ELM Server/Client** window, review the list of components to install for the ELM Server. Components that are already installed are displayed with a green check mark. Click **Next** to start the installation.
4. In the **Welcome** dialog, click **Next**.
5. In the **Feature Selection** dialog, select either of the following:
 - a. **Enterprise License Manager Client** - if ELM Server has already been installed. If you select this choice, you will be asked to enter the server address and port of the installed ELM Server.
 - b. **Enterprise License Manager Server** - to install ELM Server including ELM Client.
 - c. Click **Next** to continue.
6. In the **Choose Destination Location** dialog, change the **Destination Folder** or keep the default folder. Click **Next** to continue.
7. In the **License Server Options** dialog, keep the default port number, 2580. Click **Next** to continue.
8. The **Start Copying Files** window includes a summary of the settings made in the previous steps. To change a setting click **Back**, to continue click **Next** and the installation will start.
9. In the **InstallShield Wizard Complete** dialog, click **Finish**.

NOTE:

- To run ELM on Windows Server, enable IIS 6 compatibility, ASP and ASP.NET on the web server. The instructions for these activities are described in the document CMG Installation Preparation Guide [3].

- Note! If ELM is installed on Windows Server 2012/R2, ensure that the following boxes are checked in Windows **Server Manager** -> **Manage** -> **Add Roles and Features** -> **Web Server** -> **Management Tools**:



10. The license file should now be installed, see section 3.5.1 for information on how to do this. In the **Working...** window click **Continue** and in the next window click **Finish**.

Install Microsoft .NET Framework 4.7.2

This section describes how to install Microsoft .NET Framework 4.7.2 from the wizard. To install, do the following:

1. Click the **Install** link in the Mitel Installer main window.
2. Click on the **Install Microsoft .NET Framework 4.7.2** link.
3. In the **Install Microsoft .NET Framework 4.7.2** window, review the list of components to install. Components that are already installed are displayed with a green check mark. Click **Next** to start the installation.
4. When the installation is finished, the server will be automatically restarted.

NOTE: If running on Windows Server 2012 or 2012 R2, .NET Framework 4.5 is already included and this step can be skipped.

Install CMG Server

Do the following:

1. Click the **Install** link in the Mitel Installer main window.
2. Click on the **Install CMG Server** link.
3. In the **Install CMG Server** window, review the list of components to install for CMG. Components that are already installed are displayed with a green check mark. Click **Next** to start the installation.
4. In the **Configure variables** window, do the following:
 - a. Enter a password for the 'Nice' Windows account in the **Enter Windows account password** field.
 - b. Select a language from the **Set CMG database language** list.
 - c. Select a call manager from the **Set Call Manager type** list.
 - d. Keep the recommended **Drive Letter** (C:\) for the CMG Server installation, or enter a new drive letter.
 - e. Keep the admin account in the **SQL User (Calendar Connection)** field or enter a new.

- f. Enter the password for the database user in the **SQL Password (Calendar Connection)** field.
- g. Keep the recommended **Calendar Connection Path** (E:\Calendar Connection) for the Calendar Connection installation, or enter a new path.
- h. Click **Apply**.

NOTE: These configuration settings can also be made from the Configure variables link in the Mitel Installer main window, described in section 1.2.

- 5. The **Working ...** window shows the installation status for all components. The component that is currently installed is shown with a blue arrow and the installed components are shown with a green check mark. Go through all installation steps, read the information and then click **Continue**. This will start the actual installation process.

- 6. After Calendar Connection has been installed, the **Calendar Connection Wizard** is displayed.

NOTE: This configuration shall NOT be performed for future upgrades of Calendar Connection. This is only for new installations.

For a new installation of Calendar Connection, perform the following configuration steps:

- a. In the **Calendar Connection Wizard**, there are the following choices:
 - If Calendar Connection shall be configured for another e-mail system than Microsoft Exchange, click **Skip configuration** and click **Next**. This configuration has to be performed manually and is described in document Calendar Connection Configuration Guide [6].
 - If Calendar Connection will be configured for Microsoft Exchange, click **Setup Calendar Connection for Microsoft Exchange** and click **Next**.
- b. If **Setup Calendar Connection for Microsoft Exchange** was selected, the Configuration dialog is displayed. In this dialog, configure the following:
 - Database Access
 - Username** - enter the database user which was defined during installation.
 - Password** - enter the password for the database user.
 - NOTE:** This user should have rights to create the database "TsConfigCMGx" (x is the number of the instance, beginning with 1). For more information, see chapter "SQL Database User" in Calendar Connection Configuration Guide [6]. Characters like '<', '>', '"', ... are not supported in the password string.
 - Microsoft Exchange server
 - Server** - enter the Exchange server name.
 - Mail Domain** - enter the e-mail domain for the Exchange server.
 - Access Protocol** - select the protocol to use for accessing the server.
 - Microsoft Exchange login parameters
 - Username** - enter the Exchange user.
 - Password** - enter the password for the Exchange user.
 - Domain** - enter the Exchange server domain.
 - Additional parameters
 - Calendar view (days)** - in the **(Back)** list, select for how many days backwards to fetch Calendar data and in the **(Future)** list, select the number of days ahead.
- c. Click **Apply** when finished.

- 7. In the next window, click **Finish**.

8. In the last window, click the link **Click here to restart...**

NOTE: The server restart is especially important if CMG Server is installed for Cisco Call Manager, since two embedded kits (that are part of the PBX integration) will automatically be installed (LSSClient and LSSCOMClient) and might request a restart of the server.

After the installation, some additional steps must be performed. This is described in the following sections, starting with an overview of the different configuration tools.

Configuration Tools

CMG Configuration Manager (CMG CM)

Configuration Manager is a web-based tool used by system administrators to configure and manage the CMG system.

Configuration Manager can be accessed with any browser at the address: `http://<server-name>/CMGCM` or from your server where the product is installed <http://localhost/CMGCM>.

The starting point for working with Configuration Manager is the sidebar. The sidebar consists of headings with subheadings under which you can perform various configurations. To go to different pages you click the required heading.

For more information about how to use Configuration Manager, see the online help. The online help is opened by clicking **Help** in the sidebar.

CMG Directory Manager (CMG DM)

Directory Manager is a web-based tool including a suite of functionality for management of user information in the organization.

Directory Manager can be accessed with any browser at the address: `http://<servername>/CMGDM` or from your server where the product is installed: <http://localhost/CMGDM>.

The starting point for working with Directory Manager is the sidebar. The sidebar consists of headings with subheadings under which you can perform various configurations. To go to different pages you click the required heading.

For more information about how to use Directory Manager, see the online help. The online help is opened by expanding **Help** in the sidebar.

Microsoft IIS Manager

IIS Manager is used to configure web applications and is opened from **Administrative Tools** in the **Windows Control Panel** or from the **Windows Start** menu/screen.

Mitel Spman and CMG Processes

Spman is a tool used to handle CMG processes.

To start Spman, open the **Windows Start** menu/screen and search for **Spman**.

After Installation

When CMG Server has been installed and restarted, the activities described in the below sections should be performed.

Install License File in ELM Server

When a product is ordered, a voucher is generated in the License & Services (SLS) application and as soon as the voucher is registered (activated), a license file is created and delivered by e-mail. For further information, refer to CMG Installation Preparation Guide [3].

The new license file is installed in Enterprise License Manager (ELM), which controls the licenses for CMG Web. To install the license file, follow the steps in Enterprise License Manager Technical Guide [8].

Verify the Installation of CMG Server

To verify the CMG Server installation, do the following:

- Check that the service Nice Server (01) is started.
- Check that **Spman** can be started. Select **Aastra – Spman** from the **Windows** menu.

Verify the Installation of Configuration Manager

To verify the Configuration Manager installation, start Internet Explorer, type `http://<server-name>/CMGCM` in the address bar and login.

Verify the Installation of Directory Manager

To verify the Directory Manager installation, do the following:

- Make sure there is a license installed in ELM.
- Start Internet Explorer, type `http://<servername>/CMGDM` in the address bar and login.
- Enter a few test records into the CMG database using Directory Manager to check that the application works.

Verify the Installation of CMG Web

CMG Web is configured using CMG Configuration Manager. Information on CMG Web specific settings can be found in the CMG CM Online help.

To verify the CMG Web installation, do the following:

- Make sure there is license installed in ELM.
- Verify that the user **CMGWeb** is created in CMG CM and has CWI Service rights added with a valid, default user view assigned.
- Check that CMG Web can be started. Start Internet Explorer, type `http://<servername>/BluStarWeb` in the address bar and login.

- Make a directory search. This requires that there are records entered in the CMG database. If there are not, enter a few test records in Directory Manager for test purposes. Start Internet Explorer, type `http://<servername>/CMGDM` in the address bar and login.
- Further tests of CMG Web require that the connection between the CMG system and the call manager is established.

Perform a Basic Configuration of CMG Server

Do the following:

1. Open **CMG Configuration Manager**.
2. If needed, set up new customer groups by expanding **Site Configuration** in the sidebar and clicking **Customer Groups**. Customer group (01) is created as default group.
3. In the database, there is a default company with default settings installed. You can edit the settings by expanding **Site Configuration** in the sidebar and then clicking **Companies/Views,Ext...** You can, for example, edit and add the following:
 - **Name** – The company name. There can be more than one company on one server.
 - **Servername** - The CMG server. It is recommended that you enter the static numerical IP address of the server.
 - **Views** - The customer groups that can be accessed when logged in to a certain company view. Click the **New...** button, select **View** and click **OK**. In the new window, enter the name of the view in the **Name** field and the customer groups in the **Customer group list** field. Click **OK** when finished.
 - **Extensions**- Extensions/number series that belong to the certain company. Click the **New...** button, select **Extension** and click **OK**. In the new window, select a PBX from the drop-down list and enter information in the **Low number**, **High number** and **Flash ICP** fields. Click **OK** when finished.
 - Enter the activity codes of your choice by expanding **Site Configuration - Diversions** in the sidebar and then clicking **PBX Codes**. By clicking on the check boxes by the flags, you get access to editing the activity codes of different languages.

NOTE: Consult your PBX partner to verify that the settings of the activity codes are correct.
4. Enter new users in the CMG system. Expand **Site Configuration** in the sidebar and then click **All Users**.
 - a. Click **New User...** to set up the account. Enter values in the **Name**, **Password** and **Fullname** fields and click **OK**.
 - b. Click **Add Service** to set the rights for the user. Select the appropriate service rights and then click **OK**.

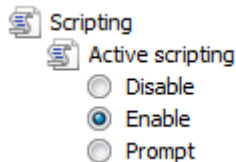
NOTE: Integration with MX-ONE Provisioning Manager (user and extension management application) requires a user account with permission to access CMG Web Service Interface (CWI).
 - c. Select **Add User Views** by expanding **Site Configuration** in the sidebar and then clicking **Companies/Views, Ext....** Define what part of the database the user will be given.

5. If desired, configure the possibility for CMG Web users to send requests to change their user information. The Change Request function is configured using Configuration Manager and Directory Manager. Do the following:
 - a. Open **CMG Configuration Manager** and expand **CMG Web**. Click **Parameters** and do the following:
 - Make sure **ChangeRequestMode** is set to ENABLED.
 - b. Expand **CMG Office modules**. Click **Parameters** and do the following:
 - Type the e-mail address for **UpdMailTo** to the directory administrator (or an address to a group of administrators).
 - Check that the path in the parameter **UpdMailSavePath** is correct.
 - Create the corresponding folder for **UpdMailSavePath** at the path destination.
 - c. Open **CMG Directory Manager** and do the following:
 - In **Settings**, add a user with the same e-mail address as the administrator for change requests specified in CMG Configuration Manager.

Enable Active Scripting for Configuration Manager or Directory Manager

You must enable active scripting if the Configuration Manager or Directory Manager is running in Internet Explorer. Do the following:

1. Open **Internet Explorer**.
2. Select **Tools - Internet options** from the main menu.
3. Click the **Security** tab, then click **Custom level...**
4. In the **Security Settings - Internet Zone** dialog, go to the **Scripting** section. Select **Enable** for **Active scripting**:



Enable Click-to-Dial if Using CMG Web with MiVoice MX-ONE

The Click-to-Dial function enables clicking on a telephone number in CMG Web to call the number when using CMG Web with MiVoice MX-ONE.

NOTE: The call back click-to-dial option cannot be used from a “forked extension”, i.e. multiple terminals associated to the same number, in MiVoice MX-ONE.

To enable Click-to-Dial, do the following:

1. Open **CMG Configuration Manager**.
2. To enable Click to Dial, expand **CMG Office Modules** in the sidebar and then click **Parameters**.
 - a. Set **ClickToDial** to ENABLED.
 - b. Click **Save**.

3. To enable Click to dial for the PBX, expand **Site configuration** in the sidebar and then click **Parameters PBX:s & Flash clients**.
 - a. Select the **Click to Dial** check-box in the **PBX:s** configuration to the right.
NOTE: Click to Dial is only valid for MX-ONE Service Node, not for Mitel TSW.
 - b. Specify the host name in the **Click to dial link** field.
 - c. Enter account and password in the **User Account** and **User Password** fields.
NOTE: The administration user (UserAccount) and password (UserPassword) fields are not used when using MiVoice MX-ONE.
 - d. Define the prefixes for calling, in the fields:
 - **External Prefix**
 - **Abroad Prefix**
 - e. Define the maximum number length for extensions in the **Dial Prefix** field.
 - f. Click the **Save** button.
4. Click to Dial must also be enabled for the users that should have this service. This is done in CMG Directory Manager. Do the following:
 - a. Open **CMG Directory Manager**
 - b. For each user, click the **Settings** tab and select the **Click and dial** check-box.
 - c. Click the **Save** button.

Setup Connection to the Call manager

There are different installation and configuration procedures for the communication between a CMG server and a call manager. For detailed information, refer to CMG configuration Guide [5].

Setup Connection to the E-mail System

After establishing the connection between the communication platform and the CMG System, it is time for setting up the connection to the e-mail system. Supported e-mail systems are:

- IMAP
- SMTP
- Lotus Notes

For detailed information, refer to CMG configuration Guide [5].

Technical Assistance

Mitel provides www.mitel.com as a starting point for technical assistance regarding all products, including the CMG application suite. From here, partners can obtain online documentation, FAQs, latest software updates and request further technical assistance.

References

- [1] Mitel Installer Overview
- [2] CMG System Overview
- [3] CMG Installation Preparation Guide
- [4] CMG Installation Guide
- [5] CMG configuration Guide
- [6] Calendar Connection Configuration Guide
- [7] CMG Web Compatibility Matrix (Note: available on InfoChannel)
- [8] Enterprise License Manager Technical Guide

