

WinPDM

INSTALLATION AND OPERATION MANUAL



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1. About this document

This document is intended as a guide for installation, maintenance and troubleshooting of Portable Device Manager (WinPDM) and is relevant for:

- Installation and parameter setup
- Device administration and WinPDM daily use

The WinPDM provides a generic application for managing all devices (for example, handsets and chargers) on one or more sites. The WinPDM makes it possible to edit parameters, update software in the devices and upload files. It can save parameters and software for individual sites in a database.

2. Introduction

2.1 Abbreviations and Glossary

EAP	Extensible Authentication Protocol.
License information file	A file containing license keys for devices. The file can be exported from the License Web and imported to WinPDM.
License key	The unique license key for a specific device with a specific functionality.
WiFi	WiFi stands for Wireless Fidelity and is a term developed by the Wi-Fi Alliance® to describe wireless local area network (WLAN) products that are based on the Institute of Electrical and Electronics Engineers' (IEEE) 802.11 standards. Today, most people use WiFi as a reference to wireless connectivity.
VoIP	Voice over Internet Protocol.
VoWiFi	Voice over Wireless Fidelity: a wireless version of VoIP and refers to IEEE 802.11a, 802.11b, 802.11g, and 802.11n network.
CSV file	Comma Separated Value: A file with data, where values in each row are separated by a delimiter, which can be a comma, a semicolon or a tab.
Device	Can for example be a charger, desktop programmer, or a handset that is connected to WinPDM.
GUI	Graphical User Interface.
JRE	Sun Java Runtime Environment.
Language file	Language file for handset or WinPDM.
Number	Settings for the complete set of parameters of a single device, tied to a specific identity.
Parameter definition file	Defines the parameters for a device; for example a handset.
WinPDM	Portable Device Manager. An application, running on a computer, for management of devices.
Package file	A file including different types of files, such as software files, parameter definition files or template files.
Prefix	First set of digits/characters of a telephone number. For example country code, PBX specific codes etc.
Site	Contains information of devices and Numbers.
Software file	A file including software for a device.
Template	General settings for a specific device. A template can be applied to several Numbers of the same device type.

USB**Universal Serial Bus:**

A serial bus standard to interface devices, for example connect computer peripherals such as mice, keyboards, scanners, and so on.

2.2 WinPDM Description

2.2.1 WinPDM Terminology

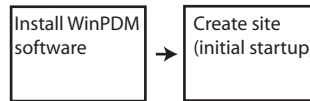
This section gives a brief description of the basic terminology in WinPDM.

License	licensed functionality for a device.
Tabs	in the WinPDM there are four different tabs. In these tabs, the information for devices, Numbers, templates and licenses are shown.
Software	is the software used in devices. The device software can be updated via WinPDM.
Version	parameter definition files and device software are indicated by versions.
Importing	different types of files can be imported.
Associate	before being able to synchronize parameters between WinPDM and devices, it is necessary to associate a Number with the device. Association includes all parameters. If it exists on that device type, it also includes Contacts.
Assign	it is possible to assign a Number to a device that has not yet been assigned a Number in the WinPDM. Assign includes only the parameters defining the Number.
Device	can be a charger, a desktop programmer or a handset that can be connected to WinPDM.
Number	the complete settings for a single device
Template	general settings for a specific device type. A template can be applied to several Numbers of the same device type
Parameter definition file	a file including all possible settings for a certain device type. Templates are created from parameter definition files.
Package file	a file that can contain other files, such as parameter definition files, software files and template files.

3. Installation and Configuration of WinPDM

This section describes the basic settings required to getting started with the WinPDM. The basic settings and the sequence in which they should be completed are illustrated in [Figure 1](#).

Figure 1. Basic settings



3.1 Software Installation

NOTE: Do not connect any devices to the computer before installation.

- 1 Locate the software provided by your supplier.
- 2 Double-click on the **Setup.exe** file located in the **Mitel WinPDM x.x.x** folder, where x.x.x represents the software version of WinPDM.
- 3 Follow the instructions given by the Setup Wizard.

If an older version of WinPDM is installed, the setup wizard will uninstall the older version before installing the newer WinPDM version.

3.2 Software Configuration

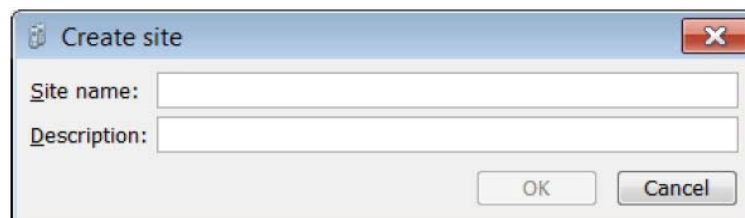
3.2.1 Initial Startup

- 1 From **Windows Start** menu, select **All Programs >Mitel WinPDM >Mitel WinPDM**.

NOTE: Windows Firewall may alert you of “PMServer” etc. You can ignore these security alerts, it will not affect the WinPDM, but then the alerts will appear every time the WinPDM is started. A better way is to select **Continue blocking** or **Unblock**.

The very first time the WinPDM is started, a **Create site** window appears.

Figure 2. The Create site window.



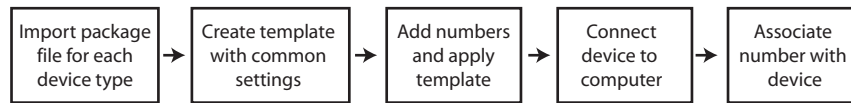
- 1 In the **Site name** field, enter a site name.
- 2 In the **Description** field, enter a description of the site (optional).
- 3 Click the **OK** button.

NOTE: Additional sites can also be created. See [5.4 Site Management](#) on page 26.

4. Initial Configuration of Devices

This section applies to new devices that shall be configured the very first time. The devices are delivered with factory settings from the manufacturer. The initial settings and the sequence in which they should be completed are illustrated in [Figure 3](#).

Figure 3. Initial configuration of devices



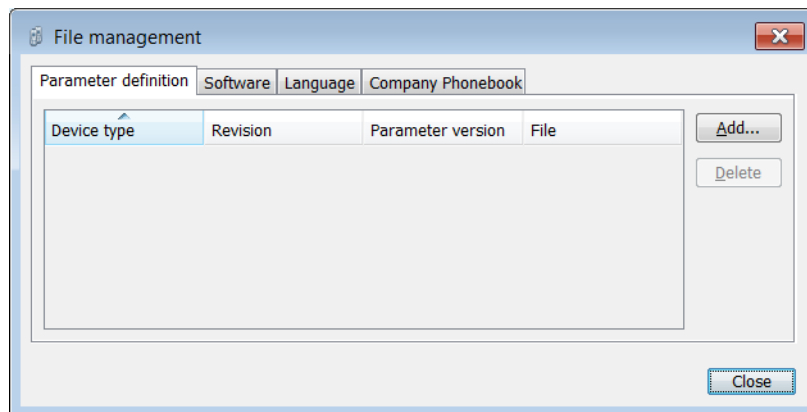
4.1 Import Package Files

The package files (.pkg) for your devices are distributed by your supplier. The package file includes the following:

- A software file (.bin) used for upgrading the device
- A parameter definition file (.def) including the parameters that can be configured in the device.
- Templates might also be included. The templates can for example include parameter settings for different exchange system.

NOTE: It is recommended to import the latest released package files for your devices.

- 1 From the **File** menu, select **File management**.

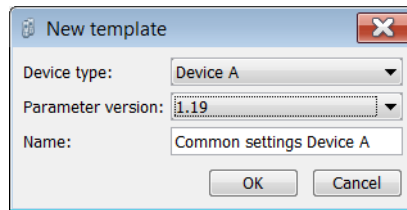



- 2 Click the **Parameter definition** tab and then click the **Add** button.
- 3 Select the package file (.pkg) to be imported and click the **Open** button.

4.2 Create Template with Common Settings

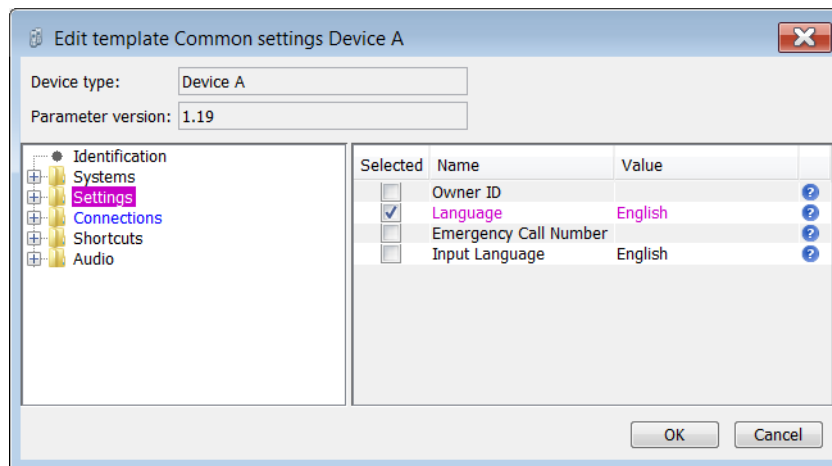
This section describes how to create a template including common settings that can be applied to the device's numbers later on.

- 1 Click the **Templates** tab.
- 2 From the **Template** menu, select **New**.



- Select which device type the template should be applicable for
 - Select which parameter version the template should be based on. The parameter version determines which parameter settings that are available for your device type. It is recommended to select the latest parameter version to obtain full compatibility with the device.
 - Enter an appropriate name of the template
- 3 Click the **OK** button.
- 4 The **Edit template** dialog window opens showing parameters organized in a tree structure in the left pane, with the parameters in the current node in the right pane. Clicking the  icon will give a short description of selected parameter. In addition, see also the manual for the device for more information about the parameter.

Select the parameters to be saved in the template by selecting the check box to the left of each parameter. Change the parameters to the desired values.



In the **Edit template** window, the following color coding is used:

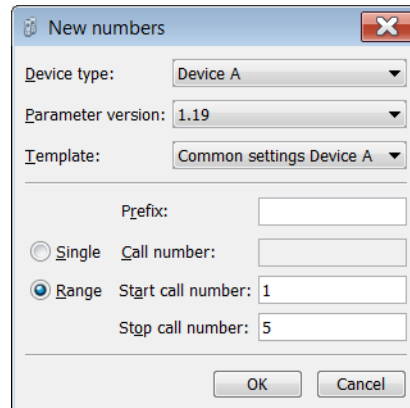
Color	Description
Black	Normal
Dark blue	Parameter has been edited during the current session
Purple	The parameter is included in the template (checked)
Red	Value not valid
Turquoise	The value differs from the default value

- 5 When all needed parameters have been configured, click the **OK** button to save the settings.

4.3 Create Numbers and Apply Template

This section describes how to create numbers to be associated with the devices later on. In addition, the common settings will also be applied to the numbers through the template you created earlier.

- 1 Click the **Numbers** tab.
- 2 From the **Number** menu, select **New**.



- 3 In the **Device type** drop-down list, select which device type the number(s) is created for.
- 4 In the **Parameter version** drop-down list, select the same parameter version used when you created the template for your device type.
- 5 In the **Template** drop-down list, select which template to be applied to the number(s).
- 6 In the **Prefix** field, enter the prefix (if needed) to be added to the number(s).
- 7 Select one of the following options:
 - To create a single number, select the **Single** option and enter the number.
 - To create a range of numbers, select the **Range** option. Enter the start number and end number.

NOTE: The maximum range that can be added at a time is 100 numbers.
- 8 Click the **OK** button.

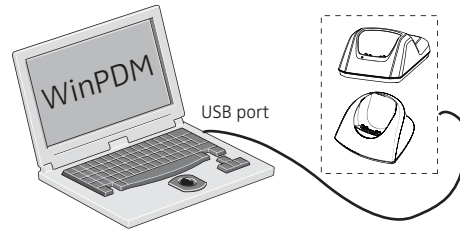
4.4 Connect Device to Computer

This section describes how to connect the devices to the computer running WinPDM.

The device is connected to the computer running the WinPDM via the USB port. The device must be set up to handle this connection according to the instructions in the manual for the device.

Example of connected devices are shown in [Figure 4](#).

Figure 4. Connection to the computer running WinPDM

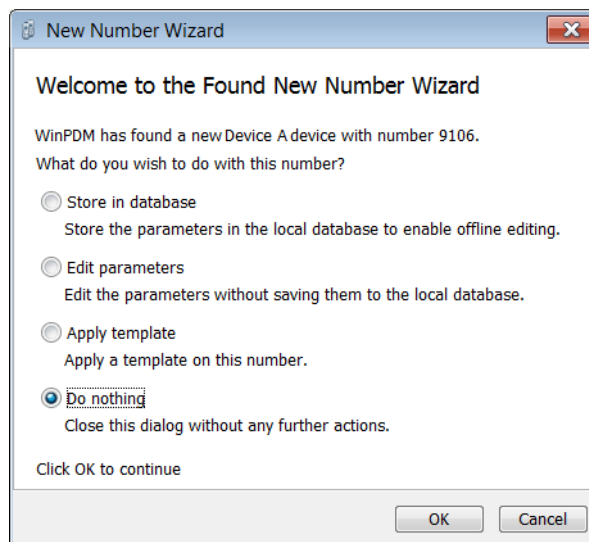


Depending on connected device, a **Device Wizard** window or a **New Number Wizard** window might be shown. In this case, click the **Do nothing** option and then click the **OK** button.

Figure 5. The Device wizard



Figure 6. The New Number wizard

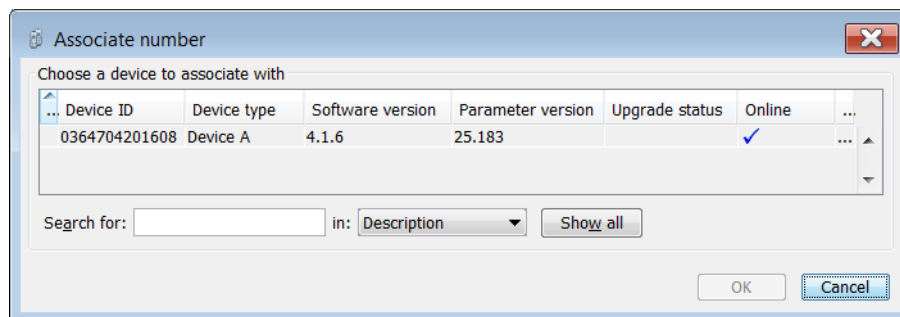


The device should now appear as online in WinPDM indicated by ✓ in the **Online** column.

4.5 Associate Number with Device

This section describes how to configure the connected device with the number you created earlier and also to apply the common settings for the device.

- 1 Click the **Numbers** tab.
- 2 Select the device to be associated with a number.
- 3 From the **Numbers** menu, select **Associate with device**.



- 4 Select the device to be configured with the selected number.
- 5 Click the **OK** button.

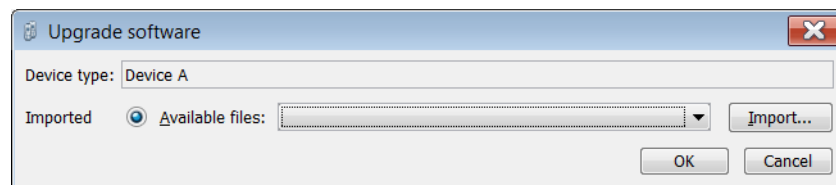
NOTE: If you cannot find your device in the list, the device is not compatible with the parameter version used when you created the number. In this case, the device's software must first be updated and then you can associate the number with the device.

4.6 Upgrade a Device with New Software

This section describes how to upgrade the software in a device. To be able to associate a number with a device later on, the device's parameter version must be compatible with the number's parameter version. The compatible parameter version is applied to the device when upgrading the device's software.

Additionally, newer software versions might be available since the device was delivered from the manufacturer, and it is therefore recommended to upgrade the device with the latest released software version.

- 1 Click the **Devices** tab.
- 2 Select the device to be upgraded.
- 3 From the **Device** menu, select **Upgrade software**.
- 4 In the **Available files** drop-down list, select the software to be uploaded.



- 5 Click the **OK** button.

The software will be downloaded to the device. A progress bar in the **Status** column for the device shows the progress of the download.

NOTE: To cancel the upgrade, right-click the device in the list and select **Cancel current upload**.

The device will restart automatically after a successful download.

- 6 When the device has been upgraded; the upgrade status shows Complete, the new software version, and the new parameter version for the device are also shown.

Figure 7. Example of completed software upgrade

Search for:

in:

Description

Show all

Description	Device ID	Device type	Software version	Parameter version	Upgrade status
	036123456789	Device A	4.1.6	15.101	Complete

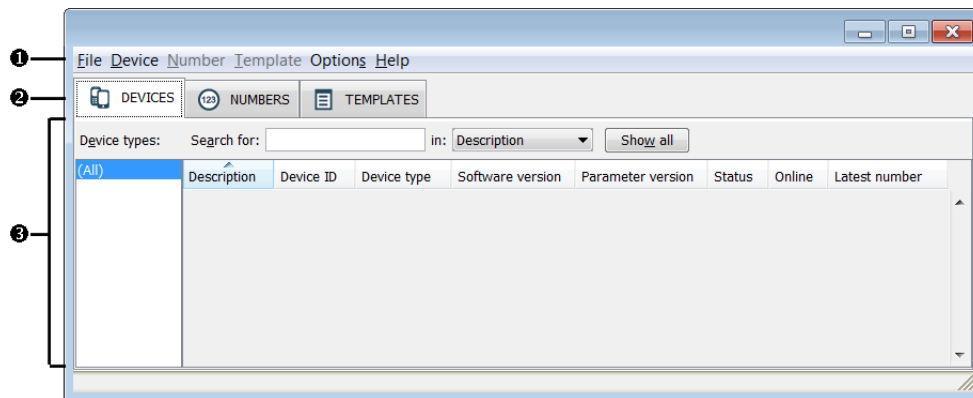
5. Operation

5.1 The WinPDM GUI

5.1.1 WinPDM Window

The WinPDM window has a menu bar (1), three tabs (2) and a work area (3). When a tab is selected the available device types will be shown in the left hand pane of the work area. The right pane of the work area shows devices, numbers, and templates already configured.

Figure 8. WinPDM overview



Search Field

In the upper part of the Work area there are search fields where different search criteria can be selected depending on which tab that is displayed. The search field is color coded green or red depending on if there are possible matches to the search criteria or not.

Sort the List

By default the lists are sorted by the first column. To sort the list by any other column, click the column heading. To reverse the sort order, click the column heading again. The sort order is indicated by an up or down arrow in the column heading.

Filter the List

By default the list in each tab shows all available Devices, Numbers or Templates. It is possible to filter the list by selecting a device type in left pane.

5.1.2 Color coding

General color coding

- If the version number is shown in red, WinPDM has found no parameter definition files supporting that device type.
- If the version number is shown in dark red, the parameter definition file is compatible, but does not have exactly the same version as the device.

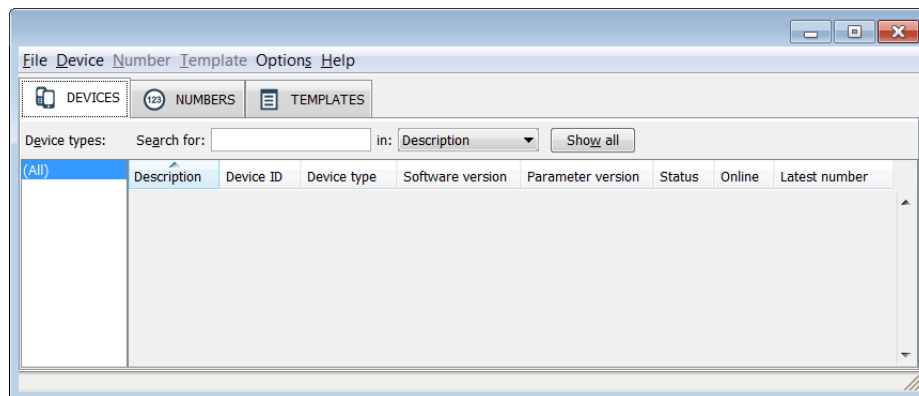
Color coding for parameter and template editing

In the parameter and template editing windows, the following color coding is used:

Color	Context	Description
Black	General	Normal
Dark blue	For templates and parameter editing	Parameter has been edited during the current session
Purple	For templates	The parameter is included in the template (checked)
Red	For templates and parameter editing	Value not valid
Turquoise	For templates and parameter editing	The value differs from the default value

5.1.3 Tabs

Devices Tab



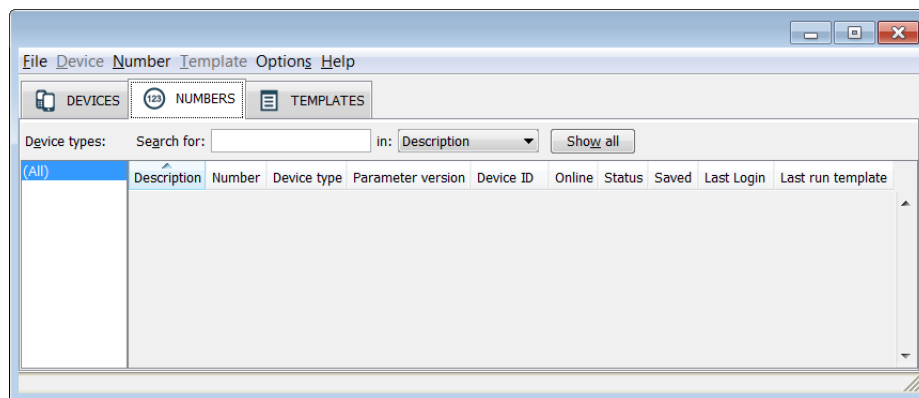
The view shows all devices configured at the site in a detailed list. The following information can be displayed:

- Description – optional information of a device that can be added by the WinPDM user. For example, the user of the device.
- Device ID – the unique identifier of the device.
- Device type – the device model.
- Software version – the version of the software in the device.
- Parameter version – the version of the parameters in the Number
- Status – might show one of the following symbols:
 - ↓ – new software upgrade is in progress (a green arrow). It is also possible to see a progress bar when the device is being upgraded.
 - ↓ – software upgrade Pending, Request sent, or Accepted.
 - ↻ – Retrying
 - ↓ – the last upgrade Failed or Aborted (a red broken arrow).

- Online – shows if the device is connected to the computer running WinPDM. When connecting a device to the WinPDM, it might take a while before the device goes online. The ✓ symbol indicates a device that has become connected/online.
- Latest number - shows the latest known Number for a device.

Numbers Tab

Figure 9. The Numbers tab



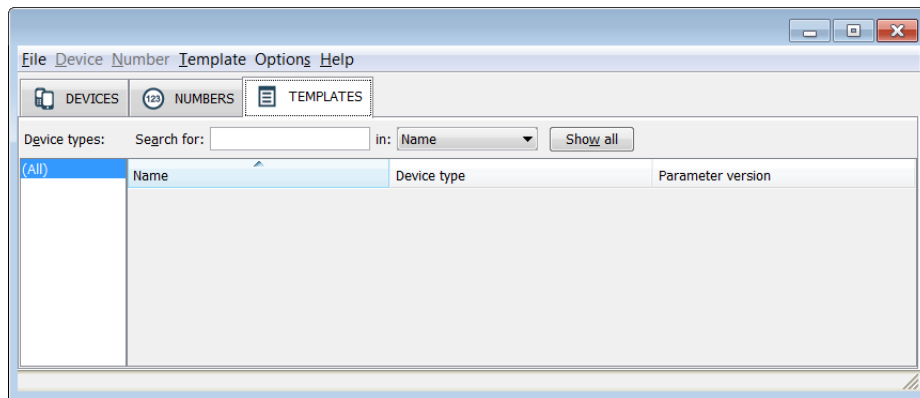
The view shows all Numbers configured at the site in a detailed list. The following information can be displayed:

- Description – optional information of a device that can be added by the WinPDM user. For example, the user of the number.
- Number – the unique identifier of the Number. The identifier is unique for that device type.
- Device type – the device model the Number is intended for.
- Parameter version – shows the version of the parameters in the Number.
- Device ID – the unique identifier of the device that the Number is associated to.
- Online – shows if the device the Number is uploaded to is connected to the computer running WinPDM. It might take a while before a connected device goes online in the WinPDM. The ✓ symbol indicates a device that is online/connected.
- Status – shows the parameter synchronization status. A Number can also be queued for synchronization. Several different indications are used, for example Synchronizing, Synchronized, etc. When the Number is offline, the status Synchronized or Not synched is shown.
- Saved – shows if the Number's parameters have been stored in the database. The ✓ symbol indicates that the parameters have been stored.
- Last login – shows the latest date and time the device was online in WinPDM/ logged in to WinPDM.
- Last run template - indicates which template that was last run for that Number.

Templates Tab

The view shows all templates configured at the site in a detailed list. The following information can be displayed:

Figure 10. The Templates tab



- Name – the name of the template.
- Device type – the device model.
- Parameter version – shows the parameter version.

Licenses Tab

NOTE: The License tab might not be applicable for all handsets.

The view shows all devices configured at the site in a detailed list. The following columns are displayed:

- Device ID – the unique identifier of the device.
- Device type – the device model.
- Online – shows if the device is connected to the Device Manager. The symbol indicates that the device is online.
- Serial number – the number identifying the device hardware.
- Number – the unique identifier of the Number. The identifier is unique for that device type.
- Software version – shows the version of the software in the device
- Status – shows the license synchronization status.

Examples of status that can be shown are.

"Sending" means that WinPDM is sending license information to the device.

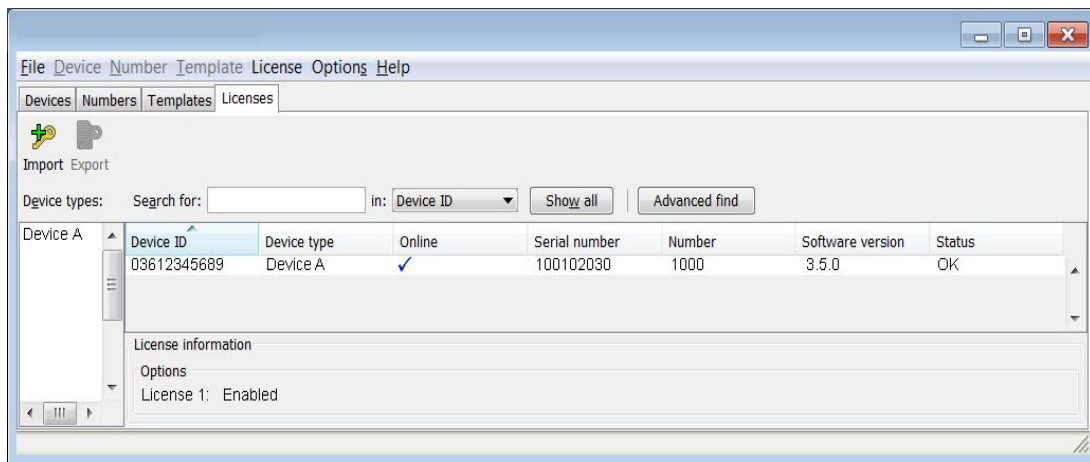
"Server failure" means that there is some kind of error with the communication between

WinPDM and the license server.

"Needs update" - An attempt to move a license from one handset to another has been made, but the latest license does not exist in the handset.

In the bottom of the work area, the license options of the device are listed and whether the options are enabled or not.

Figure 9. The Licenses tab in WinPDM



5.1.4 Manage Certificate for a VoWiFi Handset

Certificates are used for authorizing a VoWiFi handset to access a WLAN system using the Extensible Authentication Protocol (EAP).

There are two types of certificates: Root certificate and client certificate.

The root certificate contains a public key and can be downloaded to the VoWiFi handset via WinPDM. The client certificate contains both a public key and a private key and can be downloaded to the VoWiFi handset via the WinPDM.

The VoWiFi handset uses the root certificate to check if the WLAN system is trusted. If the system is trusted, the handset sends the client certificate to show that it is authorized to access and log on to the system.

The following must be done to be able to use certificates:

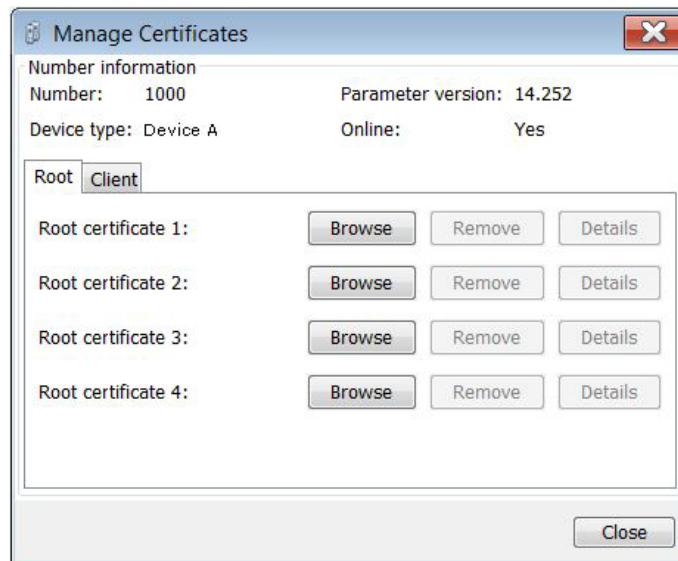
- Import certificates to handset, see Import Certificates.
- Select which client certificate to be used by setting an EAP client certificate parameter, see the Configuration Manual for the VoWiFi handset.

Import Certificates

NOTE: Before proceeding, make sure that the handset is online () in WinPDM. Both certificates will be stored in the handset.

- 1 Select the "Numbers" tab.
- 2 In the Number menu, select "Manage certificates". Alternatively, right-click in the handset in the list and select "Manage certificates".

Figure 11. Certificate dialog window



In figure 12, the following information is displayed:

- The number of the device
 - The device type
 - The parameter version
 - The online status of the device
 - Imported certificates (if any)
- 3 Click the Root- or the Client certificate tab depending on which certificate to be managed.
 - 4 Click "Browse" and locate the certificate file to be imported.
 - 5 If the certificate is protected, an Enter Password dialog opens. Enter the password and then click "OK".

A Confirm Certificate window opens showing the details of the certificate.

- 6 Import the certificate to the device by clicking "Yes".

If needed, repeat step 3 - 6 for editing additional certificates.

Additional settings are required for selecting which certificate the handset shall use. See Configuration Manual for the handset. **View Certificate Details**

- 1 Select the "Numbers" tab.
- 2 In the Number menu, select "Manage certificates". Alternatively, right-click the handset in the list and select "Manage certificates".
- 3 Click the "Root" tab or the "Client" tab depending on which certificated to be viewed.
- 4 Select the certificate to view by clicking the corresponding "Details" button.

A Certificate details window appears showing the details of the certificate.


Remove Certificate

- 1 Select the "Numbers" tab.
- 2 In the Number menu, select "Manage certificates". Alternatively, right-click the handset in the list and select "Manage certificates".

- 3 Click the “Root” tab or the “Client” tab depending on which certificated to be removed.
- 4 Select the certificate to be removed by clicking the corresponding “Remove” button.
- 5 Click “Yes” to confirm the deletion.

The certificates are now removed to the handset. Additional settings are required for selecting which certificate the handset shall use (if any). See the handset's Configuration Manual.

Edit Parameters

The Edit Parameters dialog shows the set of parameters for the Device/Number. The parameters are organized in a tree structure in the left pane, with the parameters in the current node in the right pane. Clicking the icon  will give a short description of selected parameter.

NOTE: If Edit parameters was selected in the Device Wizard window, or in the New Number Wizard window, continue from step 4.

- 1 In the Numbers tab, select the device to be edited.
- 2 In the Number menu, select “Edit”. Alternatively, right-click and choose “Edit”, or double-click the device.

Figure 12. Edit Parameters dialog



- 3 In the left pane, select the parameters to be edited.
- 4 In the Value column, make your changes.

When a parameter has been edited, the node in the left pane changes to a blue color.

- 5 Click “OK” to save the changes, or click “Cancel” to undo all parameter changes. When saving the changes, the parameters are automatically sent to the device when it is online in WinPDM.

5.1.5 Language Settings for WinPDM GUI

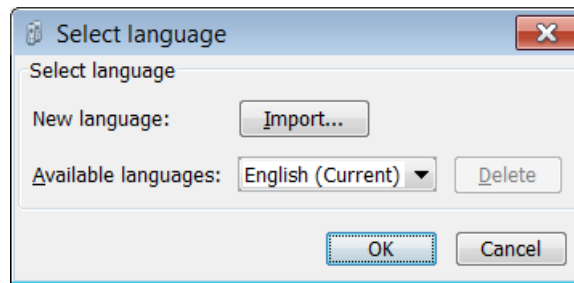
It is possible to select the language to be used in the menus in WinPDM by importing a language file with the file extension *.xml.

The default language is english, and stored as a default translations file in your installation directory at installation:

C:\Program Files\Mitel\WinPDM\Client\default-translations.xml

This file can be copied and edited to create a new language and can then be imported as described below.

- 1 From the **Options** menu, select **Select language**.



- 2 Click the **Import** button.
- 3 Select the language file (.xml) to be imported and click the **Open** button.
- 4 In the **Available languages** drop-down list, select which language to use.
- 5 Click the **OK** button.

TIP: For adding a new language to a device, see [5.9.6 Import Language Files for Devices](#) on page 43 and [5.9.10 Delete Imported Files for Devices](#) on page 44.

5.2 The Device Wizard

When a device without a number is connected to the WinPDM, the **Device Wizard** window appears.

Figure 13. The Found Device Wizard window.



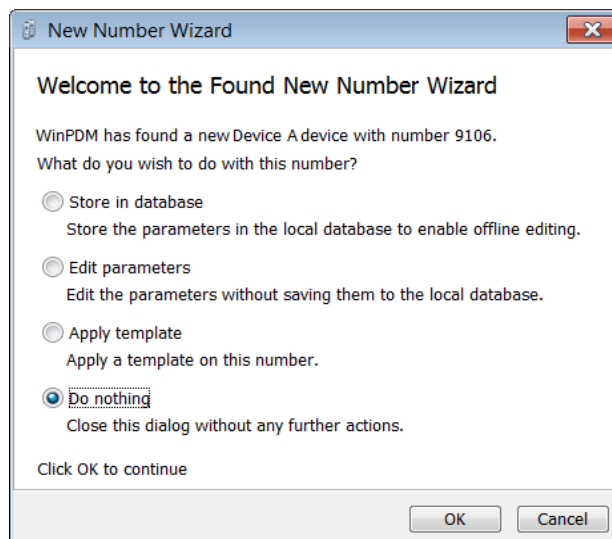
There are four choices in the wizard:

- Associate with number, see [5.5.5 Associate a Number with a Device](#) on page 31.
- Edit parameters, see also [5.5.4 Edit Parameters](#) on page 31.
- Apply template, see also [5.5.4 Apply Template to set Parameter Values](#) on page 31.
- Do nothing

5.2.1 The New Number Wizard

When a new device with an unsaved Number is connected, the **New Number Wizard** window appears.

Figure 14. The New Number Wizard window.



There are four choices in the wizard:

- Store in database
- Edit parameters, see also [5.5.4 Edit Parameters](#) on page 31.

- Apply template, see also [5.5.4 Apply Template to set Parameter Values](#) on page 31.
- Do nothing

5.3 Open the WinPDM

- From **Windows Start** menu, select **All Programs > Mitel WinPDM > Mitel WinPDM**.

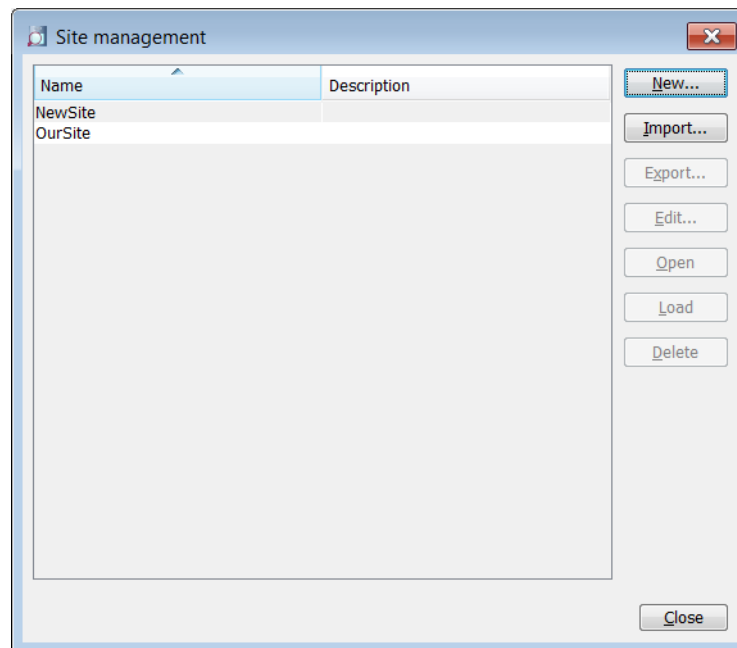
The view of the last used Site opens. To open another site, see [5.4.2 Open Site](#) on page 26.

5.4 Site Management

By creating a Site for each customer installation, devices and software can be managed for that site. The settings are saved in a database.

NOTE: There is a subtle but important difference between loading and opening a site. When a site is opened, the **Site management** dialog closes and it is possible to start working with the devices in the site. When a site is loaded, the **Site management** dialog stays open, making it possible to continue with site management tasks, such as creating and deleting sites.

Figure 15. The Site management window



5.4.1 Create New Site

- 1 From the **File** menu, select **Site management**.
- 2 Click the **New** button.
- 3 Enter a name for the site and a description (optional) and click the **OK** button.

5.4.2 Open Site

- 1 From the **File** menu, select **Site management**.

- 2 Select the site to be opened and click "Open".

5.4.3 Load Site

- 1 From the **File** menu, select **Site management**.
- 2 Select the site to be loaded.
- 3 Click the **Load** button. The view in the main window changes to the newly opened site.

5.4.4 Delete Site

- 1 From the **File** menu, select **Site management**.
- 2 Make sure that the site to be deleted is not currently active. If it is active, load another site (see [5.4.3 Load Site](#)).

NOTE: If there is only one site remaining, it cannot be deleted.

- 3 Select the site to be deleted and click the **Delete** button.
- 4 Click the **Yes** button to confirm the deletion.

5.4.5 Import Site

When importing a site, numbers with parameters and devices are imported. Templates, software and definition files are not imported.

- 1 From the **File** menu, select **Site management**.
- 2 Click the **Import** button.
- 3 Select the Site file (.ste) to be imported and then click the **Open** button.
- 4 In the **Input** dialog, enter a name for the site and click the **OK** button.

5.4.6 Export Site

- 1 From the **File** menu, select **Site management**.
- 2 Select the site to be exported and click the **Export** button.
- 3 Select the location where the exported file should be saved.
- 4 Enter a file name of the site (.ste) and then click the **Save** button.

5.5 Numbers

5.5.1 Create New Numbers

- 1 Click the **Numbers** tab.
- 2 From the **Number** menu, select **New**.
- 3 In the **Device** type drop-down list, select device type.
- 4 In the **Parameter version** drop-down list, select the parameter version.
- 5 In the **Template** drop-down list, select which template to apply to the Number. This is optional and therefore "None" can be selected.
- 6 In the **Prefix** field, enter the Number's prefix (if needed).

- 7 Select one of the following options:
 - To create a single Number, select the **Single** option and enter the call number.
 - To create a range of Numbers, select the **Range** option. Enter the start call number, end call number.

NOTE: The maximum range that can be added at a time is 100 Numbers.

- 8 Click the **OK** button.

5.5.2 Save a Number to Database

The number of an online device can be saved to the database.

- 1 Click the **Numbers** tab.
- 2 Select the device which number to be saved.
- 3 From the **Number** menu, select **Save**.

5.5.3 Enter/Edit Description of a Number

It is possible to enter information of a Number using WinPDM. For example, the description can be used to describe a user of a number.

- 1 Click the **Numbers** tab.
- 2 Select the number which description to be edited.
- 3 From the **Number** menu, select **Enter description**.
- 4 Enter an appropriate description and then click the **OK** button to save the setting.

4.5.4 Manage Certificate for a VoWiFi Handset

Certificates are used for authorizing a VoWiFi handset to access a WLAN system using the Extensible Authentication Protocol (EAP).

There are two types of certificates: Root certificate and client certificate.

The root certificate contains a public key and can be downloaded to the VoWiFi handset through WinPDM. The client certificate contains both a public key and a private key and you can download to the VoWiFi handset through the WinPDM.

The VoWiFi handset uses the root certificate to check if the WLAN system is trusted. If the system is trusted, the handset sends the client certificate to show that it is authorized to access and log on to the system.

The following must be done to be able to use certificates:

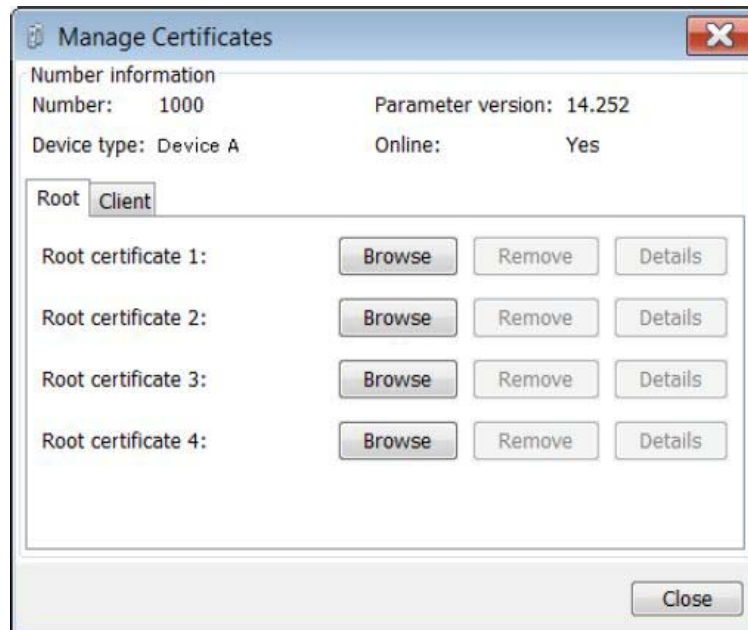
- Import certificates to handset, see Import Certificates.
- Select which client certificate to be used by setting an EAP client certificate parameter, see the Configuration Manual for the VoWiFi handset.

Import Certificates

NOTE: Before proceeding, make sure that the handset is online () in WinPDM. Both certificates are stored in the handset.

- 1 Select the "Numbers" tab.
- 2 In the Number menu, select "Manage certificates". Alternatively, right-click in the handset in the list and select "Manage certificates".

Figure 16. Certificate dialog window



In figure 13, the following information is displayed:

- The number of the device
 - The device type
 - The parameter version
 - The online status of the device
 - Imported certificates (if any)
- 3 Click the Root- or the Client certificate tab depending on which certificate to be managed.
 - 4 Click "Browse" and locate the certificate file to be imported.
 - 5 If the certificate is protected, an Enter Password dialog opens. Enter the password and then click "OK".

A Confirm Certificate window opens showing the details of the certificate.

- 6 Import the certificate to the device by clicking "Yes".

If needed, repeat step 3 - 6 for editing additional certificates.

Additional settings are required for selecting which certificate the handset shall use. See Configuration Manual for the handset.

View Certificate Details

- 1 Select the "Numbers" tab.
- 2 In the Number menu, select "Manage certificates". Alternatively, right-click the handset in the list and select "Manage certificates".
- 3 Click the "Root" tab or the "Client" tab depending on which certificated to be viewed.
- 4 Select the certificate to view by clicking the corresponding "Details" button.


A Certificate details window appears showing the details of the certificate.

Remove Certificate

- 1 Select the "Numbers" tab.
- 2 In the Number menu, select "Manage certificates". Alternatively, right-click the handset in the list and select "Manage certificates".
- 3 Click the "Root" tab or the "Client" tab depending on which certificated to be removed.
- 4 Select the certificate to be removed by clicking the corresponding "Remove" button.
- 5 Click "Yes" to confirm the deletion.

The certificates are now removed to the handset. Additional settings are required for selecting which certificate the handset shall use (if any). See the handset's Configuration Manual.

Edit Parameters

The **Edit Parameters** dialog shows the set of parameters for the Device/Number. The parameters are organized in a tree structure in the left pane, with the parameters in the current node in the right pane. Clicking the  icon will give a short description of selected parameter.

NOTE: If Edit parameters was selected in the Device Wizard window, or in the New Number Wizard window, continue from step 4.

- 1 In the Numbers tab, select the device to be edited.
- 2 In the Number menu, select "Edit". Alternatively, right-click and choose "Edit", or double-click the device.



- 3 In the left pane, select the parameters to be edited.
- 4 In the Value column, make your changes.

When a parameter has been edited, the node in the left pane changes to a blue color.

- 5 Click "OK" to save the changes, or click "Cancel" to undo all parameter changes. When saving the changes, the parameters are automatically sent to the device when it is online in WinPDM.

5.5.4 Apply Template to set Parameter Values

If a template has been created for a device type, it can be used to set the parameter values for a range of devices, or a single device.

NOTE: If Apply template was selected in the Device Wizard dialog window, or in the New Number Wizard dialog window, continue from step 4.

- 1 Click the **Numbers** tab.
- 2 Select the device(s) you want to apply the template on.
- 3 From the **Number** menu, select **Apply template**.
- 4 Select the template to be used and click the **OK** button.

5.5.5 Associate a Number with a Device

Before being able to synchronize parameters between WinPDM and devices, it is necessary to associate a Number with a device. It is possible to enter several Device IDs in advance and to associate them with a Number at a later moment.

NOTE: If Associate with number was selected in the Device Wizard window, continue from step 3.

- 1 Click the **Numbers** tab.
- 2 Select the number you want to associate with a device.
- 3 From the **Number** menu, select **Associate with device**.
- 4 Select the device you want to associate with in the list and click the **OK** button.

If the selected device is online, it will immediately be updated with the selected Number. If the selected device is not online, it will be updated the next time it is online.

It is possible to associate several Numbers with several devices simultaneously.

5.5.6 Delete a Number in the Site Database

- 1 Click the **Numbers** tab.
- 2 Select the device which number you want to delete.
- 3 From the **Number** menu, select **Delete**.
- 4 In the **Delete Numbers** window, click the **Yes** button.

NOTE: If a device that is online is deleted, it will stay in the list as online but not saved.

5.5.7 Rename a Number

- 1 Click the **Numbers** tab.
- 2 Select the device which Number you want to rename.
- 3 From the **Number** menu, select **Rename**.
- 4 In the **Rename number** window, enter a new prefix (optional) and a new Number and click the **OK** button.

5.5.8 Copy a Number

- 1 Click the **Numbers** tab.

- 2 Select the device which Number you want to copy.
- 3 From the **Number** menu, select **Copy**.
- 4 In the **Copy number** window, enter a new prefix (optional) and a new Number and click the **OK** button.

5.5.9 Import Contacts

NOTE: The number for the device must be saved, see [5.5.2 Save a Number to Database](#) on page 28.

Import Contacts From File

A file containing contacts can be imported to WinPDM and synchronized with a device. This can for example be useful when you want to transfer contacts from legacy devices to newer devices.

When importing the file, the device's contacts (if any) are overwritten by the contacts in the file. Additionally, the import works only if the device can store all contacts included in the file. For example; if the file contains 100 contacts, the device must have support for storing at least 100 contacts.

If needed, the number of contacts in the file can be changed by using Excel or other compatible application.

- 1 Click the **Numbers** tab.
- 2 Select the number which the contacts should be imported to.
- 3 From the **Number** menu, select **Import contacts > From file**.
- 4 Select file containing contacts (.txt, .csv, or .skv). Click the **Open** button.

The contacts in the imported file are synchronized with the device.

Import Contacts From Number

You can make a copy of a device's contact list and paste it to another device's contact list directly. This means that the contact list do not need to be saved on for example your computer.

NOTE: The import works only if the receiving device can store the entire contact list of the device you are importing from. For example; if the contact list contains 100 contacts, the receiving device must have support for storing at least 100 contacts. Additionally, the Company phonebook contacts included in the contact list are not transferred to the other device using this feature.

- 1 Click the **Numbers** tab.
- 2 Select the number which the contacts should be imported to.
- 3 From the **Number** menu, select **Import contacts > From number**.
- 4 Select the number which contacts to be copied.
- 5 Click the **OK** button.

The contacts are now imported to the handset.

5.5.10 Export Contacts

You can make a copy of a device's contact list that can be used as backup (.csv). The contact list can also be imported to another supporting device later on (see [Import Contacts From File](#) on page 32).

- 1 Click the **Numbers** tab.
- 2 Select the device which contacts to be exported.
- 3 From the **Number** menu, select **Export contacts**.
- 4 Enter a descriptive file name and click the **Save** button.

5.6 Devices

All work with devices is performed from the **Devices** tab.

- Devices can be added to a site by connecting the device to the computer.
- It is possible to transfer the information for a device to another device.
- Devices can be reset to factory settings.
- Devices can be updated with new software.

5.6.1 Add Devices to a Site

Before connecting a device to the WinPDM, make sure the connection is set up according to the instructions in the device's manual (for example, Installation Guide or Configuration Manual).

If a range of new devices are to be added to a site, the easiest way is to:

- 1 Create a template with all common parameter settings for the site. See [5.7.1 Create a Parameter Template](#) on page 36.
- 2 Add a range of Numbers and run the template. See [5.5.1 Create New Numbers](#) on page 27 and [5.5.4 Apply Template to set Parameter Values](#) on page 31.
- 3 Edit the parameters and change individual settings. See [5.5.4 Edit Parameters](#) on page 31.
- 4 Connect the physical devices, one after the other, and associate them with the Numbers in the site database. See [5.5.5 Associate a Number with a Device](#) on page 31.

A single device can be added in the same way.

5.6.2 Synchronize a Device

When a device is connected, it is synchronized with the associated Number in the WinPDM.

When a device is being synchronized, parameters that have been changed in the device are uploaded to the WinPDM, and parameters that have been changed in the WinPDM are sent to the device. If a parameter has been changed in both the device and the WinPDM, the setting made in the WinPDM will take precedence.

- 1 Click the **Numbers** tab.
- 2 Connect a device to the computer running the WinPDM. If the Number is saved, and it has a parameter definition, the device is automatically synchronized.

5.6.3 Delete a Device in the Site Database

- 1 Click the **Devices** tab.
- 2 Select the device to be deleted.
- 3 From the **Device** menu, select **Delete**.
- 4 In the **Delete Device** window, click the **Yes** button.

NOTE: It is not possible to delete a device that is online in WinPDM.

5.6.4 Replace a Device

If a device should be replaced with a new one, it is possible to transfer its associated Number to a new device. The new device must be of the same device type as the old one.

- 1 If the device to be replaced is still working, make sure that it is synchronized.
- 2 Connect the new device to the WinPDM.

Associate the new device to the Number associated to the old device as follows:

- 3 Click the **Numbers** tab.
- 4 From the **Number** menu, select **Associate with device**.
- 5 Select the device you want to associate with in the list and then click the **OK** button. The Number is no longer associated to the old device.

5.6.5 Create New Device

It is possible to enter several new Device IDs in advance into WinPDM for later association.

In order to simplify input when handling many devices, it is possible to use a bar code reader. The bar code reader should send a carriage return after each item, but it is not necessary. If carriage return is not sent, it is necessary to click **Create** after each read item.

- 1 Click the **Devices** tab.
- 2 From the **Device** menu, select **Add device**.
- 3 Select device type and parameter version.
- 4 Enter a Device ID for the device, manually or by using a bar code reader.
- 5 The **Continuous registration** check box can be used to select whether the **Create devices** dialog shall close after clicking **Create** or if it shall still be open.
- 6 Click the **Create** button.
- 7 Repeat 4 to 6 if more devices are to be created.

5.6.6 Assign a Number

It is possible to assign a Number to a device that has not yet been assigned a Number in WinPDM.

NOTE: Assign should not be done on a device that already has a Number.

- 1 Click the **Devices** tab.
- 2 Select the device that should be assigned a Number.

- 3 From the **Devices** menu, select **Assign number**.
- 4 In the **Assign number to device** window, enter a new prefix (optional) and a new Number
- 5 Click the **OK** button.

5.6.7 Enter/Edit Description of a Device

It is possible to enter information of a device using WinPDM. For example, the description can be used to describe a location of a device.

- 1 Click the **Devices** tab.
- 2 Select the device which to edit the description for.
- 3 From the **Device** menu, select **Enter description**.
- 4 Enter an appropriate description and click the **OK** button to save the setting.

5.6.8 Factory Reset

Factory reset means that the device parameters will be set to factory default settings. The Number in the database that is associated with the device will not be affected.

NOTE: The device must be online.

- 1 Click the **Devices** tab.
- 2 Select device(s) to be reset.
- 3 From the **Device** menu, select **Factory reset**.
- 4 Click the **Yes** button.

5.6.9 Device Properties

To get a summary of the properties of a device:

- 1 Click the **Devices** tab.
- 2 Select the device which properties you want to show.
- 3 From the **Device** menu, select **Properties**.

The following information is displayed:

- Description of the device (if entered by the WinPDM user)
- Device ID
- Device type
- Parameter version
- Software version
- Last known number
- Online status
- File upload information

5.7 Templates

Templates are a collection of user defined parameter values. These templates can be used to create common settings to be used on several devices of a certain device type.

NOTE: Templates created in one site are also selectable in the other sites used in WinPDM.

5.7.1 Create a Parameter Template

- 1 Click the **Templates** tab.
- 2 From the **Template** menu, select **New**.
- 3 Select device type and parameter version, enter a name for the template, and click the **OK** button.

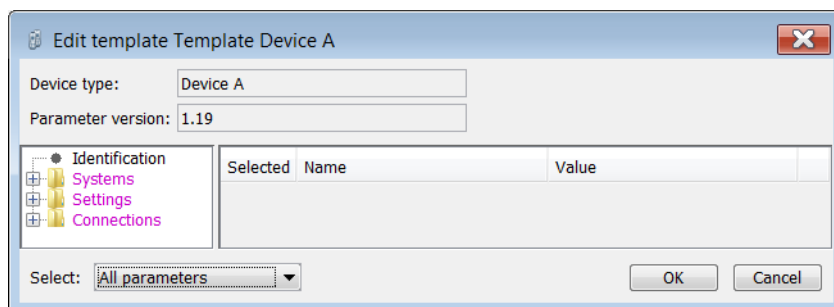
NOTE: If the wanted device type and/or parameter version is not found in the list, WinPDM needs to be updated with new parameter definition files, see [5.9.3 Import Parameter Definition Files](#) on page 43.

- 4 In the **Edit Template** window, select the parameters to be saved in the template by selecting the check box to the left of each parameter. Change the parameters to the desired values.
- 5 Click the **OK** button.

5.7.2 Create a Parameter Template from a Number

It is also possible to create a template from a number in the WinPDM. This can be used to save settings in the template that later on can be applied to other numbers.

- 1 Click the **Numbers** tab.
- 2 Select the number which settings to be used as template.
- 3 From the **Template** menu, select **Use as template**.
- 4 Enter a name for the template.
- 5 Click the **OK** button.



When creating a template based on a number, a Select drop-down list is shown in the bottom left corner. This setting decides which parameters that shall be copied from the device. If All parameters is selected, the synchronization time will be longer.

- 6 Select the parameters to be saved in the template by selecting the check box to the left of each parameter. Change the parameters to the desired values

It is also possible to create a template from a device that is online but not stored in the database. The template will contain all parameters for the device except for those that are Number specific.

5.7.3 Rename a Template

- 1 Click the **Templates** tab.
- 2 Select the template to be renamed.
- 3 From the **Template** menu, select **Rename**.
- 4 In the **Rename template** windows, enter a new name and then click the **OK** button.

5.7.4 Copy a Template

- 1 Click the **Templates** tab.
- 2 Select the template to be copied.
- 3 From the **Template** menu, select **Copy**.
- 4 In the **Copy template** window, enter a new name and then click the **OK** button.

5.7.5 Edit a Template

- 1 Click the **Templates** tab.
- 2 Select the template to be edited.
- 3 From the **Template** menu, select **Edit**.
- 4 In the **Edit template** window, edit the parameters and then click the **OK** button.

5.7.6 Delete a template

- 1 Click the **Templates** tab.
- 2 Select the template to be deleted.
- 3 From the **Template** menu, select **Delete**.
- 4 In the **Delete template** window, click the **Yes** button.

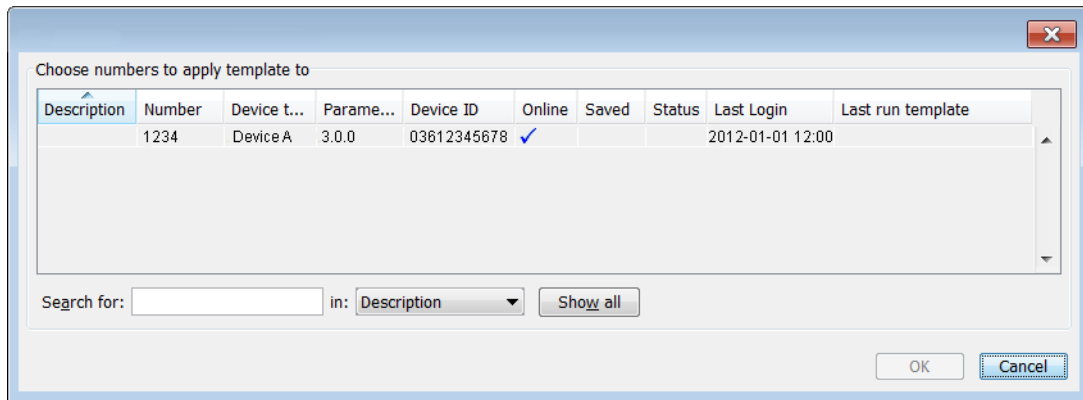
5.7.7 Upgrade a Template

NOTE: In order to upgrade a template, the new parameter version must have the same major version as the old parameter version. For example, upgrading from 25.8 to 25.9 works, but upgrading from 25.8 to 26.x does not work.

- 1 Click the **Templates** tab.
- 2 Select the template to be upgraded.
- 3 From the **Template** menu, select **Upgrade**.
- 4 Select the parameter version to upgrade to and then click the **OK** button.

5.7.8 Apply a Template

- 1 Click the **Templates** tab.
- 2 Select the template to be used.
- 3 From the **Template** menu, select **Apply to**.



TIP: It is possible to search for a device in the list using the **Search** field.

- 4 Select device(s) to apply the template on and then click the **OK** button.

5.8 Licenses

NOTE: This feature might not be applicable for all devices.

This section describes the device licensing features that can be done using the WinPDM. An overview of the device licensing concept is described in the Function Description for Product Licensing Overview documentation.

In WinPDM, device licensing offers a possibility to view, manage and upgrade licenses of devices. In the Licenses tab, devices are listed. If a device is selected in the list, the status of the license options for the selected device is displayed.

Note that some tasks include using the License Web and the details of how to work with the license web are not described here.

The following features are described:

- Upgrade licenses, "Import" and "Export"
- Manual synchronization of licensing information, "Refresh"
- View license options
- Filter license options

The following licensing features are not done with the WinPDM and are therefore not described in this document:

- How to work with the license web
- How to purchase licenses
- Manual license upgrade using handset

5.8.1 License Upgrade Alternatives

License upgrade includes using the license web which is described in the Function Description,

Product Licensing Overview documentation.

These are the alternatives for upgrading licenses on devices:

- Automatic license upgrade

Used when the WinPDM has an Internet connection to the license server, see "Language Settings for WinPDM GUI" on page 24.

- License upgrade using export/import

Used when the WinPDM does not have an Internet connection, see "Export and Import Licensing Information" on page 39.

- Manual license upgrade

Used to enter the license key manually in the device, see the manual for the corresponding device. In this case, the WinPDM is not used.

5.8.2 Automatic License Upgrade

NOTE: This feature requires an Internet connection.

The first time a device logs in to the WinPDM, it asks the license server if any licenses are available for the device. When the device logs in at a later time, there is no automatic check for licenses. If changes have been made, a manual upgrade must be done by selecting Refresh, see "Refresh" on page 41.

Automatic license upgrade is a way of upgrading automatically to the correct license for a device. In order to get a purchased license for a device, a connection with the license server is made. The WinPDM automatically gets device licensing information from the device, sends it to the license server which returns a license key that the WinPDM sends to the device. The device upgrades and the correct license information is shown in the WinPDM and the device.

5.8.3 Export and Import Licensing Information

In order to upgrade licenses on devices when the WinPDM does not have an internet connection to the license server, the following is done:

- The information needed for licensing of a device is exported from the WinPDM to a file, see "Export Licensing Information" on page 39.
- The file determines which additional license options that are available for the device. It can also be used to view the current license options of the device in the license web.
- From the license web, a license file containing the license keys for the device is generated
- The license file is imported to the WinPDM, see "Import Licenses" on page 40
- The WinPDM communicates the license key (included in the license file) to the device
- The device upgrades according to the license options

Export Licensing Information

The information needed for licensing of a device can be exported to a product information file.

This file can be used to generate licenses for the device.

- 1 Select the Licenses tab.
- 2 Select the device(s) that shall be exported.
- 3 In the License menu, select "Export". Enter a name for the file and click "Save".

Import Licenses

License files are used for upgrading devices with licenses. A license file can be imported to the Device Manager.

- 1 In the File menu, select "Import" > "Licenses...".
- 2 Select the license file(s) to be imported (*.xml) and click "Open".

5.8.4 View License Options

It is possible to view which license options that exist on a device.

- 1 Select the License tab.
- 2 Select a device.
- 3 In the bottom of the work area, the license options of the device are listed and whether the options are enabled or not.

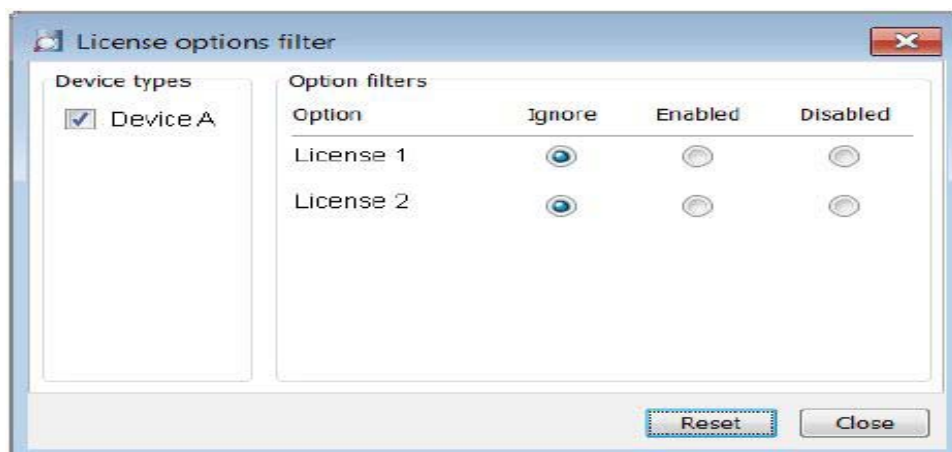
5.8.5 Filter License Options

It is possible to search and select devices which have same license options. The selected devices can be upgraded with additional licenses by exporting a product information file to the License Web (see Export Licensing Information on page 29). The advantage to select devices with same license options is that additional licenses can be applied for the devices simultaneously.

- 1 Select the License tab.
- 2 Click "Advanced find".

A License options filter dialog windows opens.

Figure 17. License Options Filter



- 3 Under Device types, select device(s).
- 4 Under Option filters, select the status of the license option(s) that shall be common for the selected devices.

- Ignore - show all devices independent of license options.
- Enabled - show devices with a certain license option enabled.
- Disabled - show devices with a certain license option disabled.

The search result is updated directly when selecting devices and license options. In addition, the icon is also displayed next to the Advanced find button to indicate that the search result is filtered.

When clicking Close, the filtered search result will still be displayed. When clicking Reset, the filter is removed and all devices are displayed.

5.8.6 Refresh

If a device is already registered in the WinPDM and a change of licenses has been done, the information needs to be updated. By doing a Refresh, the device license information in WinPDM is synchronized with the information in the license server and transferred to the device.

NOTE: This feature requires a connection to the license server.

- 1 Select the License tab.
- 2 Select device(s).
- 3 In the License menu, select "Refresh". The correct license is fetched from the license server, sent to the device and displayed in the Device Manager.

5.8.7 Remove Devices from the License View

This command removes devices from the licenses tab view.

- 1 Select the "Licenses" tab.
- 2 Select the device(s) that shall be removed from the list. The selected row(s) are highlighted.
- 3 In the License menu, select "Remove device". Alternatively, right-click the device and select "Remove device".
- 4 In the Remove device dialog, click "Yes".

5.8.8 Move License

NOTE: This feature requires WinPDM that supports the move license feature, and a connection to the license server.

TIP: See also the device's manual for more information on which device that support this feature.

If supported by the device, a license can be moved from one device to another device of the same device type. This feature can for example be used if your device is broken and you want to move the license to another device.

- 1 Select the "Licenses" tab.
- 2 Select the device whose license shall be moved. The selected row is highlighted.
- 3 In the License menu, select "Move license..." or right-click and select "Move license...". The Move license window appears.
- 4 Select the device that shall receive the license. Click "OK".
If no devices are shown in the Move license window, there are no devices that are selectable to move the license to.

The device type of the device that received the license is still unchanged in the WinPDM. Select this device and do the following:

In the Licenses menu, select "Refresh" to complete the transfer of the license. The device type of the device is now updated in WinPDM.

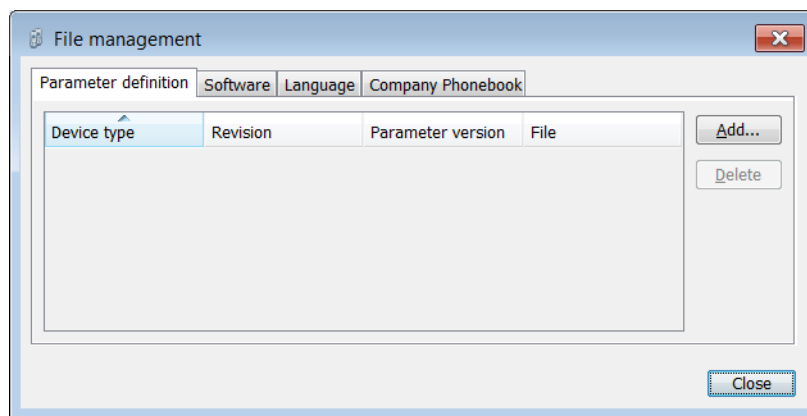
5.9 File Management

This chapter covers File management for parameter definition files, software files, language files (.lng) for devices, and company phonebook files.

Import and export of templates and numbers are described in [5.10 Import and Export of Numbers and Templates](#) on page 45. Import of language files (.xml) for the WinPDM menu are described in [5.1.5 Language Settings for WinPDM GUI](#) on page 24.

The parameter definition file holds the definitions of all parameters for a specific version of a Number's parameter set. Updated software and new parameter definition files for devices and Numbers can be added to the WinPDM, see [5.9.3 Import Parameter Definition Files](#) on page 43.

Figure 18. The File management window



5.9.1 Definition File Version – Parameter Version

Both definition files and device software include parameters and are indicated by a version number.

If a device associated to a Number is upgraded to a software supporting another parameter version than the stored Number, it does not always demand a new definition file. An old definition file can often be used, but if new parameters have been added in the new parameter version these parameters will not be editable. The release note will tell you if a new definition file is needed to match the new parameters. If the old definition file cannot be used, it will be highlighted with red.

5.9.2 Import a Package File

A package file may include different types of files, such as software files, parameter definition files and/or template files. If the package does not include a certain file, it can be imported separately. See [5.9.3 Import Parameter Definition Files](#) on page 43, [5.9.4 Import New Software Files for Devices](#) on page 43, and/or [5.10.3 Import Templates](#) on page 45.

- 1 From the **File** menu, select **File management**.
- 2 Select the **Parameter definition** tab or **Software** tab and click the **Add** button.
- 3 Select the package file (.pkg) to be imported and click the **Open** button.

The files included in the package are now imported.

5.9.3 Import Parameter Definition Files

TIP: Parameter definition files (.def) are mainly included in package files (.pkg) distributed by your supplier, see [5.9.2 Import a Package File](#) on page 42.

- 1 From the **File** menu, select **File management**.
- 2 Select the **Parameter definition** tab and click the **Add** button.
- 3 Select the definition file (.def) to be imported and click the **Open** button.
Only files with a corresponding extension are shown, such as .def and .pkg.

5.9.4 Import New Software Files for Devices

TIP: Software files (.bin) are mainly included in package files (.pkg) distributed by your supplier, see [5.9.2 Import a Package File](#) on page 42.

- 1 From the **File** menu, select **File management**.
- 2 Select the **Software** tab and click the **Add** button.
- 3 Select the software file to be imported and click the **Open** button.
Only files with a corresponding extension are shown, such as .bin and .pkg.

To apply the software for a device, continue with the instruction in [5.9.5 Upgrade a Device with New Software](#).

5.9.5 Upgrade a Device with New Software

It is possible to upgrade the software in a device. The device must be online/logged in to WinPDM.

- 1 Click the **Devices** tab.
- 2 Select the device which should be upgraded. It is possible to select several devices, but only devices of the same device type can be selected.
- 3 From the **Device** menu, select **Upgrade**.
- 4 In the **Available files** drop-down list, select the software to be uploaded.
NOTE: If the software is not available, you can import it by clicking the **Import** button.
- 5 Click the **OK** button.

The software will be downloaded to the device. A progress bar in the Status column for the device shows the progress of the download. The device will restart automatically after a successful download.

To cancel the upgrade, select **Device > Cancel upgrade**.

5.9.6 Import Language Files for Devices

NOTE: To select the language to be used in the WinPDM, see [5.1.5 Language Settings for WinPDM GUI](#) on page 24.

For adding a new language to a device, a language file (.lng) distributed by your supplier must be imported to the WinPDM and then uploaded to the device.

- 1 From the **File** menu, select **File management**.
- 2 Click the **Language** tab and then click the **Add** button.

- 3 Select the language files to be imported and click the **Open** button.

Only files with a corresponding extension are shown, such as .lng.

To apply the language for a device, continue with the instructions in [5.9.7 Upload a Language to Devices](#).

5.9.7 Upload a Language to Devices

It is possible to upload a language to devices that support this feature.

- 1 Click the **Devices** tab.
- 2 Select the device(s) to upload a language to. It is possible to select several devices, but only devices of the same device type can be selected.
- 3 From the **Device** menu, select **Upload Language**.
- 4 In the **Available files** drop-down list, select which language to upload.
NOTE: If your language is not available in the drop-down list, the language file (.lng) can be imported by clicking the **Import** button.
- 5 Click the **OK** button.

5.9.8 Import Company Phonebook Files

It is possible to import a company phonebook file for later use.

- 1 From the **File** menu, select **File management**.
- 2 Click the **Company Phonebook** tab and click the **Add** button.
- 3 Select the company phonebook files (.cpb) to be imported and click the **Open** button.

To upload the company phonebook to a device, continue with the instructions in [5.9.9 Upload a Company Phonebook](#).

5.9.9 Upload a Company Phonebook

It is possible to upload the company phonebook to a device that supports this feature. The company phonebook will appear in the device's Contacts list.

- 1 Click the **Devices** tab.
- 2 Select the device(s) to upload a company phonebook to. It is possible to select several devices, but only devices of the same device type can be selected.
- 3 From the **Device** menu, select **Upload company phonebook**.
- 4 In the **Available files** drop-down list, select which company phonebook to be uploaded.
NOTE: If your company phonebook is not available in the drop-down list, the company phonebook file (.cpb) can be imported by clicking the **Import** button.
- 5 Click the **OK** button.

5.9.10 Delete Imported Files for Devices

It is possible to delete parameter definition files, software files, language files (.lng) for devices, and company phonebook files.

- 1 From the **File** menu, select **File management**.
- 2 Select the applicable tab.

- 3 Select the file(s) to be deleted.
- 4 Click the **Delete** button.
- 5 In the **Delete files** window, click the **Yes** button.

5.10 Import and Export of Numbers and Templates

This section describes import and export of Numbers and templates.

- Import and additional file handling of parameter definition files, software files, language files and company phonebook files for devices are described in [5.9 File Management](#) on page 42.
- Import of language files for WinPDM are described in [5.1.5 Language Settings for WinPDM GUI](#) on page 24.

The purpose of exporting and importing Numbers and templates is to be able to move Numbers and templates to another site or to use at a later time.

The parameter configuration in Numbers can be exported to a file. This file can be used by the supplier to pre-program devices before delivery to the customer, and to share Numbers and templates with other PDMs.

5.10.1 Import Numbers

Updated Number files may be distributed by your supplier.

- 1 From the **File** menu, select **Import > Numbers**.
- 2 Select the Number file(s) to be imported (*.xcp) and click the **Open** button.

If there is a Number conflict when importing Numbers, the error message Number import failed: Number already exists is displayed.

5.10.2 Export Numbers to a File

It is possible to configure Numbers for a site and export the settings to a file. One or several Numbers can be selected. The exported file can then be used when producing new devices for the customer. Only Numbers stored in the database can be exported. There is no restriction on device type when exporting.

- 1 Click the **Numbers** tab.
- 2 Select the Number(s) to be exported
- 3 From the **Number** menu, select **Export**.
- 4 Enter a file name for the Numbers (.xcp) and where to save the file and click the **Save** button.

5.10.3 Import Templates

Updated template files may be distributed by your supplier.

- 1 From the **File** menu, select **Import > Templates**.
- 2 Select the template files to be imported (*.tpl) and click the **Open** button.

If there is a naming conflict when importing a template, the new template is imported and a digit within brackets is added after the name. The old template's name is not affected.

For example:

Template MyHandset (old template)

Template MyHandset (2) (new template)

5.10.4 Export Templates

It is possible to export template files. One or several templates can be exported.

- 1 Click the **Templates** tab.
- 2 Select the template (or templates) to be exported.
- 3 From the **Template** menu, select **Export**.
- 4 Enter a file name for the templates (.tpl) and where to save the file and click the **Save** button.

6. Administration

6.1 Data Backup

All settings in the WinPDM, such as the configuration, the sites and the templates are stored as database files. It is recommended to do backups on a regular basis. Device software, definition files, templates, devices and Numbers including parameters are included in the backup.

6.1.1 Backup WinPDM Database Files

- 1 Close the WinPDM.
- 2 The database files are saved in the **WinPDM** folder located in:
C:\USERS\<USER>\APPDATA\ROAMING\MITEL\
- 3 Copy the **WinPDM** folder to, for example, a network drive.

6.1.2 Restore WinPDM Database Files

- 1 Close the WinPDM.
- 2 Retrieve the saved copy of the **WinPDM** folder.
- 3 Copy the **WinPDM** folder to:
C:\USERS\<USER>\APPDATA\ROAMING\MITEL\

7. Uninstall the WinPDM

- 1 From the **Windows Start** menu, select your WinPDM application.
- 2 Select **Uninstall**. Follow the instructions in the wizard.

8. Troubleshooting

When troubleshooting the WinPDM, it is always a good idea to examine the log files, since they provide additional information that may prove useful. When reporting an error to your supplier, always include the appropriate log file.

Log files are stored under

C:\USERS\<USER>\APPDATA\ROAMING\MITEL\WinPDM\log

The log files are rotated every 10 MB and are time-stamped with 1 ms resolution.

Fault

Action or comment

The WinPDM does not start or installation fails

To run the WinPDM, the computer must confirm to the requirements listed in [7.2 Technical Specifications](#) on page 39. If you do not have the correct software versions installed, contact your system administrator.

To install the WinPDM, you must have administrator rights on the computer. Contact your system administrator if you are not able to install the WinPDM.

Firewall alerts appear every time WinPDM is started.

Windows Firewall may alert you of "PMServer" etc. You can ignore these security alerts, it will not affect the WinPDM, but then the alerts will appear every time the WinPDM is started. A better way is to select "Continue blocking" or "Unblock".

Connected device does not appear in WinPDM.

Make sure the device is properly connected, or try disconnecting and reconnecting the device.


Make sure that the USB port is configured correctly as follows:

- In Windows 7: Open **Windows Control Panel**. Select **System and Security > Hardware and Sound**. Under **Devices and Printers**, select **Device Manager**.

If the device does not show up in the list (as an USB port controlled device depending on the handset model), check the connection and reinstall the drivers and/or software for the device.

A device's software is not recognized/
synchronization fails

A device might have software with a parameter set that is newer than the version recognized by the WinPDM. The WinPDM will then be unable to send parameters to the device.

The symbol  in the **Status** column for the selected device indicates that the synchronization between the device and the WinPDM was not successful.

If this is the case, the WinPDM should be updated with new software and definition files provided by your local supplier. See [5.9.2 Import a Package File](#) on page 42.

Upgrade of a device's software fails
(aborted)

The device does not support the software version. Use another software version. Ask your supplier.

A Parameter conflict dialog window
appears

If a device is detected and the same Number has been used by another device in the system there will be a parameter conflict. A dialog window appears, asking the user to decide whether to use the Number settings in WinPDM or the Number settings in the device.

One typical situation when this parameter conflict will occur is if a device's hardware has been replaced.

For example:

A replacement device has first been registered with the same Number as the damaged device. When the replacement device is connected to the WinPDM, the WinPDM will warn for a parameter conflict.

In this case, select "WinPDM" to transfer the phonebook of the damaged device (located in WinPDM) to the new device. If "Device" is chosen in this situation, the phonebook belonging to the damaged device and located in WinPDM will be deleted (and replaced with the empty phonebook in the replacement device).

For more information about device replacement, see the User Manual or Configuration Manual for respective device.

Appendix A. WinPDM Keyboard Shortcuts

A.1 General

Shortcut	Description
Ctrl + H	Open the File management window.
Ctrl + Tab	Switch tab
Alt + F4	Close the application

A.2 Devices

Shortcut	Description
Ctrl + N	Add a new device
Enter	Upgrade the selected device(s)
Delete	Delete the selected device(s)
Ctrl + F	Find a device
Ctrl + Enter	Open the Properties window for the selected device

A.3 Numbers

Shortcut	Description
Ctrl + N	Add a new Number
Enter	Edit the selected Number
Ctrl + C	Copy the selected Number
F2	Rename the selected Number
Ctrl + S	Save the selected Number to the database
Delete	Delete the selected Number from the database
Ctrl + F	Find a Number

A.4 Templates

Shortcut	Description
Ctrl + N	Add a new template
Enter	Edit the selected template
Ctrl + C	Copy the selected template
F2	Rename the selected template
Delete	Delete the selected template
Ctrl + F	Find a template

Appendix B. File Types

In this appendix, the different file extensions that are used in WinPDM are explained. System files are not described.

File type	Extension	Description
Software file (devices)	bin	Software for devices
Company Phonebook file	cpb	Company Phonebook file for portable devices.
Parameter Definition file	def	Including all possible settings for a certain device type for a certain version.
Language file	lng, or xml	Language file for portable devices or WinPDM. Language file for WinPDM uses XML (eXtensible Markup Language.).
Package file	pkg	Archive that can include different file types such as parameter definition files (.def), software files (.bin) and template files (.tpl).
Site file	ste	Storage for site specific data. These files may not be edited manually.
Template file	tpl	Contains one or more exported templates.
Number file	xcp	Exported Numbers.
Product information file	xml	A file containing information needed for licensing and upgrade of a device.
License information file	xml	A file containing license keys for devices.

