A MITEL
PRODUCT
GUIDE

Unify OpenScape Xpressions

Client Applications

User Guide
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Mitel

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Contents

History of Changes

Date	Changes	Reason
2012-05-07	ACD features removed.	FRN 5712
2012-10-05	Added: Description of how to perform a “silent” MSP setup by adjusting the client setup.	CQ00218112
2012-12-04	Added: MSPTSP applications cannot normalize phone numbers depending on the invoking user.	NA10577796
2014-09-24	MSPTSP now supports 64-bit also.	CQ00313979
2018-08-28	complete update	UCBE-16957
2019-01-28	Removed chapters *CTI Clients for Telephone Operation* and *The Conference Extension for Microsoft Outlook and Lotus Notes*	UCBE-22377
2021-04-09	Added Note to 11.1 Connection of the OpenScape Xpressions Server to the Clients via the MSP	UCBE-26480

1 Unified Messaging with OpenScape Xpressions

1.1 Overview

OpenScape Xpressions is a mail server for unified messaging. OpenScape Xpressions integrates all mail services for voicemail, fax, e-mail and short messages (SMS). Only one non-service-specific mailbox is set up for every user and for all these services. This means, all messages are stored in one mailbox independent from the service they were sent by. Each user can be assigned a personal e-mail address and a personal fax number for receiving mails in this mailbox. His/her telephone number is a valid address, too, so that voice mails can be deposited in his/her mailbox.

You can access this mailbox via any networked PC or via any telephone at your workplace. The mailbox can be maintained from any telephone or any PC with internet access. Each subscriber can be informed about the arrival of a new message by a notification. Such notifications are possible

- on the workstation telephone, via the mailbox LED or as acoustic indication,
- on and arbitrary external telephone,
- on a cell phone by SMS, or
- via a pager.

The OpenScape Xpressions server can be used as a mailbox server or as a gateway to other mail systems. Connections to Microsoft Exchange Server or Lotus Notes are feasible as gateway server. If configured, all required conversions of different document formats take place on the OpenScape Xpressions server. This means that incoming messages of a particular service can be forwarded to other services if the data conversion process is feasible. The following data conversions are permitted, for example:

- Text-to-Speech (TTS)
- MS-Office documents (Word, Excel, PowerPoint) to fax
- Postscript to fax
- Fax to different graphics formats (JPG, TIF, BMP, DCX)

Separate service-specific addresses or numbers can be defined for every mailbox.

1.2 Differences Between E-Mail, Voice Mail and Fax Mail

All messages stored on the OpenScape Xpressions server are generally e-mails. Your e-mail client, therefore, displays all messages as e-mail messages. All voice or fax messages are provided as attachments to the e-mail. The purpose of the telephone access facility to your mailbox, however, is to distribute all messages according to the service. E-mail messages that only comprise an audio attachment are displayed as voice mails, and messages that only comprise an image attachment are displayed as fax messages. In special configurations you can extend the standard *Microsoft Outlook* features also for *Microsoft Outlook 2003*, *Microsoft Outlook 2007* or *Microsoft Outlook 2010* by installing special forms (see the *Microsoft Outlook Extensions* manual):

Via the forms it is possible to

- flag voice mails and fax messages in the Outlook journals by special symbols
- transmit fax, SMS and voice messages as well as poll fax messages (fax-on-demand)
- view or play and edit incoming fax and voice messages.

1.3 User Manual Client Applications

This document compiles and describes all client applications available for operating the communication functions provided by the OpenScape Xpressions server. Those client applications are dealt with in detail that, owing to their relatively small functional scope, are not subject of an individual manual. For all other client applications you find here a short function overview and a reference to the associated manual.

This manual supports you in using your mailbox, if you do not use any of the client programs shipped with OpenScape Xpressions by default for editing your mailbox. The operation of the programs used will be explained on the basis of the entry dialogs.

NOTE: Depending on the operating system (Windows 7 or Windows 10), the screen resolution and the PC configuration, the representation may slightly deviate.

It tells you:

- which settings you should make on your telephone/PBX (see Section 1.4, “Preparations on your Telephone and PBX”, on page 14).
- which clients are available for operating your mailbox.
- how to edit received messages on a PC.
  - at your workstation: see Section 2.8, “Microsoft Outlook in POP3 or IMAP Operation”, on page 29. The *Microsoft Outlook Extensions* manual describes how to operate the *Microsoft Outlook* extensions. The *Lotus Notes Extensions* manual describes how to operate the Notes Extensions.
  - at an arbitrarily networked PC: see Section 2.8, “Microsoft Outlook in POP3 or IMAP Operation”, on page 29.
- how to send e-mails: see Chapter 2, “Mailbox Editing on the PC and E-Mail Service”.
- which CTI clients are available for operating your telephone. See Chapter 3, “CTI Clients for Telephone Operation”.
- how to schedule, use and control voice and/or web conferences. See Chapter 4, “The Conference Extension for Microsoft Outlook and Lotus Notes”.
- how to send faxes: see Chapter 3, “Fax Mail Service”.
- how to send short messages (SMS): see Chapter 4, “Short Message Service”.
- which telephone user interfaces are available for editing your mailbox. See Chapter 6, “OutlookForms”.
- how to view respectively listen to fax and voicemails with OutlookForms, see Chapter 7, “Conversation Recorder”.
- how to record telephone calls, provided you have the corresponding user privilege: see Chapter 7, “Conversation Recorder”.
- how to use the Caller Guide to establish with this connection wizard an internal phone connection either voice- or entry-controlled: see Chapter 8, “Caller Guide”.
- how to use the MAPI fax printer driver for creating fax messages. See Chapter 10, “MAPI Fax Printer Driver”.
- the Service Provider (MSP) function. See Chapter 11, “Service Provider (MSP)”.
- the MSP TAPI Service Provider (MSPTSP) function. See Chapter 12, “MSP TAPI Service Provider (MSPTSP)”.

The following client applications are available for operating the OpenScape Xpressions server features:

OpenScape Xpressions Client	Manual Reference
Outlook Forms for sending fax, SMS and voice messages as well as for fax polling and editing incoming fax and voice messages.	See Section 2.1, “Microsoft Outlook in Exchange Operation”, on page 20. Operation is described in the *Microsoft Outlook Extensions* manual.
optiClient 130	See Section 3.2, “OpenScape Xpressions optiClient 130”, on page 38. The *optiClient 130* manual is available as user guide.
OpenScape web client	See Section 3.3, “OpenScape Web Client”, on page 40. The client's operation is described in the *OpenScape Web Client* manual.
Conference extension for *Microsoft Outlook* and *Lotus Notes*	See Section 4.1, “The Conference Extension”, on page 41. Operation is described in the manuals *Microsoft Outlook Extensions* or *Lotus Notes Extensions*.
Outlook Forms with connection to an SMTP server	See Section 2.2, “Microsoft Outlook at an SMTP Server”, on page 21. Operation is described in the *Microsoft Outlook Extensions* manual.
Lotus Notes Extensions	See Section 2.3, “Lotus Notes”, on page 22. Operation is described in the *Lotus Notes Extensions* manual.
Communications	See Section 2.4, “Communications”, on page 22. Operation is described in the *Communications* manual.
Web Assistant	See Section 2.5, “Web Assistant”, on page 23. Operation is described in the *Web Assistant* manual.
IP Phone Assistant	See Section 2.6, “OpenScape Xpressions IP Phone Assistant”, on page 23. How to operate this client application is described in the *IP Phone Assistant* manual.
Ergo	See Section 5.1, “Ergo”, on page 49. Operation is described in the *Ergo* manual.
Evo	See Section 5.2, “Evo”, on page 50. Operation is described in the *Evo* manual.
OpenScape Xpressions PhoneMail	See Section 5.3, “OpenScape Xpressions PhoneMail”, on page 53. Operation is described in the *OpenScape Xpressions PhoneMail* manual.
OpenScape Xpressions VMS	See Section 5.4, “OpenScape Xpressions VMS”, on page 54. Operation is described in the *OpenScape Xpressions VMS* manual.
Microsoft Outlook	See Section 2.8, “Microsoft Outlook in POP3 or IMAP Operation”, on page 29.
OutlookForms	See Chapter 6, “OutlookForms”.
Conversation Recorder	See Chapter 7, “Conversation Recorder”.
Caller Guide	See Chapter 8, “Caller Guide”.
MAPI Fax Printer Driver	See Chapter 10, “MAPI Fax Printer Driver”.

OpenScape Xpressions Client	Manual Reference
Service provider	See Chapter 11, “Service Provider (MSP)”.
TAPI Service Provider	See Chapter 12, “MSP TAPI Service Provider (MSPTSP)”.
Application Builder	See Chapter 13, “Application Builder”. The operation is described in the *Application Builder* manual.

1.4 Preparations on your Telephone and PBX

For the optimum use of your mailbox, set the call forwarding or CFNR function for the voice and fax services. Voice or fax calls to your extension will then be forwarded to your OpenScape Xpressions mailbox. Please refer to the operating instructions for your telephone or PBX for information on how to set up these functions. Your system administrator will tell you which numbers you must set as the call forwarding destination.

1.5 User-specific Data

This section provides you with an overview of all important user-specific or system-specific data. You will always have an overview of all important settings at hand if you note down all of the relevant data here. Your system administrator will give you the information you need.

1.5.1 Telephone System Data

Number for call forwarding, voice service = service access number for forward access	
Number for call forwarding, fax service	

1.5.2 Data for Telephone Access via Ergo

Dial individual mailbox = service access number for the control mode (direct access)	
Dial foreign mailbox = service access number for the answering machine mode (guest access) with message recording only.	
Dial foreign mailbox = service access number for the answering machine mode (guest access) with message assistant only.	
Service access number for the express mode	

1.5.3 Data for Telephone Access via Evo

Dial individual mailbox = service access number for the control mode (direct access)	
Dial foreign mailbox = service access number for the answering machine mode (guest access) with message recording only.	
Dial foreign mailbox = service access number for the answering machine mode (guest access) with message assistant only.	

1.5.4 Data for Telephone Access via PhoneMail

Dial own mailbox = service access number for direct access	
Dial external mailbox = service access number for guest access	
Service access number for callback access	
Service access number for universal access	

1.5.5 Data for Telephone Access via VMS

Dial own mailbox = service access number for direct access	
Dial external mailbox = service access number for guest access	
Service access number for callback access	
Service access number for universal access	

You can change your password for telephone access to the mailbox. You should not write down this password in the interests of security.

1.5.6 Data for PC Access

User name of the XPR subscriber	
E-mail address for the XPR mailbox	
XPR server name	
IP address of the XPR server	
Domain address of the XPR server	
Server name for the inbox/incoming mail (this can be identical to the domain address)	
Server name for the outbox/outgoing mail (this can be identical to the inbox)	
URL of the *Web Assistant*	
XPR address book URL for importing mail clients	

Furthermore, you need your password to access the PC. The system administration will tell you the password for the initial logon. After the initial logon, please immediately change this password, so that only you can log on to the system. In doing so, please heed the guidelines for passwords given by the system administration.
For your own interest you should never note down your password.

2 Mailbox Editing on the PC and E-Mail Service

This chapter describes the PC access to your OpenScape Xpressions mailbox. Using your PC, OpenScape Xpressions provides you with a uniform access interface to your voice messages, fax messages and e-mails.

You can generally use all e-mail clients that support an IMAP access. Though OpenScape Xpressions also masters the POP3 access, we do not recommend this access mode since it does not include mailbox synchronization when connected to the Lotus Domino or Microsoft Exchange server. PC access is described based on the following e-mail clients:

- *Microsoft Outlook* in Internet mail operation (see Section 2.8, “Microsoft Outlook in POP3 or IMAP Operation”, on page 29)

You can edit the OpenScape Xpressions mailbox also via the following client applications:

- *Microsoft Outlook 2007*, *Microsoft Outlook 2010, Microsoft Outlook 2013 and* Microsoft Outlook 2016 in connection with Microsoft Exchange Server (see the *Microsoft Outlook Extensions*) manual
- *Microsoft Outlook 2007*, *Microsoft Outlook 2010 Microsoft Outlook 2013 and Microsoft Outlook 2016* in connection with an SMTP server (see the *Microsoft Outlook Extensions*) manual
- *Lotus Notes* (see the *Lotus Notes Extensions* manual
- *Web Assistant* (see the *Web Assistant* manual)

NOTE: You can ask your system administrator for your personal OpenScape Xpressions user data that you require for mailbox editing on the PC.

2.1 *Microsoft Outlook* in Exchange Operation

For *Microsoft Outlook* in Exchange operation you can install *OpenScape Xpressions Outlook* extensions. The following *Microsoft Outlook* extensions are available:

- Icon Forms

  Via icon forms stored on the Exchange server, special icons are displayed in the Outlook message journals for the various message types (fax, voice mail etc.) instead of the default message icon (envelope).

- Message Forms

  Via message forms, received fax and voice mail messages can be viewed respectively played and edited in addition. Further forms serve for sending fax, voice mail and SMS messages and for fax-on-demand. You can use the following features via message forms:

  – Voice mail playback on the telephone

  – Voice mail playback via the PC sound system

  – Viewing and editing fax messages

  – Sending voice mails to arbitrary subscribers

  – Sending voice mails via a contact entry

  – Answering any message with a voice annotation

  – Sending voice mails via the Exchange address book

  – Answering/forwarding voice messages with voice comments

  – Sending SMS messages to any subscriber

  – Sending SMS messages to a contact

  – Sending SMS messages to the originator of a message

  – Sending SMS messages to a cell phone from the Exchange address book

  – Fax-on-demand

  – Sending a fax message to any subscriber

  – Sending a fax message to a contact

  – Sending a fax message to the originator of a message

  – Sending a fax message from the Exchange address book

  – Sending a fax message from Microsoft Office applications

  – Sending a fax message from Explorer

  - Answering/forwarding fax messages with annotations
  - Invocation of the Web Assistant
- The conference extension that offers the following options via the Outlook feature **Meeting Request**:
  - Scheduling and initiating telephone conferences
  - Scheduling and initiating web conferences
  - Scheduling and initiating combined telephone/web conferences
- OpenScape Xpressions optiClient 130

  The CTI client can be directly reached from Outlook and provides the following features:
  - Telephoning, conference, diverting etc.
  - logging calls
  - calling via Outlook entries
  - Calling via contact entries
  - identifying callers
  - call scheduling

For further information about the operation of the Outlook Extensions please refer to the user manual *Microsoft Outlook Extensions*. For information about OpenScape Xpressions optiClient 130 see Section 3.2, “OpenScape Xpressions optiClient 130”, on page 38.

2.2 *Microsoft Outlook* at an SMTP Server

Message forms, the conference extension and OpenScape Xpressions optiClient 130 are available for this operation mode also.

2.3 *Lotus Notes*

OpenScape Xpressions extensions can be installed for Lotus Notes as well. The *Lotus Notes* mail extensions are provided with the *Lotus Notes* e-mail client. If you open the e-mail client, you can use the selected mail extension.

- Fax (mail extension to send fax messages),
- Fax-on-demand (mail extension to poll fax messages),
- SMS (mail extension to send SMS messages),
- Voice (mail extension for sending voice messages)
- Voicemail annotation (mail extension for answering/forwarding a message with a voice comment)

You find further information on operating the *Lotus Notes* extensions in the *Lotus Notes Extensions* user manual.

2.4 *Communications*

The administrator of the OpenScape Xpressions server is provided with the functions for user administration and configuring the OpenScape Xpressions server.

The *Communications* client is comprehensively described in the *Communications* user manual.

2.5 *Web Assistant*

The *Web Assistant* is a convenient, browser-based application via which the OpenScape Xpressions system can be used, administered and configured.

By means of clearly structured HTML pages, all users of the OpenScape Xpressions system can create and administer messages of different types (e-mail, fax, SMS and voice messages).

Furthermore, users can access the personal parameters of the message services provided by the OpenScape Xpressions system and customize them according to their personal requirements.

Comprehensive options for system administration and configuration are available to the OpenScape Xpressions system administrator via the *Web Assistant*.

The *Web Assistant* is comprehensively described in the *Web Assistant* user manual.

2.6 *OpenScape Xpressions IP Phone Assistant*

The *IP Phone Assistant* is a web-based client application used via telephone. With the *IP Phone Assistant* you can retrieve respectively play text messages, voicemails and greetings, record new greetings, and send SMS messages. Operating the *IP Phone Assistant* and using its functionality requires either the **optiPoint application module** or an **OpenStage 60** respectively **80** as output device. How to operate this client application is described in the *IP Phone Assistant* manual.

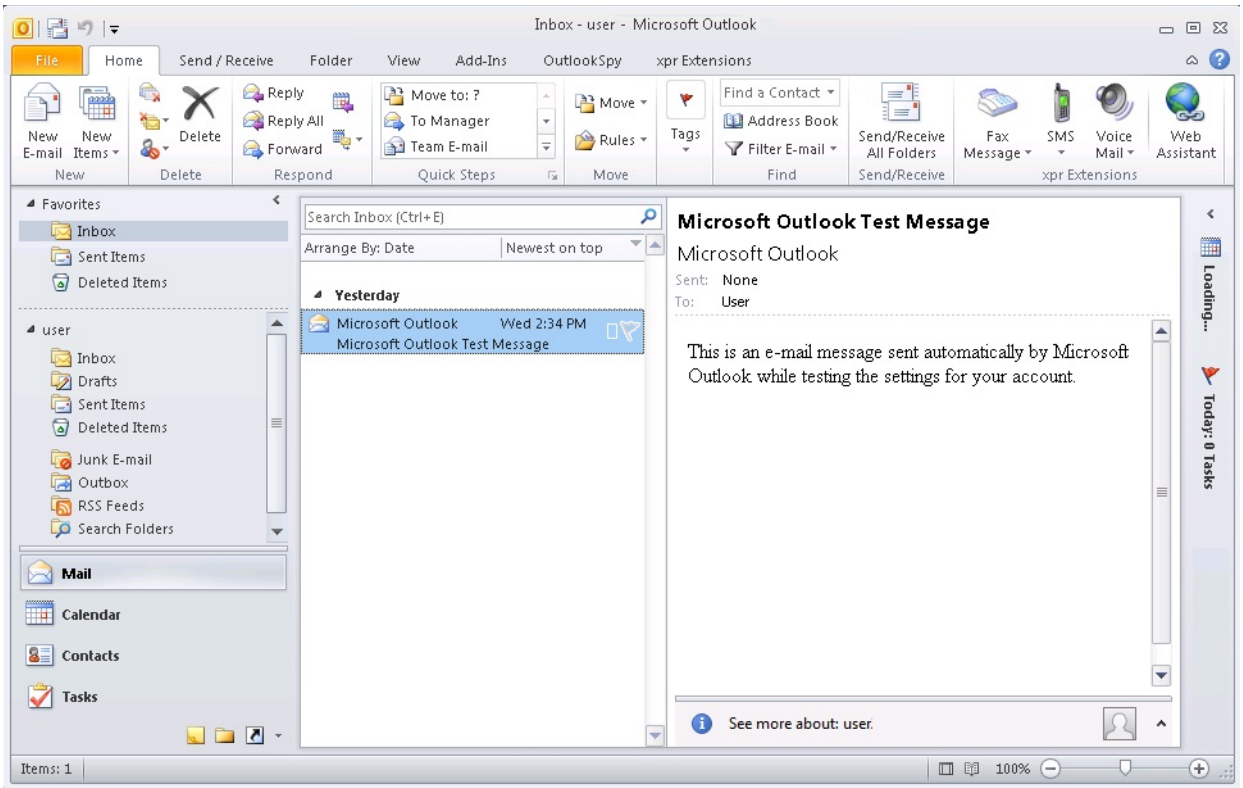
2.7 Microsoft Outlook connected to Microsoft Exchange server

The descriptions in this chapter are based on Microsoft Outlook 2007 or newer as an email client connected to Microsoft Exchange server.

2.7.1 System Requirements

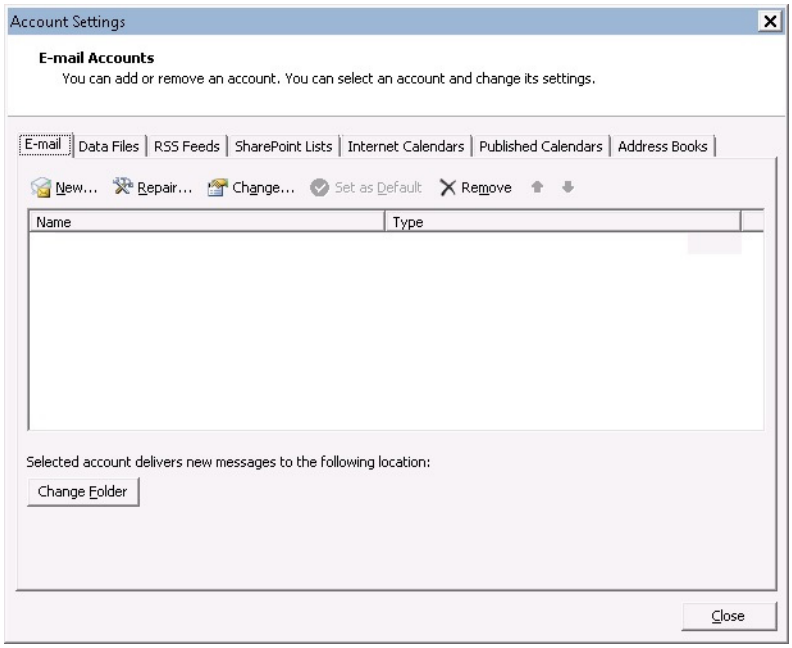
- Microsoft Outlook 2007, Microsoft Outlook 2010, Microsoft Outlook 2013 or Microsoft Outlook 2016
- Your PC must be equipped with a sound card, microphone, loudspeakers/ headset and appropriate playback software in order to allow voice message processing on your PC.
- The relevant graphics software must be installed on your PC in order to allow fax messages to be viewed. A graphics format that is supported by the user's graphics software can be set for each individual user.

2.7.2 Setting up an Account



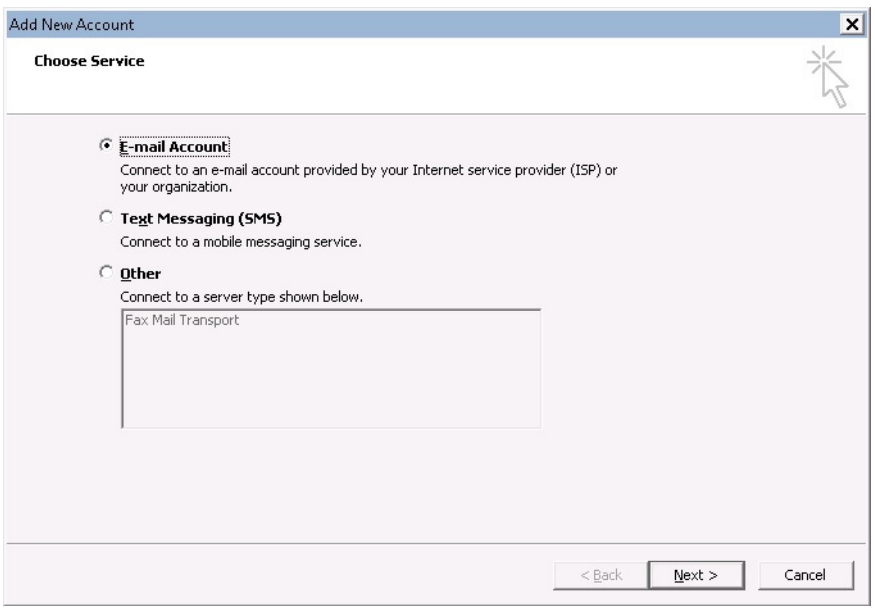
Start Microsoft Outlook and select **Account Settings ...** button in the **File - Info** menu.

Click **New ...** option in the Account Settings **E-mail** tab.

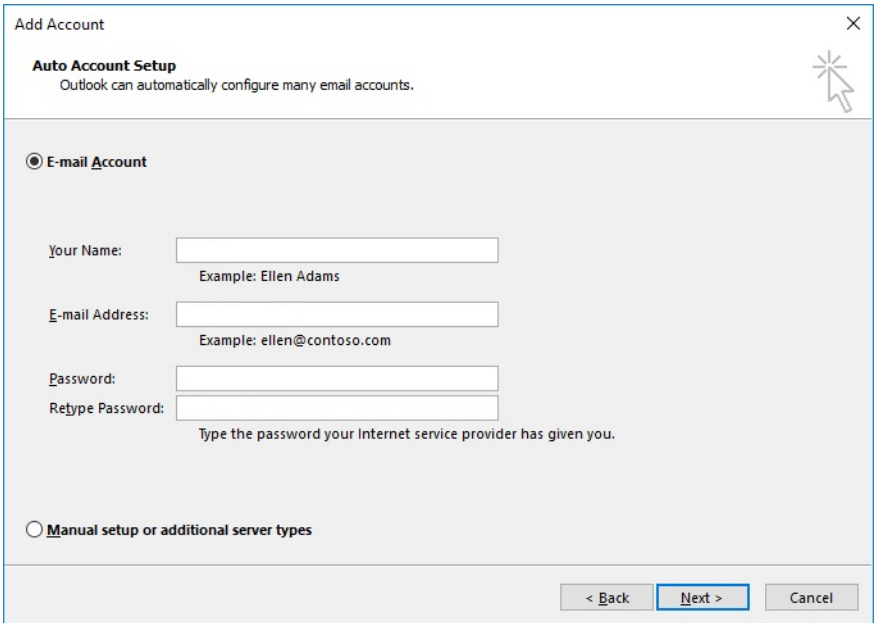


Select **E-mail Account** in the Add New Account window.

Click **Next**.

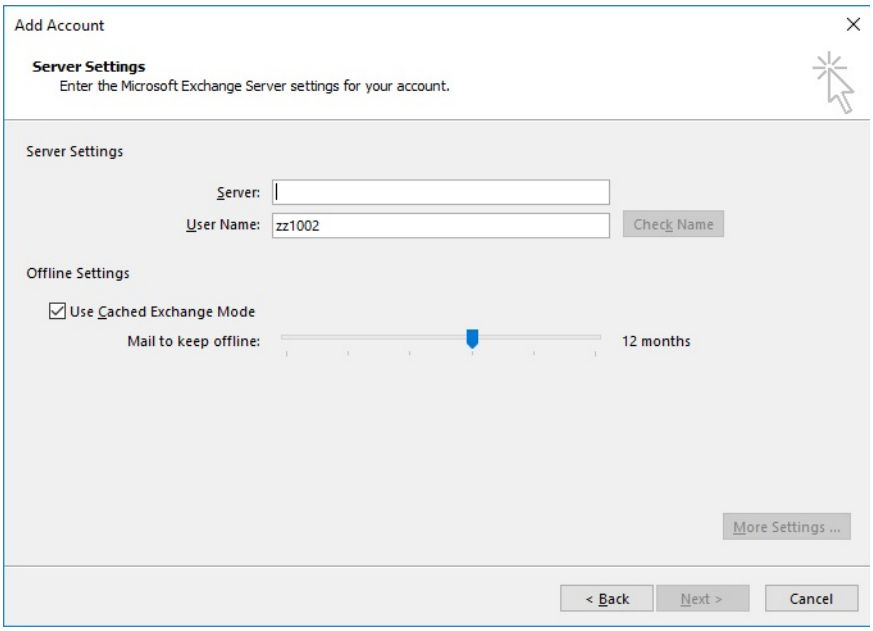


Enter your Exchange user data in the next window.

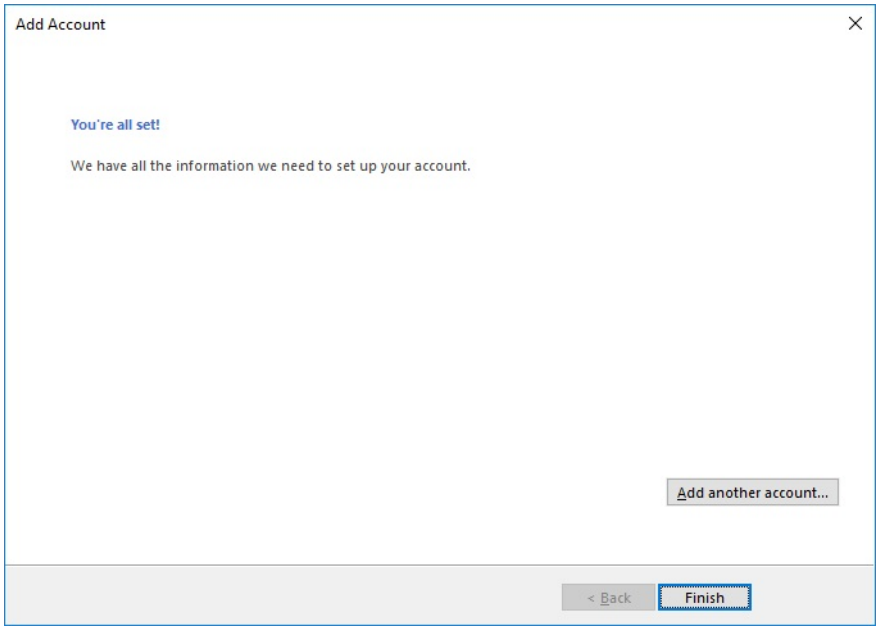


Enter your Microsoft Exchange server name and your domain user name.

Click **Next**.



And you are done.



The account for accessing your Microsoft Exchange mailbox is now set up.

Click on **Finish**.

After configuring the account you can access the directories **Inbox** and **Sent Items** in Microsoft Outlook under the account name.

NOTE: Depending on the language version of the installed mail server the names of the above folders may differ.

2.7.3 Receiving Messages

To Receive messages for the configured e-mail account, start Microsoft Outlook and switch to the inbox of your OpenScape Xpressions account.

All incoming messages are e-mail messages. You receive original voice and fax messages as additional data in the form of e-mail attachments.

An incoming voice message is attached to an e-mail as sound file. A player will be displayed in the message body and can be used to play the attached wave file.

An incoming fax message is attached to an e-mail as a tiff file. Microsoft Outlook displays tiff files directly in the message window.

2.7.4 Sending messages

All messages which you create and send using Microsoft Outlook are normal e-mail addresses The OpenScape Xpressions server can route your voicemail message, fax message or short message to a distribution list, fax device or cell phone using a special addressing procedure.

2.7.4.1 Routing Messages to OpenScape Xpressions Distribution Lists

The personal distribution lists defined using the *Web Assistant* and the public distribution lists provided by the system administrator can be entered as recipient addresses. For the correct addressing to a OpenScape Xpressions distribution list consult the *Web Assistant* manual.

2.7.4.2 Fax Message

All e-mail messages that you send via the OpenScape Xpressions server to fax address are received by the recipient as fax messages.

Please refer to Chapter 3, “Fax Mail Service” for information on the correct addressing of messages to fax addresses.

2.7.4.3 Routing Short Messages to a Cell Phone (SMS)

All e-mail messages which you send via the OpenScape Xpressions server to an SMS address are received by the recipient as short messages. Please refer to Section 4.2, “Sending short Messages” for information on the correct addressing of messages to SMS addresses.

2.8 *Microsoft Outlook* in POP3 or IMAP Operation

Deploying *Microsoft Outlook 2007*, *Microsoft Outlook 2010, Microsoft Outlook 2013 or Microsoft Outlook 2016* you can use internet mail operation via IMAP parallel to the Exchange connection.

2.8.1 System Requirements

- *Microsoft Outlook 2007, Microsoft Outlook 2010, Microsoft Outlook 2013* or *Microsoft Outlook 2016*.
- Your PC must be equipped with a sound card, microphone, loudspeakers/ headset and appropriate playback software to allow voice message processing on your PC.
- The relevant graphics software must be installed on your PC to allow fax messages to be viewed. A graphics format that is supported by the user's graphics software can be set for each individual user.

2.8.2 IMAP Operation Particularities

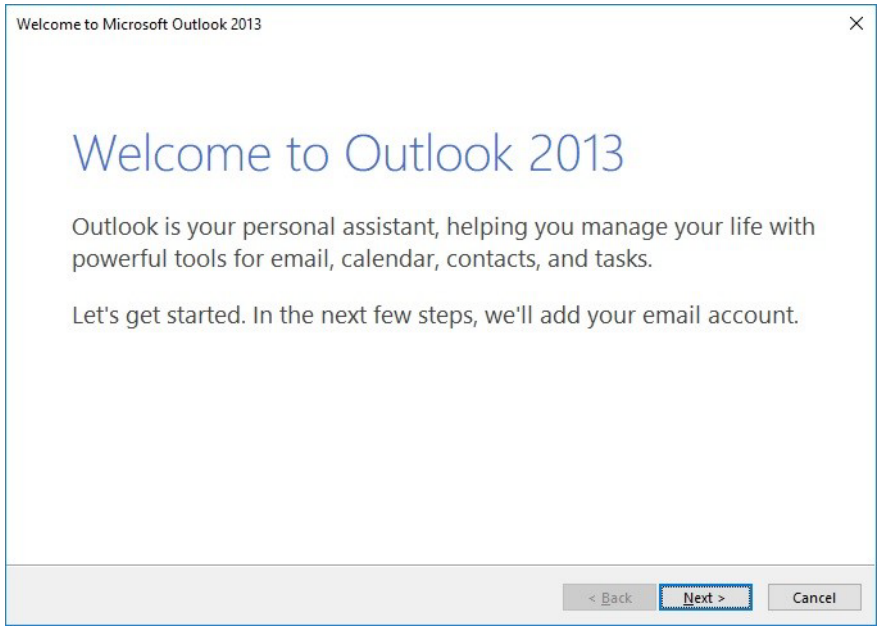
- If messages are deleted in the IMAP client, they are only marked as deleted. To remove a message for good, you need to execute the menu item **Edit > Purge Deleted Messages** in *Microsoft Outlook*.

2.8.3 Setting up an Account

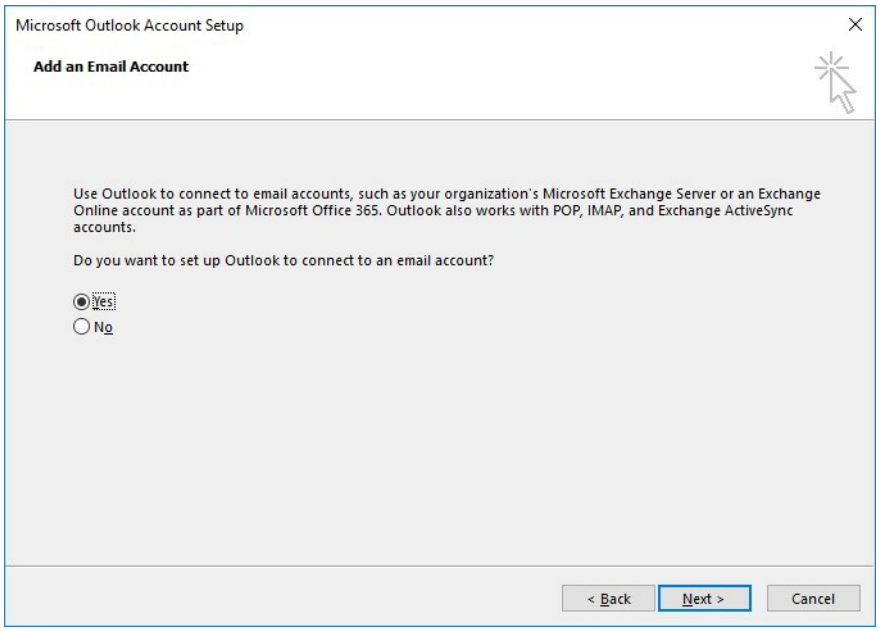
2.8.3.1 Starting *Microsoft Outlook* initially

When you start *Microsoft Outlook* after the installation for the first time, i.e. no Outlook profile has been created yet, execute the following steps to create a profile:

1. Invoke **Start > E-mail (Microsoft Office Outlook)** from the start menu. The start dialog for the Outlook configuration opens.



2. Click **Next** button, The E-mail Accounts dialog opens.

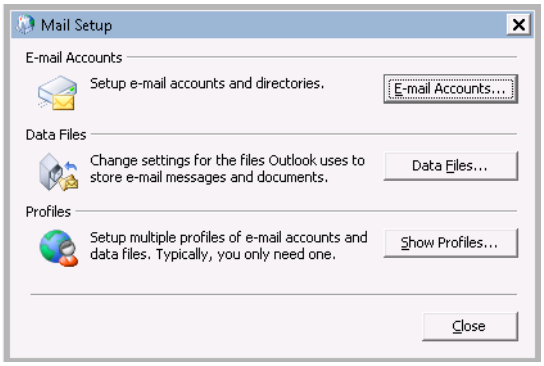


3. Select the **Yes** option here to set up an e-mail account. After a click on **Finish** the **Server Type** dialog opens. The description of the next configuration procedures is given from work step 5 in the following chapter.

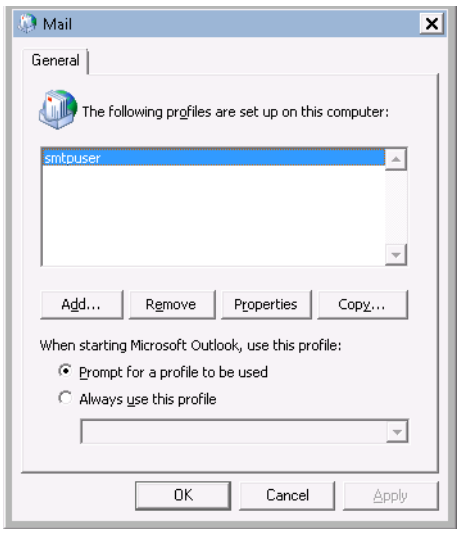
2.8.3.2 Configuring an additional Outlook Profile for the IMAP Operation

If you have already created an Outlook profile, for example to operate *Microsoft Outlook* at a *Microsoft Exchange Server*, proceed as follows to configure another profile for IMAP operation:

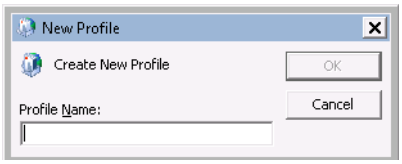
1. Go to **Control Panel > User Accounts > Mail**. The **Mail** Setup dialog opens.



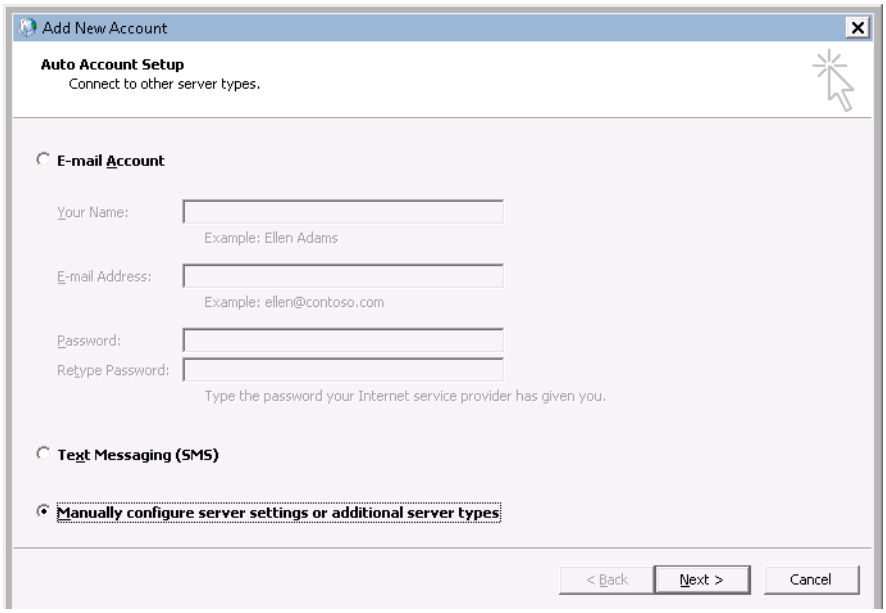
2. Click **Show Profiles**.



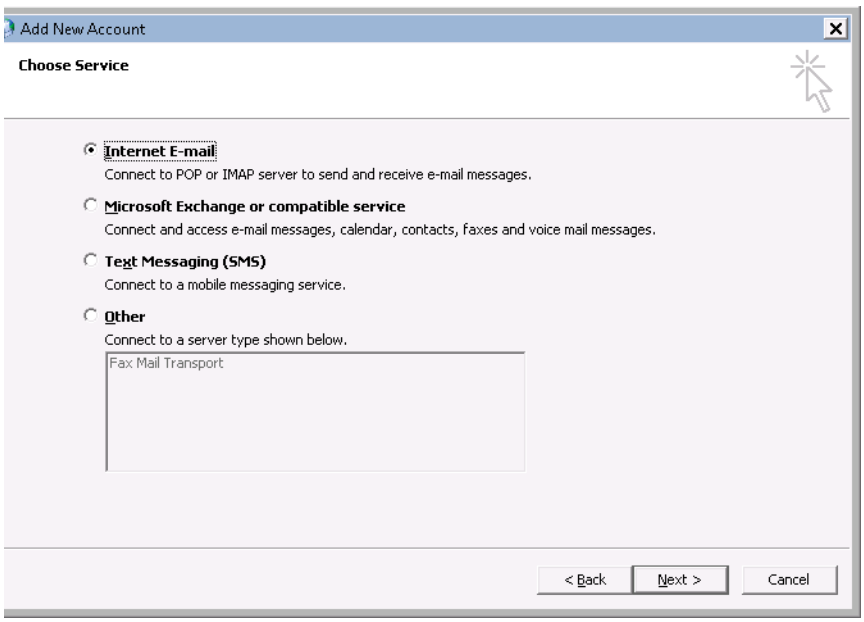
3. Select the **Prompt for a profile to be used** option here. This enables you to select a profile from the existing ones at each *Microsoft Outlook* start. Then click **Add...**. The **New Profile** dialog opens for you to enter the profile name.



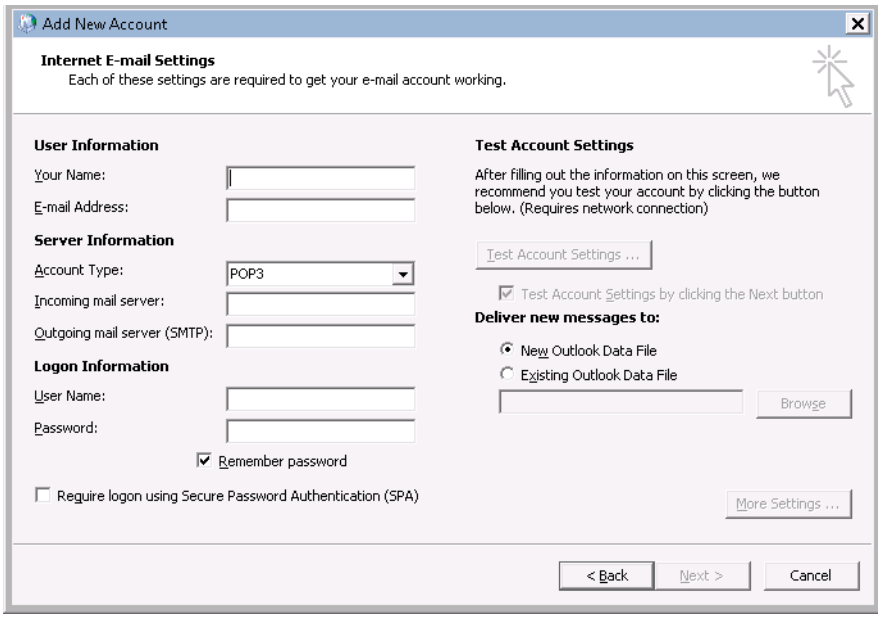
4. Assign a meaningful name to the IMAP profile so that you can quickly recognize it. Accomplish the name entry with **OK**. A wizard starts to support you in setting up and editing e-mail accounts.



5. In the **Add New Account** dialog select the “Manually configure server settings or additional server types” option and click on **Next**. The dialog for defining the server type opens.



6. In this dialog you define which server type you want to use for your e-mail account. Select the **Internet E-Mail** option here and click on **Next**. You are now taken to the configuration dialog for the e-mail settings.



7. In the **User Information** fields **Your Name** and **E-mail Address** specify your name and your OpenScape Xpressions e-mail address.

   In the **Server Information** portion enter the network address of the incoming-mail server (IMAP or POP3) and outgoing-mail server (SMTP). In our case, enter here the IP address of the OpenScape Xpressions server respectively. If you do not know this address, please consult your administrator.

   For the **Logon Information** enter under **User Name** the OpenScape Xpressions logon name (tantamount to the user recognition or user ID), and under **Password** enter your OpenScape Xpressions password. Via the **Remember password** option you can define whether or not a user needs to authenticate himself/herself by password entry at each *Microsoft Outlook* start. If you enable the option, thus save the password, Outlook will start without password query. After you have performed all settings, click **Next**.

8. A conclusive dialog confirms that you have made all required settings. Click **Finish** to configure the profile.

Profile configuration for IMAP or POP3 operation is thus complete.

2.8.4 Receiving Messages

To receive messages for the configured e-mail account, start *Microsoft Outlook* and switch to the inbox of your *OpenScape Xpressions* account.

All incoming messages are e-mail messages. You receive original voice and fax messages as additional data in the form of e-mail attachments.

An incoming voice message is attached to an e-mail as sound file. If you have entered a link for this file type (WAV), clicking the sound file starts the selected player and you can listen to your voicemail.

An incoming fax message is attached to an e-mail as a graphics file. If you are using graphics software that is linked to the file type of the attachment, the corresponding program is opened by clicking the attachment containing this file.

2.8.5 Sending Messages

All messages that you create and send via *Microsoft Outlook* are normal e-mails. The OpenScape Xpressions server can route your e-mail to a distribution list, your fax to a fax device or your short message to a cell phone using a special addressing procedure.

2.8.5.1 Routing Messages to OpenScape Xpressions Distribution Lists

The personal distribution lists defined using the *Web Assistant* and the public distribution lists provided by the system administrator can be entered as recipient addresses. For the correct addressing to a OpenScape Xpressions distribution list consult the *Web Assistant* manual.

2.8.5.2 Fax Message

All e-mail messages that you send via the OpenScape Xpressions server to a fax address are received by the recipient as fax messages.

Please refer to Chapter 3, “Fax Mail Service” for information on the correct addressing of messages to fax addresses.

2.8.5.3 Routing Short Messages to a Cell Phone (SMS)

All e-mail messages that you send via the OpenScape Xpressions server to an SMS address are received by the recipient as short messages. Please refer to Chapter 4, “Short Message Service” for information on the correct addressing of messages to SMS addresses.

3 Fax Mail Service

3.1 Overview

The following options are available to fax mail users in OpenScape Xpressions, depending on how the system is configured.

- You can send and receive fax messages on your workstation using the default e-mail client. When you receive the fax, it appears as attached graphics file (TIF or JPG file) in an e-mail.
- You can retrieve and output fax messages on the telephone. Fax messages can be output using
  a) a standard fax device,
  b) a standard printer,
  c) any fax machine.

3.1.1 Requirements for Sending a Fax

You can use the fax function via the OpenScape Xpressions server from any PC application that permits data to be directly sent to an e-mail recipient. This chapter exemplifies how to send files from the *Microsoft Windows Explorer* as fax via the OpenScape Xpressions server.

3.1.2 Requirements for Receiving a Fax

Please read Chapter 2, “Mailbox Editing on the PC and E-Mail Service” for information on receiving a fax with an e-mail client.

For fax message editing on the telephone either read the *PhoneMail, VMS, Ergo* or *Evo* manual depending on the installation.

3.1.3 Fax Stationery

Fax stationery consists of special fax send forms provided by your system administrator. On the fax stationery the text you wrote is automatically inserted in predefined sections.

Fax stationery may additionally contain graphic elements (e.g. a company logo, etc.). Moreover, it is possible to integrate wildcards for important send parameters (e.g. originator, recipient, send time, subject etc.) into the fax stationery. Sending the fax message sets such parameters automatically.

If your system administration has provided a set of fax stationery, you may specify which fax stationery to use for your fax messages via the *Web Assistant* (see *Web Assistant* manual) or via the fax send forms in *Microsoft Outlook*.

This feature works only if your internet e-mail address in your mail client is the same as the SMTP address of your OpenScape Xpressions mailbox and if the conversion of text to fax format is performed on the server.

3.1.4 Fax Display

Incoming faxes are saved in OpenScape Xpressions in an internal fax format. If you want to display incoming faxes using another mail client, you need to select a suitable conversion. Your system administrator configures one of the graphics formats listed below as the default conversion format on your system. This format is globally valid. An additional viewer software may be required if the mail client used cannot display this graphic format. You can have the system administrator set a different graphics format specially for your mailbox to facilitate access via IMAP or POP3. You should always try to convert all mailbox data to the same graphics format since this places the least demands on the system.

The conversion process supports the following graphics formats:

Format	Description
BMP	Windows bitmap
BMP_COL	Windows bitmap with trilinear grayscale interpolation
DCX	Multi-page PCX format (standard Microsoft fax format)
JPG	JPEG format with 9 grayscales
TIF	One-page compressed TIF fax format
TIF_BMP	Uncompressed TIF bitmap format
TG3	Multi-page compressed TIF fax format

3.2 Sending Fax Messages

For instructions on how to send Fax messages please check the following manuals:

- *OpenScape Xpressions V7, Microsoft Outlook Extensions*, User Guide
- *OpenScape Xpressions V7, IBM Notes Extensions*, User Guide

3.2.1 Using Fax-on-Demand Services

You can use fax-on-demand services in all e-mail clients. Send a blank e-mail to the following address:
`FAXG3REV/`*<fax-on-demand number>@<myserver.domain>*

This fax-on-demand number must be entered in international format. The OpenScape Xpressions server then retrieves the required fax pages for you and places them in your mailbox.

4 Short Message Service

The SMS protocol must be installed on the OpenScape Xpressions server to allow the functions described below. Please consult your system administrator if you have any queries.

4.1 Overview

Short Message Service (SMS) enables you to send short messages with a standard mail program to GSM network subscribers, thus to mobile phone users of supported mobile phone networks.

This service also allows implementing SMS scenarios, for example, gathering internet information and sending it as short message.

4.1.1 Application Options

To send SMS messages you can select any e-mail client that provides the facility to send e-mails via SMTP. Such clients are, for example, *Microsoft Outlook Express*, or the *Netscape Messenger* e-mail client, which is integrated in the *Netscape Communicator*. You can also use the SMS via *Microsoft Outlook* with *Microsoft Exchange*. You can then proceed as described here, or, with installed Exchange Connector, follow the descriptions in the *Microsoft Outlook Extensions* manual.

4.1.2 SMS for GSM Boxes

Short Message Service (SMS) for GSM (Global System for Mobile Communications) enables you to send short messages to GSM network subscribers with a standard mail program. In this transmission mode, one or several GSM boxes (also called GSM adapters) are connected to the OpenScape Xpressions server. These GSM boxes are special mobile phone devices construed for usage in server applications. Special cellphones with the corresponding data cable can be used as well. In this connection case the OpenScape Xpressions server behaves like a normal mobile phone subscriber.

- SMS for GSM sends via a cell phone device with corresponding board connected to the server.
- The SMS transmission can be so configured that merely the message subject is sent instead of the message body. Please consult your administrator on this.

- Reply messages from mobile phone subscribers are only supported in connection with specially defined variables fields in the SMS text. Please consult your administrator on this.
- An SMS message must not exceed 160 characters.

NOTE: Depending on the OpenScape Xpressions server configuration, fewer than 160 characters may be available for the actual text message. This depends on whether the SMS message is to be sent with additional text information. For example, the administrator may define that the originator name, a prefix or a suffix is automatically included in the SMS message. Prefixes are text information that with a transmission is automatically placed before the SMS message text, suffixes are attached to the SMS message text. Please consult your administrator on this.

Your system administration may configure the handling of messages that exceed 160 characters:

a) The message will not be sent

b) The first 160 characters will be sent only

c) The first line will be sent only

d) All lines until the first blank line will be sent

e) Combination of b) and c)

f) Combination of b) and d)

- Approximately 300 messages can be sent per hour for every connected transmitter.
- Umlauts and special characters from Western fonts are allowed in the messages. Some special characters may be transferred incorrectly, depending on the service center selected. Unicode SMS, which would be required for Greek, Cyrillic or other fonts, is not supported.
- Network operators normally store SMS messages for 48 hours, if the cell phone user cannot be reached. Within these 48 hours the send process is repeated in specific intervals.

NOTE: There is no guarantee that an SMS message will reach the recipient. The provider may send a positive receipt signal even if the recipient number does not exist.

4.1.3 SMS via direct Provider Coupling

SMS message transmission via direct provider coupling is the most complete type of connection because it exploits all originator and recipient options. In addition, this connection type offers high performance, security and favorable prices. The OpenScape Xpressions server and provider are connected via the TCP/IP protocol. Additional security can be provided by configuring a VPN tunnel between the customer and provider.

- SMS via direct provider coupling sends directly to the provider via the TCP/IP protocol.
- An SMS message must not exceed 612 characters.

NOTE: Depending on the OpenScape Xpressions server configuration, fewer than 612 characters may be available for the actual text message. This depends on whether the SMS message is to be sent with additional text information. For example, the administrator may define that the originator name, a prefix or a suffix is automatically included in the SMS message. Prefixes are text information that with a transmission is automatically placed before the SMS message text, suffixes are attached to the SMS message text. Please consult your administrator on this.

Your system administration may configure the handling of messages that exceed 160 respectively 612 characters: One of eight different operating modes can be defaulted:

a) The message will not be sent

b) An SMS message with up to 612 characters is divided among up to four SMS messages. If the SMS message contains more than 612 characters it will not be sent.

c) An SMS message with up to 612 characters is divided among up to four SMS messages and sent as one. If the SMS message contains more than 612 characters it will not be sent. Based on these submessages a modern cellphone can display a single message again.

d) One big SMS message with up to 612 characters is sent. This function must be supported by the provider. If the SMS message contains more than 612 characters it will not be sent.

e) Only the first 160 characters of an SMS message are sent. Further characters are omitted (compatibility mode). This mode is activated, for example, if both SMS send modes are available.

f) The first 612 characters of an SMS message are divided among up to four SMS messages. Further characters will be omitted.

g) The first 612 characters of an SMS message are divided among up to four SMS messages and sent as one. Further characters will be omitted. Based on these submessages a modern cellphone can display a single message again.

h) This first 612 characters of an SMS message are sent in one big SMS message. This function must be supported by the provider. Further characters will be omitted.

- Approximately 30000 messages can be sent per hour for every connected transmitter.
- Umlauts and special characters from Western fonts are allowed in the messages. Some special characters may be transferred incorrectly, depending on the service center selected. Unicode SMS, which would be required for Greek, Cyrillic or other fonts, is not supported.
- Network operators normally store SMS messages for 48 hours, if the cell phone user cannot be reached. Within these 48 hours the send process is repeated in specific intervals.
- Your system administrator can default the following delivery notification settings:

Settings	Remark
None	Do not request delivery notifications from the provider for sent messages.
Default	It is up to the provider which notification types are used for sent messages.
Special	Here the administrator can define that for the following delivery states information will be transmitted: **Delivery Notification**: The provider sends reports if the SMS message has been successfully transmitted. **Failed Notification**: The provider sends reports if the transmission of an SMS message has failed. **Buffered Notification**: The provider sends reports if SMS messages are buffered because e.g. a recipient is currently not available. The process will then be repeated within a specific time frame.

4.1.4 GSM Box Features and direct Provider Coupling

The following table lists the features of both SMS connections, GSM box and direct provider coupling (SMS IP). Depending on the installed version, this needs to be considered for individual SMS transmission.

Send SMS

Feature	Comment	GSM box	SMS IP
Sending		✓	✓
Extra long SMS messages	Up to 612 characters.	✗	✓
Special characters	Depending on the receiving cellphone and provider.	✓	✓
Euro sign	Depending on the receiving cellphone and provider.	✗	✓
Performance	Depending on the provider.	300 SMS messages per hour	30000 SMS messages per hour
Extended message tracking	The additional send reports: sent, saved, not saved.	✗	✓
Adaptable originator recognition	If supported, then depending on the provider and contract.	✗	✓

SMS message receiving

Feature	Comment	GSM box	SMS IP
Editing		✓	✓
Extra long SMS messages	Up to 612 characters.	✗	✓
Special characters	Depending on the sending cellphone and provider.	✓	✓
Euro sign	Depending on the sending cellphone and provider.	✗	✓
Addressing via calling number		✗	✓
Addressing via token in the message text		✓	✓
Receiving via fixed calling number		✓	✓

Feature	Comment	GSM box	SMS IP
Receiving via speed dialing code		✗	✓
Receiving as VSMSC		✗	✓

4.2 Sending short Messages

For instructions on how to send SMS messages please check the following manuals:

- *OpenScape Xpressions V7, Microsoft Outlook Extensions*, User Guide
- *OpenScape Xpressions V7, IBM Notes Extensions*, User Guide

4.3 Receiving SMS Messages

SMS messages received without special recipient ID in the message text are forwarded to the **Postmaster**.

Direct SMS message transmissions to a specific subscriber can be configured in the SMS message text via a coded recipient specification. The administrator defines which special characters identify this entry, and which recipient information is used for the assignment. The recipient ID can be placed in an arbitrary position within the SMS message body The ID within the SMS message body corresponds, for instance, to one of the following patterns:

<message text><recipient>**#**<message text>*

*<message text>**<**<recipient>**>**<message text>*

Examples:

*1234#Hello Mr Mayer, ...

<Lisa User>Hello Mr Mayer, ...

The administrator will tell you which information to fill in for the *<recipient>* variable and which separators to use.

NOTE: If the automatic transmission of the user name with each SMS message sent is configured, this text information can also be used for inbound routing. The recipient of the SMS message only needs to copy this information, placed between the separators, to his/her reply, and delivery occurs automatically.

4.4 Tips for Everyday Use

4.4.1 Sending a Callback Number

You can enter the number under which you can be reached in a separate line in the SMS message. Example:

```
Hello Martin, Stephen here. Please call me at the following
number: 089722123456
```

A number is automatically selected when you scroll a message almost any mobile phone. This number can be dialed directly when you push the talk key.

4.4.2 Sending SMS Messages from Intranet Pages

If you are working in an intranet environment providing WWW pages for other users, you can create hyperlinks in these pages that allow users to send SMS messages directly to cell phone users in the supported networks. A sample HTML link is provided below:

```
<a href="mailto:SMS/436647654321@myserver.domain">
SMS to Martin's cell phone</a>
```

The addressing after `mailto:` is the same as the direct address entry in an Internet e-mail software (see Section 4.2, “Sending short Messages”, on page 46).

You can also use the addressing in WWW server applications such as CGI scripts.

5 OpenScape Xpressions Voice Mail Systems

5.1 *Ergo*

Ergo is the name of a voicemail system. *Ergo* represents, like other voicemail systems, access to the OpenScape Xpressions server via telephone. It allows users in an Integrated Messaging (IM) or True Unified Messaging (TUM) environment to access their mailbox and also to perform a multitude of settings by means of telephone keys. Moreover, the system is not bound to a specific type of PBX. Thus Ergo is the user interface via which the mailbox content is put out and mailbox functions are administered per telephone. Mailbox is the term for the data directory in which all incoming messages, be it an e-mail, a fax or voice mail are stored for processing at a later date. With reference to the manifold configuration options provided by *Ergo*, the system, as its name already suggests, enables Ergonomic operation of all functions as far as possible.

Ergo can be used in different operating modes. These operating modes vary in the available functions:

- The standard mode
  It offers the basic Ergo features and hides all functions that are used only occasionally.
- The enhanced mode
  Provides all main menu functions. The user can toggle between standard and enhanced mode at will.
- The extended mode
  The extended mode must be implemented by the administrator. This operating mode provides further detailed settings and is intended for users who operate their mailbox exclusively by telephone, thus, who do not have a workstation PC for performing settings.

In the standard mode you can...

- ...edit newly incoming messages or those you have already played.
- ...record new voice mails and send them.
- ...be directly connected to another subscriber or to the operator.
- ...perform the fast editing of the day greeting.
- ...modify your mailbox option settings. In the standard mode for example: record a welcome greeting, record your name, toggle to the enhanced mode, etc.

In the enhanced mode you can use the following features in addition to the standard mode functions:

- Recording up to nine greetings
- Defining three trusted numbers, etc.
- Modifying your message options. Among these are...
  - ...the installation of the notification function (informs about the arrival of new messages). This includes the definition of a cellphone number as address for the notification and specifying the type of message the notification is to apply to,
  - ...the configuration of additional specific message options. These are: switching the sorting order or filtering in the mailbox, and allowing messages with attributes such as “urgent” or “confidential”.

The extended mode enables further detailed mailbox option settings:

- Settings for greetings to be played during business hours (daytime mode),
- Settings for greetings to be played out of business hours (nighttime mode),
- Definition of the associated time settings,
- Testing the complete settings.

You find detailed information on the *Ergo* features and operation in the *Ergo manual.*

5.2 *Evo*

Evo (Extended Voice Operation) is the name of the new voice-operated voice mail system. Similar to other voice mail systems, this system provides access to the OpenScape Xpressions server via telephone. Contrary to the existing voice mail systems, which are operated via telephone keys, the functions are activated by user voice entries in *Evo*. I.e. all actions a user wants to perform for operating and configuring his/her mailbox are realized via spoken commands. The speech recognition system allows users in an Integrated Messaging (IM) or True Unified Messaging (TUM) environment to access their mailbox and also to perform a multitude of configuration settings.

NOTE: *The administrator configuration of Evo* can provide the user in each menu branch with the key operation option in addition to voice control. This may be required e.g. if the automatic speech recognition does not guarantee sufficient recognition because of external factors (temporary construction noise, impairment of the user's audibility etc.).

5.2.1 Voice Control

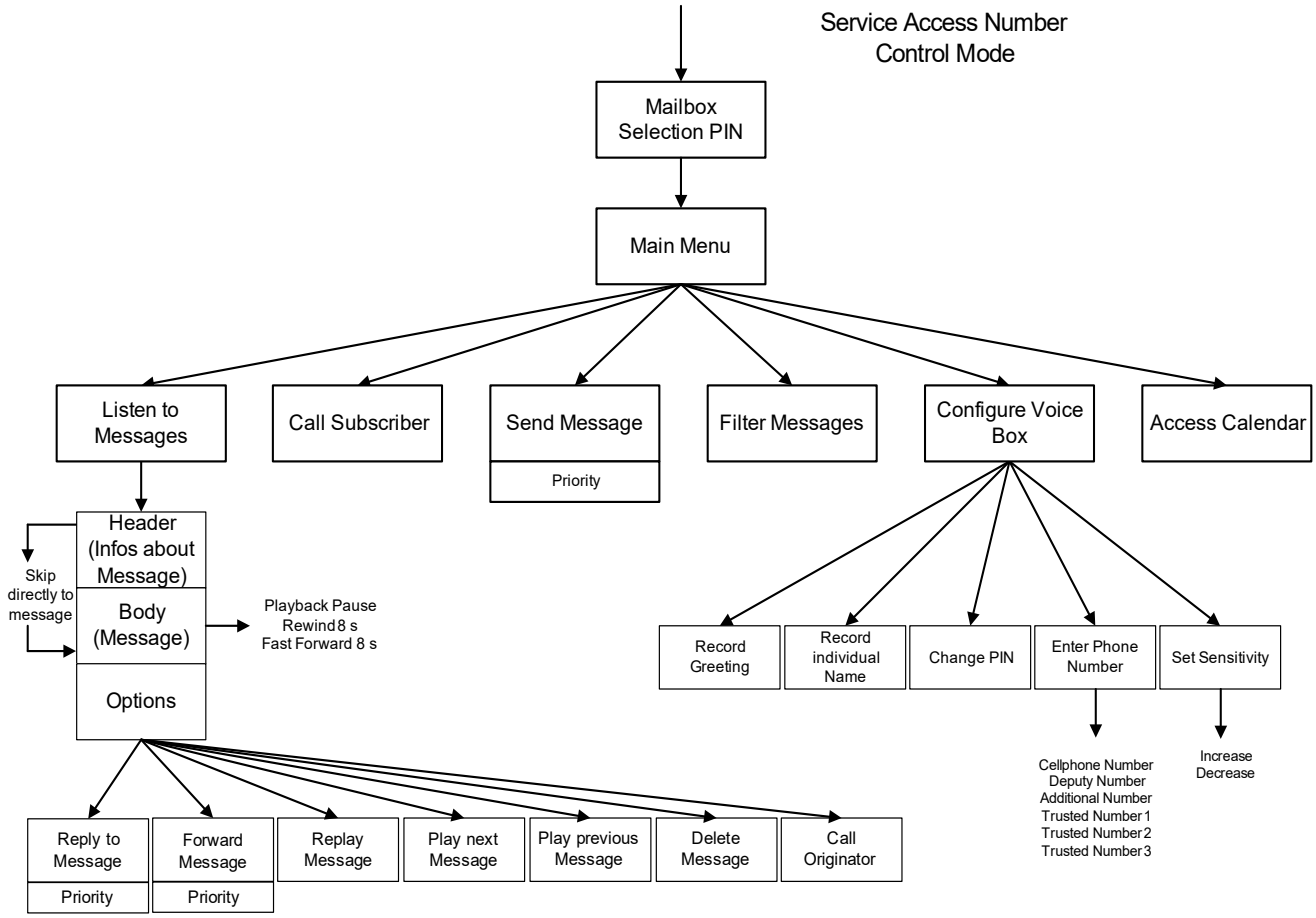
Voice-operated usage is possible because of a highly efficient speech recognition software. This is characterized by a significantly increased recognition rate. Speech recognition works according to the following principle: the voice command that has been entered is converted into an electric signal. Subsequently this signal is compared to generated signals of different text strings that are stored in so-called grammar files. From this, the system calculates a percent value (e.g.85 %) that determines as recognition threshold whether the match is sufficient to provoke the command or not. If this value is above the recognition threshold defined as minimum level, the command is executed. If the value is below it, the system prompts you to repeat your entry. For a fluent workflow it is absolutely necessary that the user articulates the commands clearly.

5.2.2 Mailbox editing by Telephone with *Evo*

In principle *Evo* thus is the user interface via which the mailbox content is put out, mailbox functions are administered by telephone and telephone connections are established. Mailbox is the term for the data directory in which all incoming messages, such as e-mail, fax or voicemails are stored for processing at a later date. *Evo* provides the following features:

- Editing newly incoming messages or those you have already played.
- Recording new messages and sending them.
- Being directly connected to another subscriber or to the operator.
- Modifying your mailbox options.

5.2.3 The Evo Menu Structure



You find detailed information on the *Evo* features and operation in the *Evo* manual.

5.3 *OpenScape Xpressions PhoneMail*

OpenScape Xpressions PhoneMail is a software-based voice mail system that can be operated as stand-alone voice mail system, also allowing mailbox access in a Unified Messaging environment. In this way it is possible to manage all messages delivered to the OpenScape Xpressions mailbox almost exclusively by telephone instead of via a client application (*Web Assistant*, *Microsoft Outlook*, *Lotus Notes*, *Communications* etc.).

You can:

- Edit all messages that were delivered to your own mailbox. For example, play voice mails, print out fax messages, and have e-mails read out, or answer and forward these messages.
- Record voice mails and send them.
- Configure send options for voice mails.
- Set the personal reply options: creating greetings, defining deputies and configuring call diversions, etc.
- Be directly connected to other subscribers.
- Edit your personal mailbox settings

5.3.1 Mailbox Editing by Telephone with *PhoneMail*

With *PhoneMail* you manage your mailbox via telephone.

PhoneMail enables you to retrieve and administer messages such as voice mails, faxes or e-mails. Furthermore, you can record voice mails for other users and subsequently send these messages. You can also directly address the mailbox of another subscriber to leave a message for this subscriber. You can divert callers to your mailbox and enable them to leave voice mails there (answering machine function), or play a personal greeting to them (infobox mode). Various special functions, such as the direct connection to the originator of an incoming message, are also included in the scope of features.

All OpenScape Xpressions users have their own mailbox on the OpenScape Xpressions server. With *PhoneMail* you can access a mailbox via any telephone. This means that you can use an internal telephone connected to your organization's PBX as well as an external telephone, connected to your organization's PBX via a trunk code, to access your mailbox.

You find detailed information on the *OpenScape Xpressions PhoneMail* features and operation in the *PhoneMail manual.*

5.4 *OpenScape Xpressions VMS*

OpenScape Xpressions VMS is a software-based voice mail system that can be operated as stand-alone voice mail system, also allowing mailbox access in a Unified Messaging environment. In this way it is possible to manage all messages delivered to the OpenScape Xpressions mailbox almost exclusively by telephone instead of via a client application (*Web Assistant*, *Microsoft Outlook*, *Lotus Notes*, etc.). You can:

- Edit all messages that were delivered to your own mailbox. For example, play voice mails, print out fax messages, and have e-mails read out, or answer and forward these messages.
- Record and send voice mails (also by broadcast).
- Record dictations and send them.
- Set the personal mailbox options (special functions): creating greetings, defining deputies and configuring call diversions, etc.
- Modify you answering machine settings by fast access.
- Be directly connected to other subscribers.

5.4.1 Mailbox Editing by Telephone with *VMS*

With *VMS* you operate and manage your mailbox via telephone.

VMS enables you to retrieve and administer messages such as voice mails, faxes or e-mails. Furthermore, you can record voice mails for other users and subsequently send these messages. In addition, you have the option of directly addressing the mailbox of another subscriber to leave a message for this subscriber. You can divert callers to your mailbox and enable them to leave messages there (answering machine function), or play a personal greeting to them (infobox mode). Various special functions such as direct connection to the originator of an incoming message are also included in the scope of functions. *VMS* also allows you to record and edit dictations and to broadcast messages.

All OpenScape Xpressions users have their own mailbox on the OpenScape Xpressions server. This means that you can use an internal telephone connected to your organization's PBX as well as an external telephone, connected to your organization's PBX via a trunk code, to access your mailbox with *VMS*.

You find detailed information on the *OpenScape Xpressions VMS* features and operation in the *VMS manual.*

5.5 *OpenScape Xpressions PhoneMail* and *OpenScape Xpressions VMS*

PhoneMail and *VMS* can be used in parallel.

5.5.1 Differences in Functionality and Operation between *PhoneMail* and *VMS*

The table below summarizes the differences in functionality and operation between *PhoneMail* and *VMS*. It should aid you in deciding which voice mail system to use for which purpose. In addition, it highlights the differences in operation.

Task	VMS	PhoneMail
Station authentication for direct access/mailbox playback	by means of code number (=Hicom PIN) and password (PIN)	by means of phone number and password (PIN) / password (PIN)
Password optional	X	-
Exit from address entries	* (star)	# (pound)
Return to main menu from all branches	0*	-
Send broadcast	X	-
Create dictation (privilege required)	X	-
Access to sent objects	X	-
Job processing	job-oriented	session-oriented
Help function	-	X
Quick reference	-	X
Using general greetings	X	-
Sequence when sending messages	addressing, then recording message	recording message, then addressing
Variable forward access	-	X

6 OutlookForms

6.1 General Information

The OutlookForms is an Outlook Add-in for sending Voice, Fax and SMS messages, playing voice mails and viewing fax messages.

The OutlookForms enables the following functions:

Automatically mount the OpenScape Xpressions address syntax for Voice, Fax and SMS forms.

1. For “Fax” messages

- Opening files of the formats Fax G3/G4 TIF.
- View adaption (enlarging, turning, browsing in multipage fax messages, widening to the current window size and full-page preview).
- Commenting fax messages. This means insertion of images or text. In this way a fax can be furnished with remarks before being forwarded or replied to, or a fax form can be filled in.
- Automatically mount the OpenScape Xpressions address syntax.

2. For “Voice” messages

- Opening WAV files.
- Playing WAV files (either via sound card or telephone)
- Attaching a voice comment to the WAV file (either via sound card or telephone) and saving the result on the computer.

3. For SMS

- Special form with character counters.

The OutlookForms is connected to the XPR server and via the XPR Service Provider (MSP). The service provider is the global substructure for all XPR client applications that use XPR server services. A user profile is required for the OutlookForms to access the XPR database via the service provider. User profile generation can occur automatically via the Windows user account, provided your administrator has configured the XPR server accordingly. Otherwise a user profile must be defined manually. Consult your administrator on this.

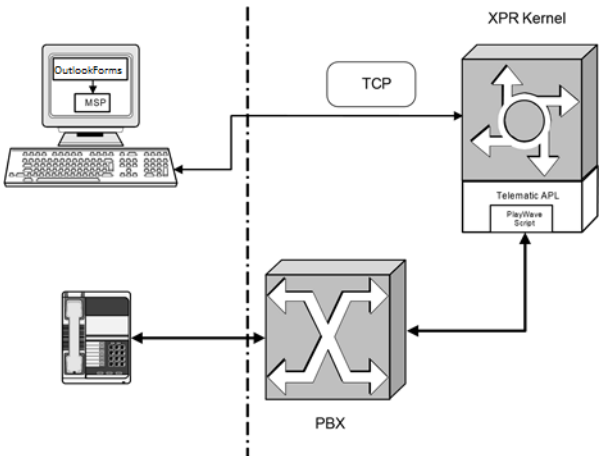
6.2 Who should read this chapter

This chapter is intended for OutlookForms users as well as for system administrators. Here the user finds OutlookForms operating instructions, and the administrator will be guided along the correct installation of this client program.

6.3 System Requirements

- Please refer to the *Release Notice* to check which Microsoft Outlook versions have been released for the OutlookForms installation.
- The OutlookForms requires a Telematic APL with installed PlayWave protocol. This protocol is already implemented in the default installation.

The following overview shows the integration of the OutlookForms in the system environment.



6.4 Installation

Please refer to the *OpenScape Xpressions Client Installation* Manual for OutlookForms installation process.

NOTE: The OpenScape Xpressions service provider will be automatically installed in the course of the OutlookForms installation in case the provider has not been installed on the client computer yet.

6.5 Operation

For instructions on how to use OutlookForms please check *OpenScape Xpressions V7 Microsoft Outlook Extensions*, User Guide.

7 Conversation Recorder

The installation of the *Conversation Recorder* telematic protocol enables users to record telephone conversation. From the technical point of view, a conference switch is initiated via the *Conversation Recorder*, and the *Converstion Recorder* is switched to an existing call connection as another terminal device. When you activate the recording, the participating conversational partners are informed by a greeting that the conversation is being recorded. After the conversation the recording is automatically transmitted as voice mail to the mailbox of the user who has initiated it.

IMPORTANT: We expressly point out that conversation recording by means of a recording function requires the explicit consent of all persons taking part in the conversation. Otherwise, this may constitute a violation of the data protection act of the country in which this function is used. Therefore, before you use the recording function, obtain legal advice about the corresponding rules and regulations valid in the country in which the recording function is to be used.
We recommend to document the consent of the conversational partners given on the use of the recording function.

7.1 Operation

How to operate the *Conversation Recorder*:

1. You are conducting a conversation that you want to record.
2. Initiate a consultation.
3. Dial the phone number assigned to the Conversation Recorder.

   All participants in the conversation now hear a message that informs them that the conversation will be recorded and recording is started.
4. Recording is stopped when

   a) the conversation or the teleconference is finished.

   b) one of the subscribers taking part in the conversation or in the teleconference presses an arbitrary DTMF key on his/her telephone.

   c) the maximum recording duration set by the administrator has been reached.

   The recording is then automatically delivered as voice mail to the user who called the *Conversation Recorder* by consultation.

8 *Caller Guide*

8.1 What is the *Caller Guide*?

The *Caller Guide* is a switching assistant preferably operated by voice. With the *Caller Guide* you can search for contacts in the OpenScape Xpressions database and immediately set up a connection to the OpenScape Xpressions user found.

A few standardized commands and an efficient speech recognition system allow to operate the Caller Guide easily via voice entries. But you can also easily use telephone keys for search entries and to control the *Caller Guide*. The usage is simplified because of the search hit list that is issued by prompts or the telephone display.

There are five options for the connection setup targets:

- Call tracking for individually configured tracking phone numbers of the OpenScape Xpressions user.
- Connecting to the voice mailbox of the OpenScape Xpressions user you want to find.
- Connecting to the workstation's phone number of the OpenScape Xpressions user you want to find.
- Forwarding the call to an operator.
- Finally: identification of fax messages and forwarding to the selected contact.

NOTE: This chapter contains exclusively the operator guidance of the *Caller Guide*. Administrators who wish to install, set and configure the *Caller Guide* protocol should consult the corresponding section of the Telematic APL chapter in the *Server Administration* manual.

8.2 Voice-activated Dialing and Telephone Keys

Operator guidance by means of the *Caller Guide* is principally possible in two ways:

- Via speech entries.
- Via your telephone keys.

The *Caller Guide* has been designed to allow usage of both versions in one search process.

8.2.1 Voice Entries

Voice-operated usage is possible because of a highly efficient speech recognition software. Speech recognition works according to the following principle: the voice command that has been entered is converted into an electric signal. Afterwards, this signal is compared to previously generated signals of different text strings that are stored in so-called grammar files. From this, the system calculates a value in percent (e.g. 85 %) that defines whether the match is sufficient for triggering the command or not in comparison with the configured recognition threshold. If this value is above the recognition threshold that has been defined as the minimum threshold, the command will be executed as recognized. If the value is below the threshold, the system asks you to confirm the result that has been recognized. In order to work smoothly it is absolutely necessary for you to say your commands very clearly.

The menu prompts simplify triggering the commands, as the name that is searched for or the respective commands are played for each step of the contact search. Keywords (voice commands) to trigger an action ensure that the *Caller Guide* can correctly recognize and execute the desired function. Furthermore, entering names and commands via voice makes working with the *Caller Guide* much faster.

For instance, you can control with your voice the security prompt asking whether a connection shall be established to a search hit. Here you are prompted to complete your action with "*Yes*". By saying "*No*", no connection is established and you will automatically return to the menu branch where you started your search.

As mentioned above, working efficiently with the *Caller Guide* is only possible if you say your commands clearly. Therefore you should avoid using the *Caller Guide* in environments with noisy disturbances. These might lead to misinterpretations by the recognition software. The same applies for the "hands-free" telephone mode for which the output via loudspeaker is again recognized as input.

8.2.2 Input via Telephone Keys

In addition to speech recognition, the *Caller Guide* script offers the option to use telephone keys for menu navigation. This can be required e.g. if the automatic speech recognition does not guarantee sufficient recognition quality for speech entries because of external factors (noise, impairment of the user's audibility etc).

Pushing a key starts the name dialing mode. It is also possible to say "*Name*" before the search and change explicitly to the name dialing mode for the contact search.

For a search via telephone keys each letter of a name or term that you wish to find is entered via one telephone key. For the letters"A", B" and "C" push key "2", for the letters "D", "E" and "F" push "3" etc.

Each entry refines the search process. Thus a unique search hit can be early detected and a hit list will be displayed for selection. Consequently, it is not necessary to enter the search term completely. This shortens the search times.

8.3 Tracking Phone Numbers and Personal Announcements

Tracking phone numbers are phone numbers the *Caller Guide* dials for setting up a connection to an OpenScape Xpressions user. A total of five phone numbers or deputies can be defined in a list. The individual list entries are dialed one after another until a connection can be established or until the complete list has been processed.

IMPORTANT: If the administrator set the **Blind Transfer** feature during the *Caller Guide* configuration, only the **first** list entry of the tracking phone numbers is dialed. The remaining list entries can be filled in the *Web Assistant*, but are not considered by the system after the activation of Blind Transfer.
Blind Transfer describes the forwarding of calls though the availability of the receiving target has not been checked.

The tracking phone number configuration and the recording of personal greetings is effected via the *Web Assistant*. You configure the phone numbers via the menu option **Voice Mail System** of the **Personal settings** menu.

NOTE: If calls are redirected from the office telephone to the *Caller Guide*, the defined tracking phone numbers stay active.

Instead of using the name announcements created automatically by the TTS system for the individual OpenScape Xpressions users, each OpenScape Xpressions user can create their own announcement. The names of the OpenScape Xpressions users are played as result after each search.

The announcements are recorded via the menu option **Announcements** in the **Personal settings** menu and add these to the **user data**.

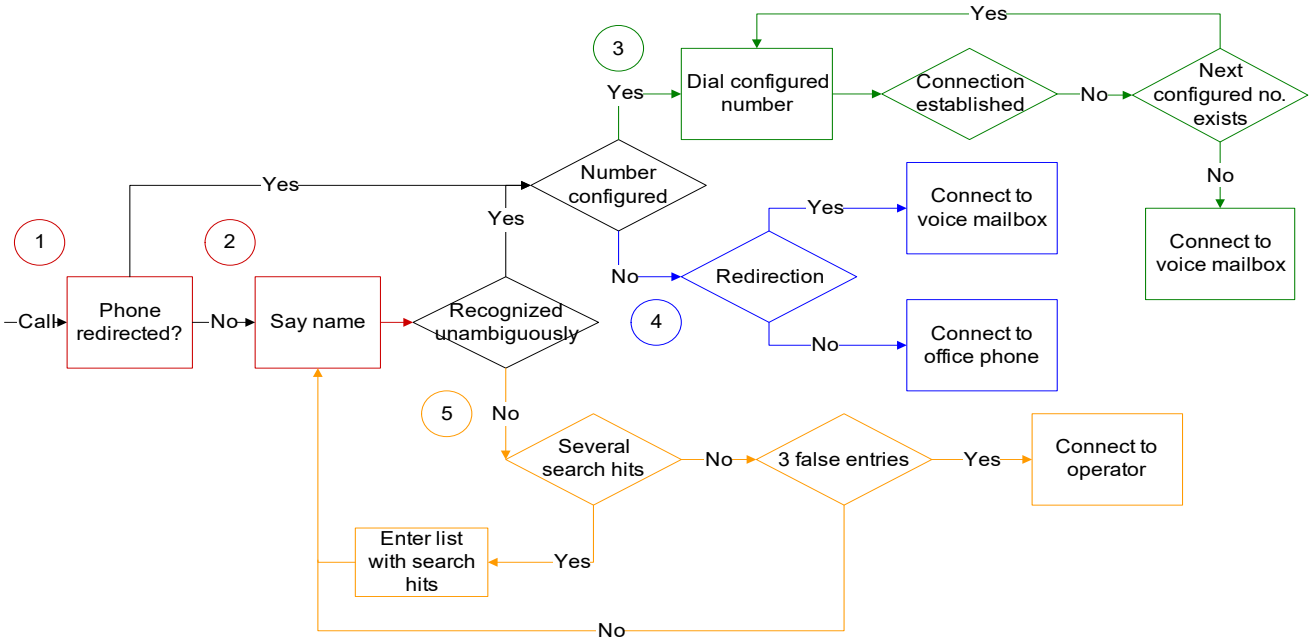
NOTE: For a detailed description of the personal user parameters of the *Caller Guide* please refer to the *Web Assistant*.

8.4 Operation

8.4.1 Basics for the *Caller Guide* Operation

After you have established a connection to the *Caller Guide*, announcements will guide you through the single connection steps. Thus you will have feedback on each operating step you have effected for a better control of your actions.

The following illustration demonstrates the possible steps and processes of the *Caller Guide*. The numbering in the illustration corresponds to the numbering of the enumeration of the single steps.



1. A redirection of the office telephone to the *Caller Guide* will be recognized and the owner of the originally called telephone is immediately accepted as uniquely identified.
2. Search a contact you would like to find by using either voice-activated dialing or telephone keys. The OpenScape Xpressions database is searched with your search entry and returns the search hits.
3. If a unique hit is found or if you select an entry from the hit list, a connection to the first configured number of the contact will be established. If it is not possible to set up a connection to this configured number, the next configured number will be dialed until a connection can be set up successfully or finally a connection to the voice mailbox of the contact is established.

4. Two different cases can be distinguished:

   a) If the called telephone is redirected to the *Caller Guide*, the *Caller Guide* recognizes this redirection and the owner of this telephone is immediately accepted as identified. If he/she has configured a number, the system tries to contact him/her immediately via this number. Otherwise you will be connected to his/her voice mailbox.

   b) If no configured numbers of the identified contact exist and if the office phone is not redirected to the *Caller Guide*, you will be connected to the office phone.

5. If no OpenScape Xpressions user is found or if the number of search hits is too large, you have to restart your search or select an entry from a list in case several search hits were issued. After three unsuccessful search attempts you will be connected to the operator.

The next paragraphs contain a detailed description of the single steps you will need to perform.

8.4.2 Basic Features

8.4.2.1 Repeating System Announcements

If you do not trigger any of the features that have been announced in a menu, that is if you neither make a voice entry nor push a key, the announcement will be repeated in a more detailed way. To hear a prompt again, simply wait until it is repeated. This is useful, for example, if you did not hear the announcement properly.

If no entry has been made after three repetitions of the announcement, you will be automatically connected to an automatic operator.

8.4.2.2 Requesting Help

If you do not know how to continue in a menu, you can say the voice command "***Help***" and an announcement will explain the menu options. The help prompts always refer to the menu branch you are currently in. These extended help prompts will then inform you about the selections you can currently make in the menu.

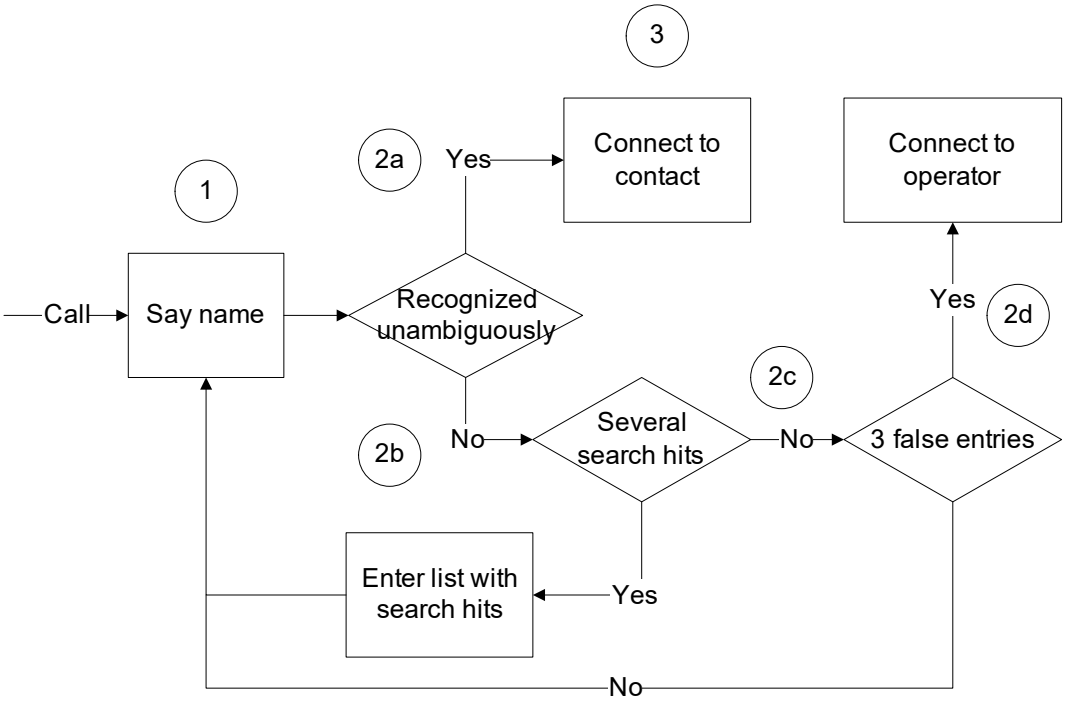
8.4.2.3 Ending a Connection

You can terminate the connection to the *Caller Guide* any time by simply hanging up the receiver of your telephone.

8.4.3 Finding and selecting a Contact

8.4.3.1 Search via voice-activated Dialing

The following illustration demonstrates the possible steps and processes of the *Caller Guide*. The numbering in the illustration corresponds to the numbering of the enumeration of the single steps.



NOTE: Please make sure to say the names and commands clearly when you use voice-activated dialing. If a contact cannot be found, the reason could not only be that he/she is not in the directory, but it could also be that your pronunciation for the search has not been exact enough.

1. At first the *Caller Guide* starts with a welcome greeting when you call. You are asked to enter the contact you would like to find via voice-activated dialing. Say the name of the contact you are looking for clearly. The required order of first name and last name is explained in the announcement, since this order may vary due to the administrator settings. In both cases you can also only say the last name, but the recognition probability will then decrease.

2. The search hit(s) will now be shown in your telephone display or a prompt will be played informing you that no contact could be found.

   a) **Unique match:** A unique search hit is announced and shown in the telephone display. If the recognition value is above the threshold that has been configured, you will be connected automatically. If it is below the threshold, you first have to confirm the result that has been recognized. If you would like to be connected to the match that is displayed, say the command “Yes” or push the * key. You will return to the greeting and to the search by saying the command “No” or by pushing the # key.

   b) **Several matches:** If several matches have been found for your search entry, you have to select one contact. Select the respective key for a list entry. The order in the list corresponds to the keys of the numbers 1 up to a maximum of 5.
   If more than five matches have been found, the following options are announced:

      – You can be connected to the operator

      – You can repeat your entry in a more detailed way.

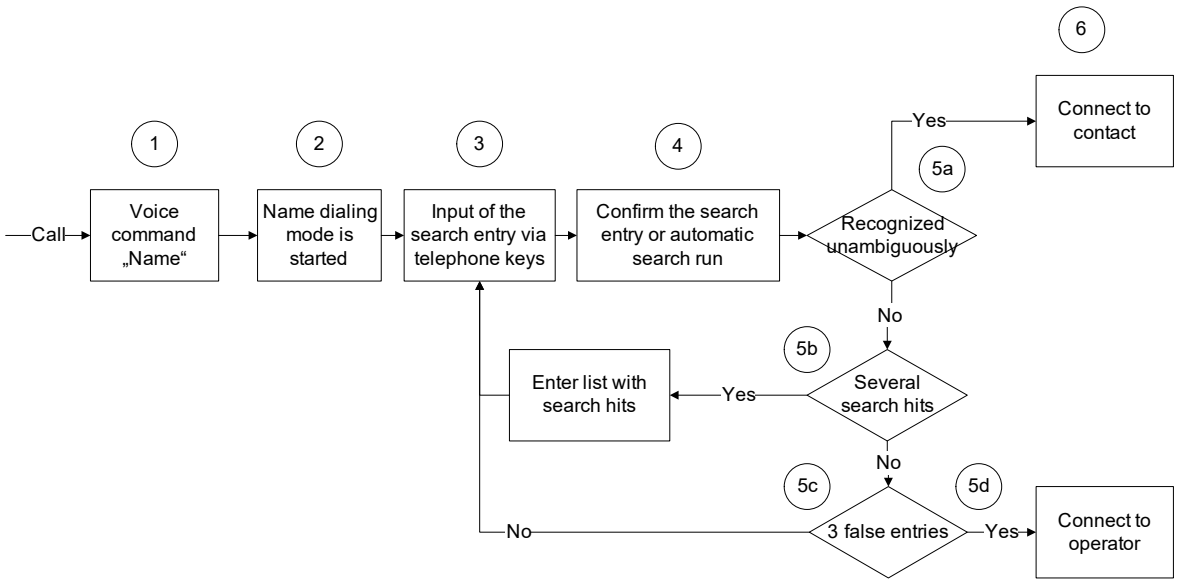
   c) **No match:** If no match could be found for your search, return to the search and thus to 1.).

   d) **Operator:** It is possible to search for a contact three times. After the third failed search you will be connected to the operator.

3. You will receive an announcement confirming that you are connected to the selected contact.

8.4.3.2 Search via the Telephone Keys

The following illustration demonstrates the possible steps and processes of the *Caller Guide*. The numbering in the illustration corresponds to the numbering of the enumeration of the single steps.



1. At first the *Caller Guide* starts with a welcome greeting when you call.
2. If you would like to look for the desired contact via the telephone keys, either say clearly “*Name*” or simply push the first key of the contact's name. The name dialing mode to search for a contact via the telephone keys will then be started.
3. Enter the name of the contact you would like to find via the telephone keys. Three or four letters are assigned to each telephone key. Push the respective telephone key for every single letter of the name you are looking for. However, push each key only once for each letter. For instance, push the key “1” for the letters “A”, “B” or “C” *once* and *not* twice for B or three times for C. The umlauts “ä”, “ü” and “ö” as well as “ß” become “ae”, “ue”, “oe” and “ss”. For the name “Müller” e.g. push the key sequence “6835537”.

1	**2** ABC	**3** DEF
4 GHI	**5** JKL	**6** MNO
7 PQRS	**8** TUV	**9** WXYZ
*****	**0**	**#**

4. After each input of a digit an automatic search is started after a short time of delay. For instance, after the input “2” all entries starting with “A”, “B” and “C” are searched for and may be issued (if the maximum number of entries in the hit list is not exceeded). If the contact that has been searched for is already displayed in this hit list, you can stop entering additional digits and instead start to establish a connection to the selected search hit.

   NOTE: You do not need to enter the complete name of the contact you are looking for. Entering only a few letters already enables the search for a contact. The administrator determines the minimum number of letters that must be entered for the search. By default, the search requires two letters. However, the number of letters that have been entered increases the probability of a unique search hit, so that you do not have to render the search process more precisely or to select the contact you are looking for from a list of contacts that have been found.

   If you do not want to wait for the time of delay, confirm your entry by pushing the # key and the search will be started. Pushing the * key cancels the process and you will return to the greeting prompt.

5. The search hit(s) will now be shown in your telephone display or a prompt will be played informing you that no contact could be found.

   a) **Unique match:** A unique search hit is announced and shown in the telephone display. You are connected immediately.

   b) **Several matches:** If several matches have been found for your search entry, you have to select one contact. Move up or down the list via the # key and select the corresponding keys to a list entry. The order in the list corresponds to the keys of the numbers 1 up to 5 maximum. You return to the greeting and thus to the search via the * key.
   If more than five matches have been found, the following options are announced:

      – You can be connected to the operator

      – You can repeat your entry in a more detailed way.

   c) **No match:** If no match could be found for your search, return to the search and thus to 1.).

   d) **Operator:** You have three attempts to find a contact. After the third failed search you will be connected to the operator.

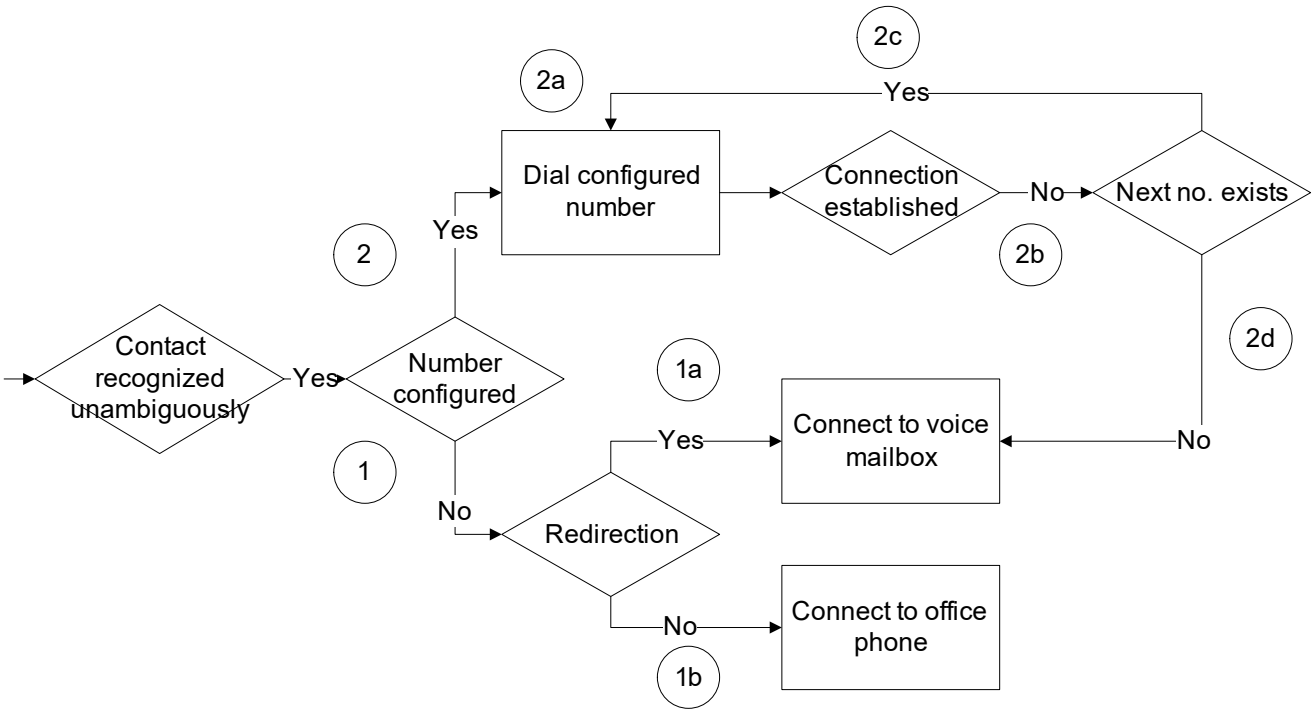
6. You will receive an announcement confirming that you are connected to the selected contact.

8.4.4 Be connected

NOTE: You cannot influence the actions that will be explained in the next paragraph. This paragraph is only meant to depict the principles of the connection setup.

If the selected contact's name could not be found unambiguously, two possibilities for the connection setup exist. These possibilities do not depend on the entries the caller made, but on the settings of the contact. These settings refer to the numbers configured in the *Web Assistant*. Consequently, the connection target depends on whether the respective contact has configured at least one phone number for further routing or if a redirection has been activated.

The following illustration demonstrates the possible steps and processes of the *Caller Guide*. The numbering in the illustration corresponds to the numbering of the enumeration of the single steps.



1. If no number has been configured for the selected contact, the following might be the case:

   a) The contact has been identified, since he/she has redirected his/her telephone to the *Caller Guide*. You will be connected to the voice mailbox of the selected contact.

   b) The contact has been recognized due to the caller's entries, however, he/she has not configured any numbers. You will be connected to the office phone, which is entered in the database for each OpenScape Xpressions user.

2. If at least one tracking phone number has been configured, the following steps will be performed by the *Caller Guide*:

   a) The first number in the list of tracking phone numbers that have been connected is dialed.

   b) If no connection to the contact can be established, the system checks whether further phone numbers are available for a possible connection.

   c) If additional numbers exist, they are dialed one after another.

   d) If no additional numbers exist or if no connection can be established to the additional numbers, you will be connected to the voice mailbox of the contact.

8.5 Commands

The following commands are available for voice-activated dialing.

Command	Description
“Yes”	This command confirms the connection setup to a contact that has been found. For this feature you can, depending on the configuration, either use the # or the * key.
“No”	This command discards the connection setup to a contact that has been found. You will return either to the search or to the hit list. For this feature you can, depending on the configuration, either use the # or the * key.
“Help”	Executing this command repeats the greeting prompt that contains a short explanation how to perform a search.
“Name”	This command starts the name dialing mode so that you are able to make search entries via the telephone keys.
<Name>	To search via voice-activated dialing you need to say the <name> of the person you would like to call clearly. The required order of first name and last name is explained in the announcement, since this order may vary due to the administrator settings. In both cases you can also only say the last name, but the recognition probability will then decrease.

8.6 Quick Reference Guide

The following quick reference guide provides you with the most important *Caller Guide* operating instructions.

8.6.1 Searching for a Contact via Telephone Keys

If you would like to look for the desired contact via your telephone keys, use the voice command “*Name*” or simply dial the name via your telephone. The name dialing mode to search for a contact via telephone keys will then be started.

Enter the last name and the first name of the contact you would like to find via telephone keys. Letters are assigned to each telephone key in alphabetical order. Push the respective telephone key for every single letter of the name you are looking for. However, push each key only once for each letter. For the name “Müller” e.g. push the key sequence “6835537”.

NOTE: You do not need to enter the complete name of the contact you are looking for. Entering only one letter already enables the search for a contact. After a short time of delay (depending on the administrator settings) an automatic search starts that already issues search hits, if the maximum number of allowed search hits is not exceeded. After this automatic search you can either select a match from the list, make the search more precise by entering additional digits or cancel and restart the search.

Confirm your entry by pushing the # key and the search will start automatically. Pushing the * key cancels the process and you will return to the search via name dialing mode (search via telephone keys).

Matching database entries are searched for your entry and the name of the search hit will be shown in the telephone display for confirmation as well as announced. If you receive a list with several matches, you need to select one search hit (Section 8.6.5, “Selecting Hits from the List in Name Dialing Mode”).

You may repeat the search three times. After these three search processes a connection to the operator will be established automatically.

8.6.2 Contact Search via Voice-activated Dialing

NOTE: Please make sure to say the names and commands clearly when you use voice-activated dialing. If a contact cannot be found, the reason could not only be that he/she is not in the directory, but it could also be that your pronunciation for the search has not been exact enough.

If you would like to look for the desired contact via voice-activated dialing, say clearly the last name of the contact you would like to find.

Your input is searched for and the name of the search hit will be shown in the telephone display as well as announced.

If the search by saying the last name is not unique, i.e. several entries with the same last name exist in the OpenScape Xpressions database, you need to render your search entry more precisely. Therefore say the first name of the selected contact or the number from the list that is played. If it is again not possible to find a unique contact, repeat saying the first name.

You may repeat the search three times. After these three search processes a connection to the operator will be established automatically.

8.6.3 Becoming connected via Telephone Keys

If a unique search hit is found in the name dialing mode, you will be connected immediately. For verification, the name of the contact will be announced and the name and the phone number will be shown in the telephone display.

If no unique search hit can be found via the name dialing mode but a list, you can find a respective explanation in Section 8.6.5, “Selecting Hits from the List in Name Dialing Mode”.

8.6.4 Becoming connected via Voice-activated Dialing

If you search for a contact via voice-activated dialing, the name and the phone number of the search hit will be shown in the telephone display and the name will be announced. If the recognition rate is above the threshold value that has been configured, you will be connected immediately. Otherwise, the result that has been recognized has to be confirmed first. A connection to this contact can be established with the voice command “Yes” or by pushing the # key. The command “No” or pushing the * key returns you to the search. If the result is not confirmed for three times or if three search runs had no success, you will be connected to the operator.

If no unique search hit can be found via voice-activated dialing but a list, you can find a respective explanation in Section 8.6.6, “Selecting Hits from the List in Voice-activated Dialing Mode”.

8.6.5 Selecting Hits from the List in Name Dialing Mode

If your entry was not unique, a list of your hits appears in the telephone display, provided that fewer than six hits were found. The list is thus limited to five entries to be displayed. Each entry is assigned to the telephone keys 1 to 5. The individual list entries are automatically processed. During this process the name and the phone number of the entry are displayed and the name is announced. By pushing the # key you jump to the next entry. Pushing the * key discards the hit list and you will return to the search.

8.6.6 Selecting Hits from the List in Voice-activated Dialing Mode

If your entry was not unique, a list of your hits appears in the telephone display, provided that fewer than six hits were found. The list is thus limited to five entries to be displayed. Each entry is assigned to the telephone keys 1 to 5. The individual list entries are automatically processed. During this process the name and the phone number of the entry are displayed and the name is announced. A connection to the selected contact can be established with the voice command “Yes” or by pushing the # key. Pushing the * key or saying the voice command “No” discards the hit list and you will return to the search.

8.6.7 Repetition of the Connection

If it is not possible to establish a connection with the first phone number, the next configured phone number in the OpenScape Xpressions system is searched for in an iterated process. This process is continued until a connection can be established to one of the contact's phone numbers indicated in the OpenScape Xpressions system, or until no further number is indicated. In this case you will be connected to the voice mailbox of the contact.

8.6.8 Connecting with Redirection Number

If the selected contact has not configured any phone numbers in the OpenScape Xpressions system, a connection to the voice mailbox of the selected contact will be established.

8.6.9 Fax Routing

The *Caller Guide* can recognize incoming fax messages and forward them to a selected contact. If a contact has been selected unambiguously, the fax will be forwarded to this contact. If a fax is sent to a device that is redirected to the *Caller Guide*, the contact is identified via the originally dialed number and the fax will be sent to the mailbox of this contact.

9 *Client Integrations*

The Client Integrations application allows using the Click-to-Dial function independently from the installation of a CTI client. You can thus implement and use this function in a large number of clients.

9.1 *Client Integrations* Features

The Client Integrations application lets you initiate phone calls via any journal entries from within specific clients (Click-to-Dial) installed for this function.

The following function are provided via the Client Integrations:

- Callback to originators of any messages.
- Direct call, for example via any contact, calendar and task entry that contains contact information.
- After initiating a call, the OpenScape Web Client call control opens automatically if the OpenScape Web Client URL is entered in the Client Integrations setup and the Use Click-to-Communicate option is set.
- Direct calling via marked phone numbers on internet pages for the browsers Microsoft Internet Explorer and Mozilla Firefox.

9.2 Supported Clients

You can install the *Client Integrations* features using the Client Integrations setup for the following clients:

- *Microsoft Outlook*
- *Lotus Notes*

> ***NOTE:*** In Lotus Notes you can use the Click-to-Dial feature for contact entries only.

- *Sametime Connect*
- *Microsoft Internet Explorer*
- *Mozilla Firefox*

You find the latest information about the supported clients and their versions in the OpenScape Xpressions Release Notice manual.

9.3 Using Client Integrations

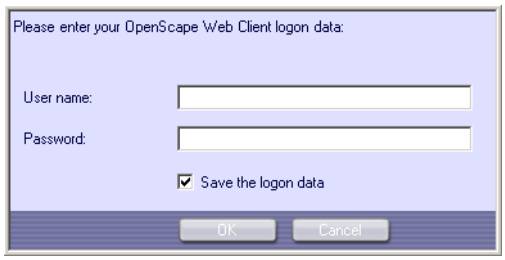
9.3.1 Usage Requirements

- The *Client Integrations* must be installed for the client from which you wish to use the functions.
- The journal and contact entries you wish to use for a return call must be available with a phone number.

9.3.2 Operation

How to call any journal entry from your mail client via the *Client Integrations*:

1. Select the entry you wish to call in your mailbox, calendar or address book.
2. Click on **Dial**.
3. Enter your user data for authentication if you have not done this yet.



NOTE: Authentication is only required when you use the call function for the first time or after changing the password. Thereafter, the call is initiated without previous authentication.

The call is initiated via the web client.

NOTE: If you have selected the Click-to-Communicate option during the installation, the call control opens directly for visualizing and controlling the calls.

10 MAPI Fax Printer Driver

After you have installed the MAPI fax printer driver you can send documents as fax message from any applications via the Microsoft MAPI interface or via the fax form of the *Microsoft Outlook Extensions*. To this, a printer driver named **Tiff Fax G3 TurboBits Printer** is installed on the system. This driver is directly connected to the MAPI interface. The document is sent to the printer driver via the **Print** function of your application, and transmitted as fax message from there.

IMPORTANT: The MAPI fax printer driver is not supported for terminal server environments.

How to send a document as fax from any application:

1. When your document is ready for sending, select **Print** in the relevant application. The selection menu for the printer driver with which the document is to be sent opens.
2. Select the printer **Tiff Fax G3 TurboBits Printer**.
3. Click on the **Print** button.

   Depending on the setting **Microsoft MAPI** (printer driver default) or ***Microsoft Outlook*** (if the *OpenScape Xpressions Microsoft Outlook Extensions* are installed), the appropriate form for sending the fax message opens automatically.
4. Enter the recipient address in the **To** field and, if required, copy recipients under **Cc**.

   When sending via **Microsoft MAPI** the name of the fax file is automatically set in the subject line of the fax message. You can replace this default with an individual subject entry or supplement it.

   When sending via ***Microsoft Outlook*** you can compose an individual subject entry.
5. Click **Send** to transmit the fax message.

11 Service Provider (MSP)

The Service Provider serves as global substructure for all client applications that want to use OpenScape Xpressions server services. Such clients are for example: *Lotus Notes Extensions*, *Microsoft Outlook Extensions* or the client *Communications* etc. While several client applications can simultaneously be operated on one computer, only one Service Provider entity is available.

The following services are provided:

- Local database (cache)

  Every client application does not have to keep its own database up to date. If required, the Service Provider synchronizes its local database with the database of the OpenScape Xpressions server. Thereby, the contents of the local database is made available to all client applications so that fast access is always possible.

- Store & forward interface

  Client applications can send documents to or receive them from a OpenScape Xpressions server. This refers to classic communication by fax, e-mail etc. The *optiClient 130* CTI journal operates via this interface as well.

- Transactions interface

  Client applications can communicate with the OpenScape Xpressions server components that support transactions. This enables in particular the CTI functionality for client applications as in *optiClient 130*.

According to requirements the MSP is automatically implemented upon the installation of a OpenScape Xpressions client component. When the installation is completed you will find the file `MSP.INSTALL.LOG` in the TEMP directory of the installing user, helping to detect errors if problems should occur.

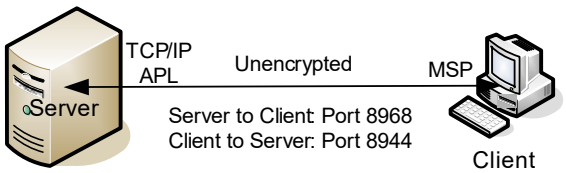
The Service Provider is started by the first client application requiring it. The Service Provider configuration module in the control panel is such an application.

For further information on the service provider and on profile definition refer to the *Server Administration* manual.

11.1 Connection of the OpenScape Xpressions Server to the Clients via the MSP

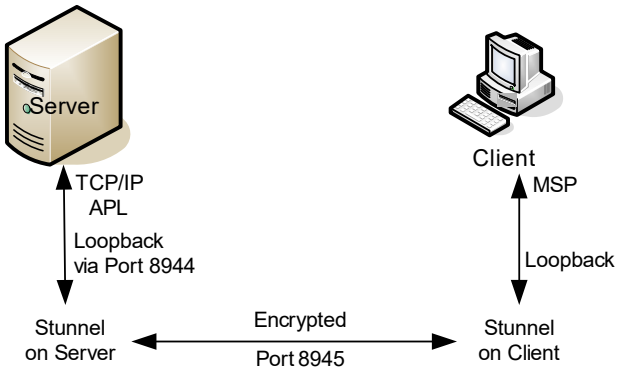
The MSP-based Windows client applications can also communicate with the OpenScape Xpressions server via an IP protocol.

On the server side the TCP/IP APL uses port 8944 for accessing the client. With active delivery from the TCP/IP APL to MSP-based client applications port 8968 is used. This type of communication is not encrypted. By means of a network sniffer you can play all data transmitted between server and client.



You can also communicate via a connection secured by SSL. On the server side, all corresponding requirements have already been met as a certificate has been configured for the **STunnel** program.

For a connection secured by SSL, port 8945 is used. If you then lock port 8944 in the Windows firewall, clients without activated encryption will not be accepted any more.



If a firewall is active on the client, the data transmission between OpenScape Xpressions server and client must be released by the firewall. In other words, if the firewall is active, the MSP on the local clients with the operating systems Windows XP and Windows Vista must be given outgoing access to the OpenScape Xpressions server. For this purpose the `MSPSVC.EXE` and `STUNNEL.EXE` programs are added to the exception list of the firewall. On an English Windows the programs are installed in the following directory: `C:\Program Files\Common Files\Cycos\Service Provider\`.

Depending on the operating system language the path may vary. In this case look for one of the above programs and determine the setup directory.

`MSPSVC.EXE` is the Service Provider. It is installed as service. `STUNNEL.EXE` is used for encrypted communication with the XPR server.

NOTE: Microsoft has fully disabled Interactive Service Detection starting with Windows 10 Build 1803 and Windows Server 2016 and 2019.

Please disable the **Allow service to interact with desktop' option on 'MRS Service Provider Service (MspSvc)** service properties.

This will prevent System Event log errors such as:

Event ID 7030:
“The MRS Service Provider Service (MspSvc) service is marked as an interactive service. However, the system is configured to not allow interactive services. This service may not function properly.”

The following steps are required:

For Windows XP

1. Open the control panel via **Start > Control Panel**.
2. Start the application **Windows Firewall**.
   The **Windows Firewall** dialog opens.
3. Switch to the **Exceptions** tab.
4. Click on the **Add Program...** button.
   The **Add a Program** dialog opens.
5. Click on **Browse...**.
   The **Browse** dialog opens.
6. Enter the path for the directory that contains the files `MspSvc.exe` and `stunnel.exe`.
7. Select the file `MspSvc.exe` and click on **Open**.
   The selected file is added to the programs of the exception list.
8. In the **Add a Program** dialog click on the **OK** button to complete the selection process for this file.
   You return to the **Windows Firewall** dialog.
9. Click on the **Add Program...** button again.
   The **Add a Program** dialog opens.
10. Click on **Browse...** again.
    The **Browse** dialog opens.
11. Enter the path for the directory that contains the files `MspSvc.exe` and `stunnel.exe`.

12. Select the file `stunnel.exe` and click on **Open**.
    The file `stunnel.exe` is added to the programs of the exception list.
13. In the **Add a Program** dialog click on the **OK** button to complete the selection process.
    You return to the **Windows Firewall** dialog. The selected programs are now integrated in the list under **Programs and Services**.
14. In the **Windows Firewall** dialog click on **OK**.
15. Close the control panel.

In *Windows XP* the firewall for these programs is now open.

For Windows Vista

1. Open the control panel via **Start > Control Panel**.
2. Start the application program **Windows Firewall**.
3. There, enable the link **Allow a program through Windows Firewall**.
   The **Windows Firewall** dialog opens.
4. Switch to the **Exceptions** tab.
5. Click on the **Add Program...** button.
   The **Add a Program** dialog opens.
6. Click on **Browse...**.
   The **Browse** dialog opens.
7. Enter the path for the directory that contains the files `MspSvc.exe` and `stunnel.exe`.
8. Select the file `MspSvc.exe` and click on **Open**.
   The selected file is added to the programs of the exception list.
9. In the **Add a Program** dialog click on the **OK** button to complete the selection process for this file.
   You return to the **Windows Firewall** dialog.
10. Click on the **Add Program...** button again.
    The **Add a Program** dialog opens anew.
11. Click on **Browse...** again.
    The **Browse** dialog opens.
12. Enter the path for the directory that contains the files `MspSvc.exe` and `stunnel.exe`.
13. Select the file `stunnel.exe` and click on **Open**.
    The file `stunnel.exe` is added to the programs of the exception list.

14. In the **Add a Program** dialog click on the **OK** button to complete the selection process.
    You return to the **Windows Firewall** dialog. The selected programs are now integrated in the list under **Programs and Services**.

15. In the **Windows Firewall** dialog click on **OK**.

16. Close the control panel.

In Windows Vista the firewall for these programs is now open.

11.2 Setup Adjustments

You can edit the .msi file of the client application involved in the MSP installation to perform a “silent”, thus without user interaction, MSP setup. This requires editing the msi file with a Windows Installer Package Editor (for example “Orca”) to allocate the MSP parameters.

You find the editable parameters in the “Property” table of the msi file.

You can transmit the following parameters for a “silent” MSP setup via the msi file of the corresponding client application:

Creating a profile for the MSP automatically

Creating the MSP profile automatically must be activated.

Property	MSP_CREATEDEFAULTPROFILE.DCD7C495_D8E8_4B53_ACEC_7C097A0C1B81
Value	***0*** (disabled) or ***1*** (enabled)
Default Value	***0***

Profile name

Transmission of a profile name for the profile with which the user logs on to the client application. The profile name is a descriptive entry that will later be displayed for selecting different user profiles.

Property	MSP_DEFAULTPROFILE.DCD7C495_D8E8_4B53_ACEC_7C097A0C1B81
Value	*<profile name>*
Default Value	***default***

User ID

Transmission of the user ID for the profile with which the user logs on to the client application. If the XPR server supports Windows authentication, you can configure the login via Windows user account by transmitting a ***0***.

Property	MSP_DEFAULTUSER.DCD7C495_D8E8_4B53_ACEC_7C097A0C1B81
Value	***<user ID>*** or ***0***
Default Value	***ADMINISTRATOR***

Server name

Transmission of the XPR server name for the profile with which the user logs on to the client application.

Property	MSP_DEFAULTSERVERNAME.DCD7C495_D8E8_4B53_ACEC_7C097A0C1B81
Value	*<server name of the **XPR** server>*
Default Value	***MYSERVER***

Server name

Transmission of the XPR server IP address for the profile with which the user logs on to the client application.

Property	MSP_DEFAULTSERVERIP.DCD7C495_D8E8_4B53_ACEC_7C097A0C1B81
Value	*<IP address of the **XPR** server>*
Default Value	***127.0.0.1***

12 MSP TAPI Service Provider (MSPTSP)

The MSPTSP (MSP TAPI Service Provider) enables calling from within, for example, *Microsoft Outlook*, with dialing out being the only option when *Microsoft Outlook* is used. For certain other applications there are also the following options (the TAPI features appear in brackets):

- Answer a call (Answer)
- Transfer without consultation (BlindTransfer[1])
- Call replacement, e.g. callback if busy (CompleteCall)
- Three-party conference after consultation (CompleteTransfer)
- Forward after consultation (CompleteTransfer)
- Drop an incoming call (Drop)
- Hang up (Drop)
- Forward (Forward)
- Please do not disturb (Forward)
- Hold (Hold)
- Call (MakeCall)
- Pick up (Pickup)
- Redirect (Redirect)
- Three-party conference (SetupConference)
- Consultation (SetupTransfer[2])
- Alternate (SwapHold)
- Unhold

The MSPTSP enables you to use several lines at a time, i. e. an application can be opened several times and in different ways. The MSPTSP enables access to XPR CTI functionalities also for foreign TAPI based applications via third party TAPI clients. The MSPTSP is a TAPI service provider transforming the TAPI commands into CTI transactions of the XPR server. As usual with OpenScape Xpressions, communication occurs via the MSP. However, a specialty is here that the MSPTSP operates as TAPI service provider in the operating system's system context. Consequently, it cannot deploy already configured MSP user profiles

1. *Blind Transfer:* an incoming call will be transmitted to another extension even if the line is busy or the corresponding subscriber cannot be reached. In this case, the caller has to call again because he/she will not be automatically put through to the other party once the line is free again.
2. For the *Setup Transfer* you have the possibility to forward a call or to set up a three-party conference.

because it is not authorized to access such data. So for the MSPTSP a separate user profile must be configured, which is valid for the computer the MSPTSP runs on. Of course, login via the Windows account is also impossible for this reason. For the same reason MSPTSP applications cannot normalize phone numbers depending on the invoking user.

12.1 Installation

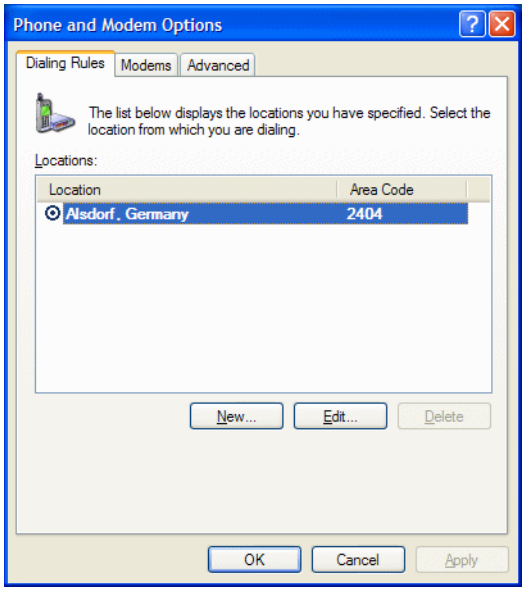
Setup copies the TSP files into the system directory and installs the TSP. In case the MSP has not been installed yet, the MSPTSP setup will install the MSP prior to the TSP setup.

12.2 Configuration

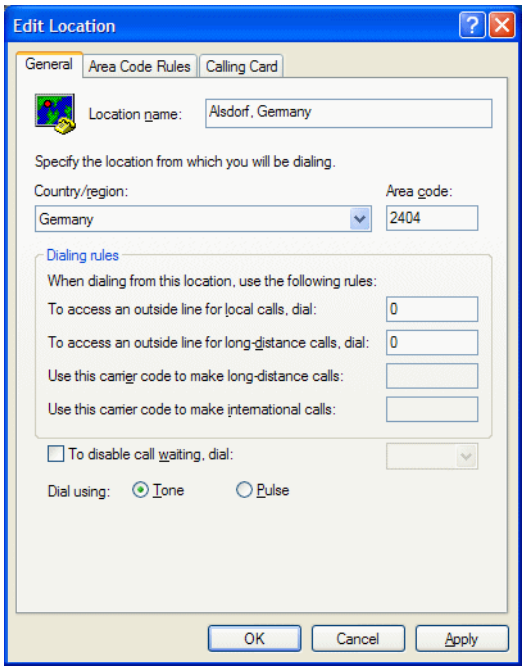
NOTE: The configuration is described for the Windows 2000 operating system. The description may slightly deviate for other Windows operating systems.

After the setup has been finished, the MSPTSP prompts you to start the program now. At this point you can directly perform the configuration. This is particularly advisable for inexperienced users. Otherwise, you can configure the MSPTSP later in the start menu under **Settings > Control Panel > Phone and Modem Options** on the **Advanced tab** under **MSP TAPI Service Provider**. The configuration of the MSPTSP can also be done via the **MSPTSP** icon on the desktop (as far as it has been created). You can also perform the configuration in the respective application (e. g. *Microsoft Outlook*). The different configuration possibilities will be described later on in the text.

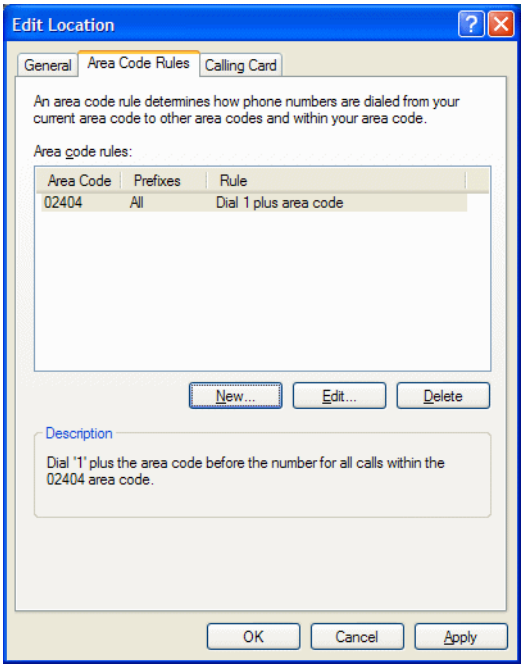
You will see the following dialog by selecting **Settings > Control Panel > Phone and Modem Options** in the start menu. There, you can configure the TSP via the **Dialing Rules** and **Advanced** tab.



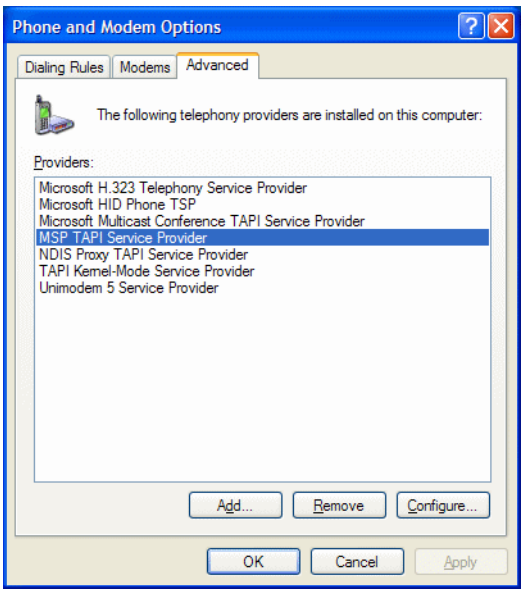
You can configure your location settings on the **Dialing Rules** tab. Click on the **New...** button (as far as no location exists), and configure the corresponding settings on the **General** tab in the **Edit Location** dialog. Enter the **Location name**, **Country/region**, the **Area code**, the number to **access an outside line for local calls** and the number to **access an outside line for long-distance calls**. Then click **Apply**.



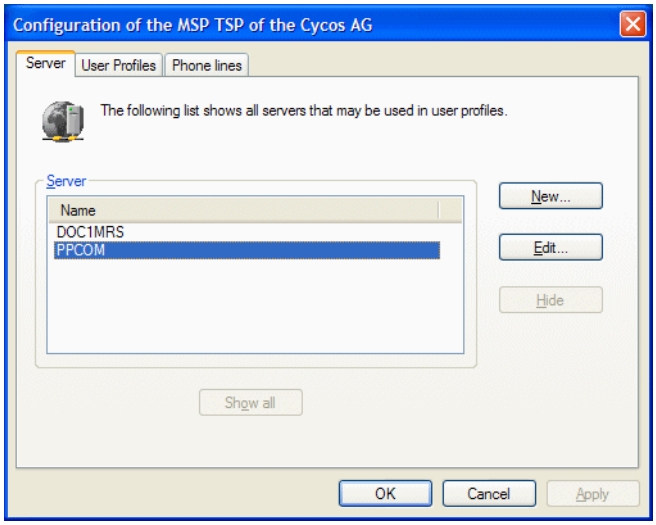
You can define rules for phone numbers of your own and of other area codes on the **Area Code Rules** tab. You can determine how phone numbers are to be called within your area code and outside. Click on the **New...** button in order to create a **New Area Code Rule**.



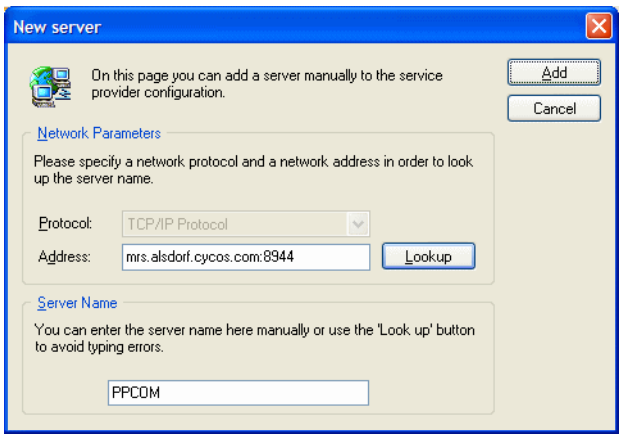
Select the **Advanced** tab in the **Start > Settings > Control Panel > Phone and Modem Options** dialog. Select the **MSP TAPI Service Provider** entry and click on the **Configure...** button in order to define the server settings, user profiles and lines.



After a click on the **Configure...** button, the following dialog opens.



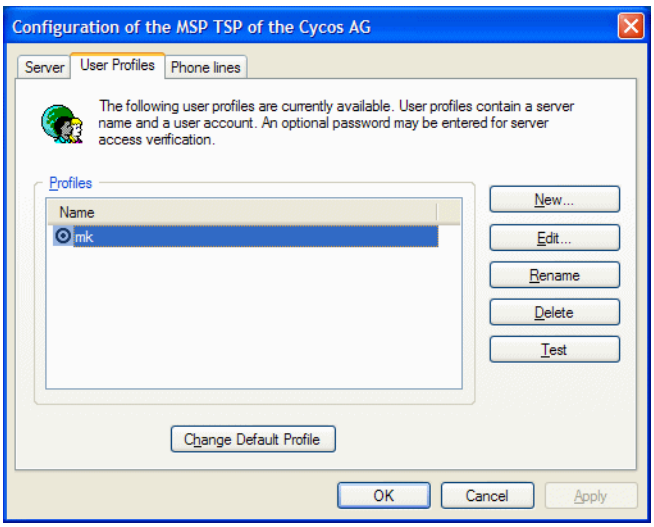
The **Server** tab occurs first when the MSP has been unable to find an XPR server. The MSP already looks for existing servers during the installation and adds them to the list in the dialog at the right. If your XPR server does not appear in the list, add a new server by clicking the **New…** button.



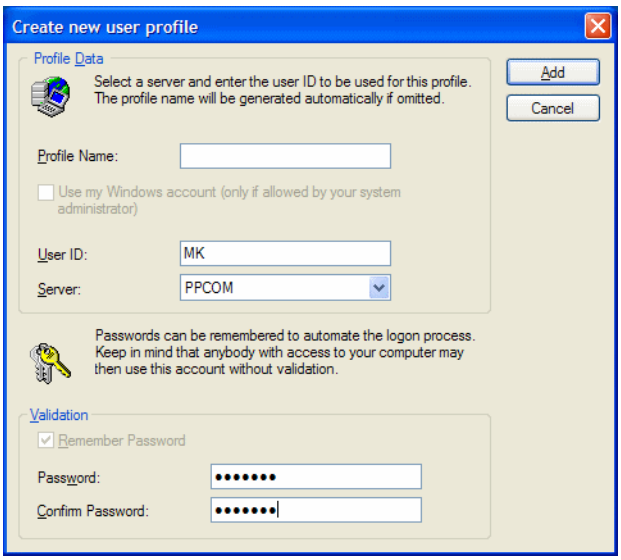
Enter the network address or the name of the computer in the **New server** dialog, and search for the port number and the server via the **Lookup** button to avoid typing errors. Alternatively, you can enter it manually.

If an XPR server is already available, but no user profile has been configured, the **User Profiles** tab will be shown first.

Select the **New…** button in order to create a new user profile. As the MSPTSP runs in the system context, it cannot read existing user settings from an already installed MSP. Thus, a new user profile has to be created anyway. The corresponding configuration settings can be seen and changed in the MSPTSP as well as in the respective TAPI application.



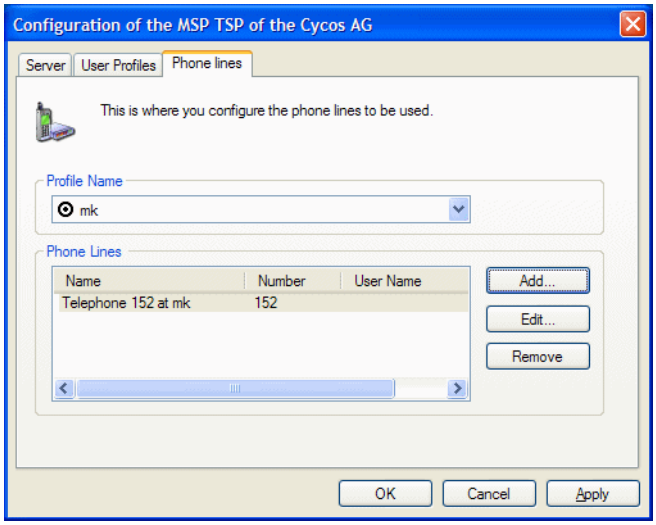
Create one or more user profiles on the **User Profiles** tab via **New...**. The **Profile Name** does not have to be entered, as it is generated automatically. Enter the **User ID**. This is necessary for logging on to the server. Enter the server name under **Server**. Afterwards, you save your password by activating the **Remember Password** check box. Enter your password and confirm it by entering it once again. Click the **Add** button afterwards.



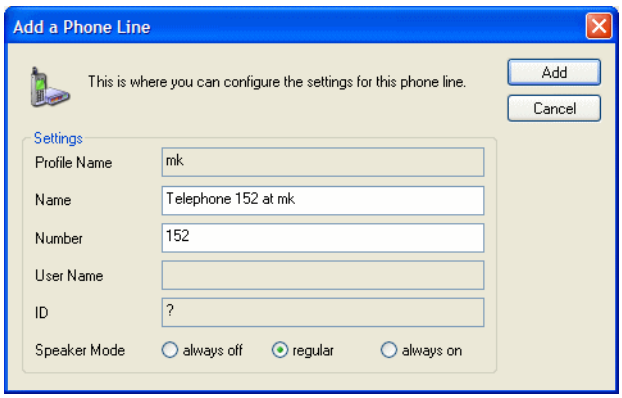
NOTE: The Windows user account cannot be used for login since the MSPTSP runs in the system context.

You can enter the lines respectively the telephones you want to use on the **Phone lines** tab. Click the **Add…** button for this purpose.

Telephone devices as well as lines can be added or deleted dynamically. Lines can be closed or opened as necessary.



The **Profile Name** already exists. Enter the name of your extension under **Name**, e. g. Telephone 462. Enter the number of your extension under **Number**. The **User Name** and the **ID** will be generated automatically. Select the desired **Speaker Mode**. The speaker mode option **always off** means that the speaker is always off, independent from the settings performed in the TAPI application. **Regular** means that the speaker can be controlled by the TAPI application as far as the corresponding settings can be performed there. **Always on** means that the speaker is always on, independent from the settings performed in an attached TAPI application. We recommend the option **always on**, since most TAPI applications do not control the speaker mode. Click the **Add** button afterwards. The changes will become active at once.



NOTE: All changes will become at once active after clicking the **Apply** or **OK** button. The computer or the TAPI application need not be restarted.

12.3 Error Search Logging

As is possible for all XPR server clients, you can use the logging tool for clients to create a log file also for the MSPTSP. In case of an error or whenever required you can then activate a logging. To create the log file, you need to execute the `UnifiedLogTool.exe` program on the client. This program must previously be copied to the appropriate client from the `<XPR Install>\SDKTools` folder.

You find information about the client logging tool options in the *XPR Server Administration* manual.

12.4 Update

The automatical update of the MSPTSP via server is not supported up to now. Please make sure that the MSPTSP does not run anymore if you want to replace it by a newer version.

12.5 Uninstallation

The uninstallation wizard removes all providers that use the TSP. Afterwards the TSP files will be deleted from the system directory. Problems occur when the TSP cannot be deleted because it is being used by one or several TAPI applications. Therefore, make sure that no TAPI application is running when you want to remove the TSP.

12.6 MSPTSP via *Microsoft Outlook*

To establish a phone connection from within *Microsoft Outlook*, select under **Contacts** one of the address entries you have specified. You will get into a context menu by a rightclick.

In this context menu select **Call Contact...**. Afterwards, click on the **Start Call** button. Your telephone rings and the connection to the corresponding party will be established.

Furthermore, you can dial a phone number that does not exist in the contact folder. A telephone icon  will appear when you open the contact folder. Click on the arrow on the right of the telephone icon to open a context menu. In there you find the menu items **Redial**, **Speed Dialing**[3] and **New Call...** besides the entry of an existing contact. Click on **New Call...**. In the **New Call...** menu you can enter the desired phone number. Afterwards, click on **Start Call**. Alternatively, you may enter the shortcut key **[Ctrl]+[Shift]+[D]** in order to start a new phone call.

12.6.1 MSPTSP Configuration in *Microsoft Outlook*

The MSPTSP configuration can also be performed via *Microsoft Outlook*.

1. Invoke the context menu with a rightclick on an address entry.
2. Select the **Call Contact...** menu option. The **New Call** dialog opens.
3. Click on the **Dialing Properties...** button. Via the **Dialing Rules** tab you can perform the corresponding settings as described for the **MSPTSP Configuration** (see Section 12.2, “Configuration”, on page 92).

The **Dialing Options** are also available via the **New Call** dialog. The **Line Properties** can be entered here, as described in the **MSPTSP Configuration**, as well. Furthermore, you can configure the **Dialing Properties**.

3. You can enter speed dialing numbers in the Dialing Options... dialog in *Microsoft Outlook* (**Contacts > Call Contacts... > Dial Options**).

You can make the configuration settings under **Dialing Properties... > Dialing Rules > New...** in the **New Location** dialog as in the **MSPTSP Configuration** dialog.

Right-click on a contact to open the contact menu **Call Contact...**. Subsequently click on **Dialing Options > Line Properties...**. There you will find configuration settings you can either perform under MSPTSP or under *Microsoft Outlook*. The **Profile name** is automatically generated. Enter the name (description) of your extension under **Name**, e.g. Telephone 100. Enter the number of your extension under **Number**. The **User Name** and the **ID** will be generated automatically. Then select a **loudspeaker mode** and click **Save**.

13 *Application Builder*

The *Application Builder* is a program with a graphic editor that allows the user to assemble and configure a model of a voice dialog system (application model, application workflow) in the form of a call flow (block diagram or flow chart).

The flow chart consists of blocks and connections between these blocks. The flow chart blocks are controls that, for example, play a sound file, perform a database query or establish a phone connection to a subscriber. The connection lines between the controls in the flow chart indicate from which control a transition to another control is possible. Assembling means that the user determines which controls exist in the flow chart and which controls are interconnected. Configuring means that the user may set control properties. For example, he/she can set for a control to play sound files which sound files to play and in which sequence. The flow chart is - as described above - merely a model of a voice dialog system. Thus, it does not contain any information about the execution of the model in an application, e. g. how sound files are accessed and how these sound files are forwarded to a PBX so that a caller can listen to these files.

The result delivered by the *Application Builder* is a Java file, which represents a flow chart (application model, application workflow) with all of its control and connection properties. This file comprises the data which define an application and differ from other applications.

13.1 *Application Builder* Features

The *Application Builder* enables the easy creation of an interactive telephone application for your company. Synonyms for this are Automated Attendant, IVR (Interactive Voice Response), speech portal, voice server and voice dialog system. One or several phone numbers are assigned to such an application and when they are called, the following greeting may be played:

”*Welcome to the XY company. If you would like to be connected to one of our assistants and know his/her extension, please push 1. If you would like to be connected with our hotline, please push 2. If you would...*”

The *Application Builder* possesses among other things the following features:

- Creating and editing applications
  - Chaining different applications
  - Searching for specific characteristics and elements of all applications. For example, all applications that use a specific prompt can be put out. In case of a successful search, the results also deliver the prompt position within the application.
  - Bookmarks for indicating the most different positions in the application

  - Integrating prompts in the respectively available languages
  - Supporting text-to-speech for announcing text
  - Using variables to store and forward data and information
  - Creating statistic raw data for reporting usage
  - Importing Application Generator applications used so far in the Application Builder
- Creating and modifying call flows that represent the possible functionality within an application
  - Creating a call flow by drag & drop of controls within a clearly structured editor
  - Customizing call flow views
  - Attaching notes to a call flow
  - The greatest possible graphic as well as functional flexibility when creating call flows
  - Linking different call flows
- Controls: controls represent the smallest modules of a call flow
  - Various controls are available for different functionalities
  - Use of time profiles and time zones allows date- and time-dependent flow
  - Flexible prompt playback possible
  - Besides default settings, controls contain many configuration and linking options
  - Use of TTS (text-to-speech) if licensed
- Language modification for GUI, documentation and online help after a program reboot

13.2 Features of an Application

An application created with the *Application Builder* may have the following features.

- Playing and re-recording of sound files
- Application-flow control by the caller using a menu and making entries via DTMF keys or voice
- Performing actions depending on date, weekday, national holidays and time considering the time zone
- Branching in the menu navigation depending on statistic as well as dynamic values such as the waiting loop allocation status
- Forwarding to an extension inclusive return call initiation
- Speech recognition
- Call recording
- Creating and applying call flow rules using specific conditions
- Definition and flexible use of variables
- Sending documents of different formats
- Searching for contacts
- Selecting a supported language
- Database query
- File access
- Starting instant-messaging systems
- Protection from infinite loops in the menu navigation
- Monitoring and statistic registration of an application execution via reporting

You find the detailed description of the *Application Builder* in the *Application Builder* manual.

Acronyms

This list contains the acronyms used in this manual.

Acronym	Definition
BMP	Image file format – bitmap graphic format by Microsoft
CTI	Computer Telephony Integration – telephone control by PC
DCX	Image file format – graphic format for fax by Microsoft
GSM	Global System for Mobile Communications – cell phone standard
HTML	Hypertext Markup Language
IM	Integrated Messaging
IMAP	Internet Message Access Protocol
IP	Internet Protocol
IVR	Interactive Voice Response – DTMF or voice-controlled telephone application.
JPG	Graphics format of the Joint Photographic Experts Group
LDAP	Lightweight Directory Access Protocol
PC	Personal Computer
POP3	Post Office Protocol, protocol for polling messages from an Internet provider
SMS	Short Message Service
SMTP	Simple Mail Transfer Protocol, default Internet mail protocol
TAPI	Telephone Application Programing Interface
TG3	Image file format – multi-page compressed TIFF fax format
TIF	Image file format – Tagged Image File Format
TSP	TAPI Service Provider
TTS	Text To Speech, text to voice conversion
TUM	True Unified Messaging
URL	Uniform Resource Locator, unique Web address
VPN	Virtual Private Network
WAV	Acronym for wave format, data format for sound files
WWW	World Wide Web

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