A MITEL
PRODUCT
GUIDE

Unify OpenScape Xpressions

IBM Notes Extensions

User Guide

11/2018

Mitel

Notices

Trademarks

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History of Changes

Date	Changes	Reason
2011-12-09	First creation	
2012-02-10	Note for using the VM2TXT feature when sending voicemails added (see page 28)	CQ00190069
2012-07-10	You cannot enter a message text in the text entry field of a voice message (see step 7 on page 24).	CQ00202919
2014-02-10	Starting with version 9, "Lotus Notes" and "Lotus Domino" are called "IBM Notes" and "IBM Domino".	
2014-02-10	IBM Notes 9 and IBM Domino 9 are supported.	FRN6618, FRN7467
2015-10-13	ADDED: Note to Chapter 1	UCBE-2056

1 Introduction

Thank you for the decision to operate the XPR (Message Routing System) under Lotus Notes.

XPR for Lotus Notes extends your existing Lotus Notes application by the functions of an advanced unified messaging system that integrates all communications (telephony, e-mail, voice mail, fax and SMS) on one platform, thus significantly improving workstation efficiency. In addition you can extend every workstation by multimedia call center functions.

Using XPR with Lotus Notes has the following advantages:

*   The entire message administration occurs clearly and in one place.

*   Simple transmission and receipt of fax, e-mail and voice messages and sending of SMS messages on the familiar Lotus Notes interface.

*   CTI features such as telephone journal in Lotus Notes for all telephone calls and simple dialing from the address book.

*   Use of optiClient 130.

*   Mobile access via Web to the stationary workplace telephone and to all messages.

*   Web conferences, voice conferences and combined voice/web conferences

*   Easy learning owing to integration in the familiar Lotus Notes interface.

IMPORTANT: Do not use the features "Notes Shared Login" and "Single logon" on a Notes Client that is installed on an Xpressions machine.
The "Notes Shared Login" is enabled through policy configuration. If Notes Shared Login is configured, the "Notes Client Single Logon" feature must be installed and the service 'Lotus Notes single Logon' must be disabled via Start > Settings > Control Panel > Computer Management > Services and Applications > Services. The option "Log in to Notes using your operating system login" must also be disabled via File > Security > User Security.
For more information on this feature you can also visit the following web page: http://www-01.ibm.com/support/knowledgecenter/ssktmj_8.5.3/ com.ibm.help.domino.admin85.doc/h_enabling_notes_shared_login_steps.html

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1.1 Who should read this Manual?

This manual describes the use of the XPR extensions integrated in Lotus Notes from the user's view. All screenshots and operation paths refer to version Lotus Notes 6.x. The described functionality is available under the other supported versions of Lotus Notes and IBM Notes as well. Refer to the *OpenScape Xpresssions Release Notice* for details about the supported versions.

NOTE: The products Lotus Notes and Lotus Domino are called IBM Notes and IBM Domino starting with version 9.

Information on the structure and administration of the XPR system with Lotus Notes are described in a separate administrator manual.

1.2 General Notes for this Manual

1.2.1 Manual Structure

The manual is divided into the following sections:

- Introductory chapter with general notes on the product and on how to use the manual (current chapter).

- Instructions on how to use the Lotus Notes Mail extensions when using Lotus Notes R6.x (from Chapter 2).

- Instructions on how to use the conferences (from Chapter 3)

- Description of the user-defined setting options when using Lotus Notes R6.x (from Chapter 4).

- Appendix for using web conferences (from Chapter A, "Web Conference Client")

1.3 Document Conventions

The product name OpenScape Xpressions is abbreviated by **XPR** in this manual.

The following conventions are used in the manual to clearly distinguish the various types of information.

1. Single operating instruction steps are numbered.

- Enumerations are indicated with dots.

NOTE: A note in inserted in the text to draw your attention to a feature or to provide information that facilitates working with the program.

IMPORTANT: Signals information of high priority. The corresponding details must be heeded to avoid damages to the system or loss of data.

Indications of operating controls, such as buttons and window captions, are emphasized in boldface, for example, **Login Options**.

1.4 Acronym Directory

The following table lists the acronyms used in alphabetic sequence.

Acronyms	Description
APL	**A**ccess **P**rotocol **L**ayer
CTI	**C**omputer **T**elephony **I**ntegration

2 Using Lotus Notes Mail Extensions with Lotus Notes 6.x

The Lotus Notes Mail extensions are provided with the Lotus Notes e-mail client. If you open the e-mail client, you can select the desired mail extension via the menu **Create > Unified Messaging** for

- Fax (mail extension to send fax messages),

- Fax On Demand (mail extension to poll fax messages),

- SMS (mail extension to send short messages) or

- Voice (mail extension for sending voice messages).

2.1 Requirements

IMPORTANT: Lotus Notes offers an archiving option for cleaning up the mail database and releasing memory not used yet. If you use this option please be sure to execute the ensuing steps.

When archiving is active, execute the following steps:

1. Open the mail database.

2. Select in the menu **Actions** > **Archive** > **Settings...**.

   The **Archive Settings** dialog opens.
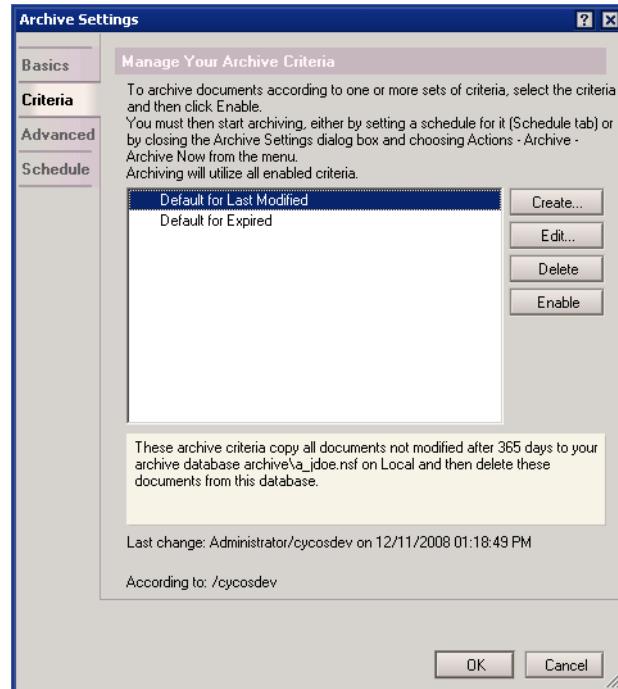
   Select a criterion and click on the **Edit** button.

3. The **Edit Archive Criteria** dialog opens.
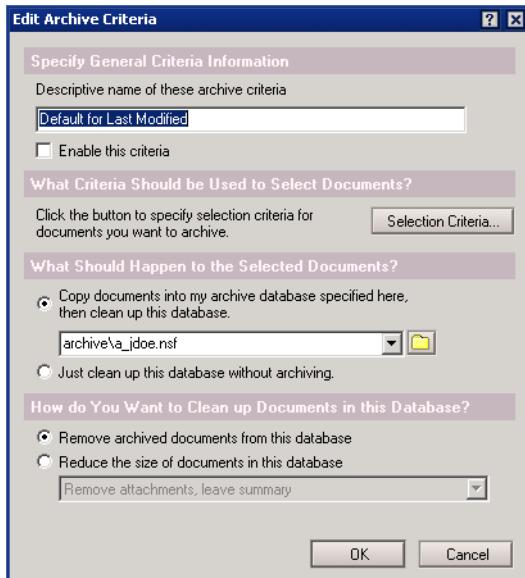
Click on the **Selection Criteria...** button.

4. The **Archive Selection Criteria** dialog opens.
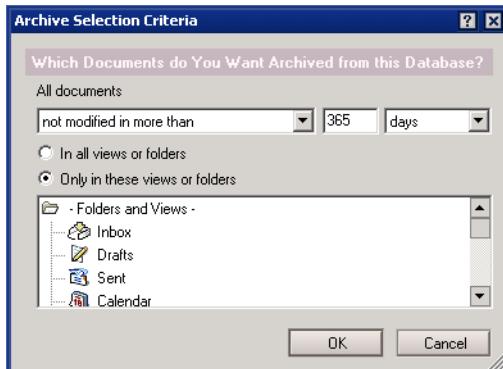
a) Activate the **Only in these views and folders** radio button.

> **IMPORTANT:** It is important that you activate this radio button. Do not activate the **In all views or folders** radio button, because your person document in your user database will be deleted then.

b) Select the views and folders to be searched for documents to be archived.

> **IMPORTANT:** You must no select the **Unified Messaging** view if it is available.

5. Execute step to step for criteria shown in the dialog in step .

2.2 Sending Fax Messages

To send a fax message proceed as follows:

1. Start the Lotus Notes e-mail client.

2. Select **New Fax** in the **Create > Unified Messaging** menu. The mail extension for fax message transmission is subsequently opened in a new window.
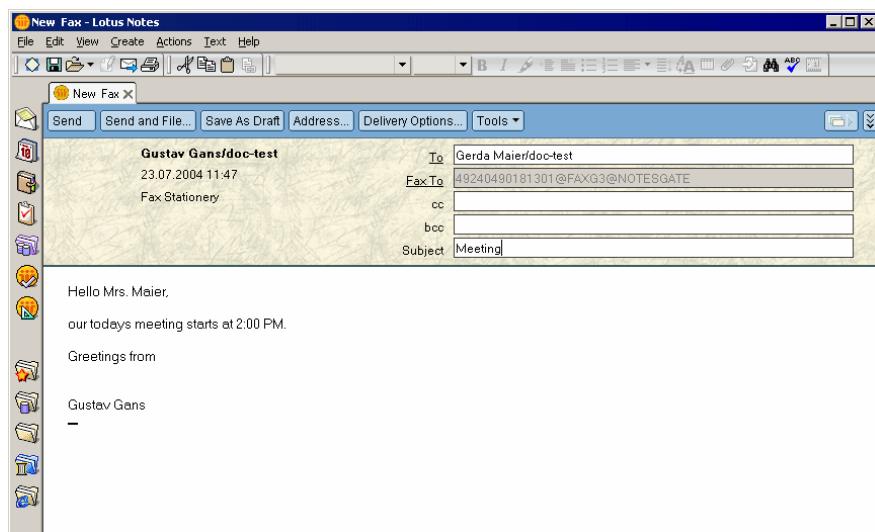
3. To select a recipient click the **Address** button. The address book opens.
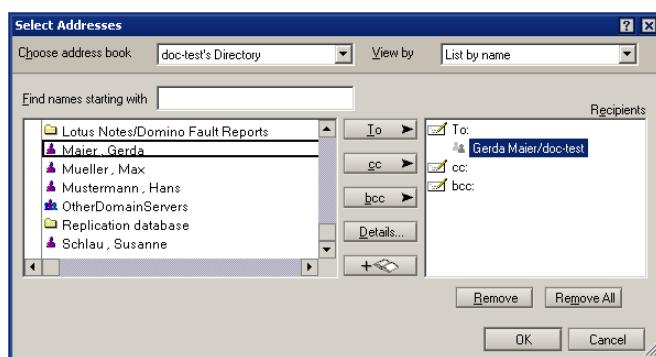
4. Select a recipient form the list on the left hand side in the address book and click the **To** button. The selected entry is copied to the **Recipient list** on the right hand side of the address book.

5. Via the buttons **CC** and **BCC** you may optionally select recipients who are to receive a **CC copy** or a **BCC copy** of the fax message. This copy will then be delivered to the recipients as Lotus Notes mail with an attached fax message (file attachment).

6. Confirm the selection of the recipient with **OK**. The address book closes.

NOTE: Several recipients may be selected at the same time for a fax message.

You can also manually enter a fax number in the **To:** address field (if e.g. a recipient does not exist in the address book).

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7. Enter a subject in the **Subject** field.

8. You can send the fax on behalf of another user. To do so, execute the following sub-steps:

NOTE: The **Note 'Principal' Field in Notes Mail** checkbox must be activated for this feature to work (see administrator documentation *Lotus Notes Gateway*).

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   a) Click on the **Display** button.

   b) Select **Sender Information**.

      The **From** field is shown below the **Subject** field.

   c) Click on the **From** link.

   d) Select the user on whose behalf you wish to send the fax.

9. Enter your message in the **text entry field**.
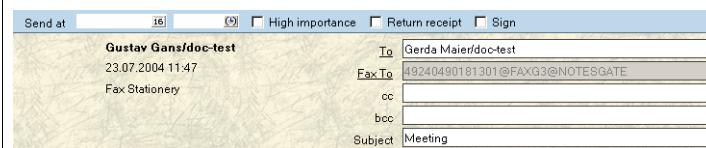
10. After entering your fax message you can immediately transmit it to the specified recipient by enabling the **Send** button.

Optional settings:

The following table describes additional settings and send options that you can use for the transmission of the fax message.

Option	Description
Icon	Clicking this icon adds the following functions to the header of the fax send form: • In the **Display Recipient** field the recipient(s) of the fax message is/are displayed. If you select a recipient here, his/her contact data is displayed in the opposite fields (if the recipient exists in the address book). • In the **Fax Stationery** field you can select the fax stationery the fax message is to be sent with.
Icon	Clicking this icon adds the following functions to the header of the fax send form: • If the fax message is not to be sent immediately, you may set a send date and a send time with the **option fields** below **Send at**. • You may set the message to **High Importance** and request a **Return receipt**.
Buttons **Delivery Options** and **Tools**	These buttons provide additional send parameters Lotus Notes supplies by default. Hints to their usage can be found in the Lotus Notes help.

2.3 Using the Lotus Notes Fax Printer Extension

The **XPR Fax** client component (Lotus Notes fax printer extension) enables sending fax messages from any application via Lotus Notes. A fax printer driver is therefore installed on the system, via which the created fax messages are transmitted to the Lotus Notes client.

After the transmission via the fax printer driver the Lotus Notes client is started and the fax message is displayed with a selected fax stationery. Via the **Send** button the fax message can then be sent.

In the Lotus Notes client the menu item **XPR Fax** is available in the **Actions** menu. By selecting this menu item a configuration dialog will be opened.
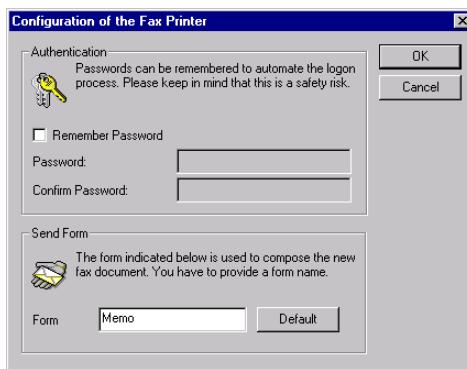
You have to enter your Lotus Notes user password in the field **Authentification**. It is used for opening the Lotus Notes client.

IMPORTANT: The Lotus Notes user password must also be modified in this dialog (e.g. after allocating a new Lotus Notes user ID)!

If you activate the option **Remember Password** you do not have to enter your password at the start of the Lotus Notes client via the fax printer driver.

In the **Send Form** section you can select which fax form is to be used.

2.4 Polling Fax Messages

With the help of the fax-on-demand feature prepared fax pages can be polled from a fax-on-demand service. The procedure is similar to the one described with fax transmission. Proceed as follows:

1. Start the Lotus Notes e-mail client.

2. In the **Create > Unified Messaging** menu select the **Other...** and then the **Fax-on-demand** menu option. The mail extension for fax message polling is opened in a new window.
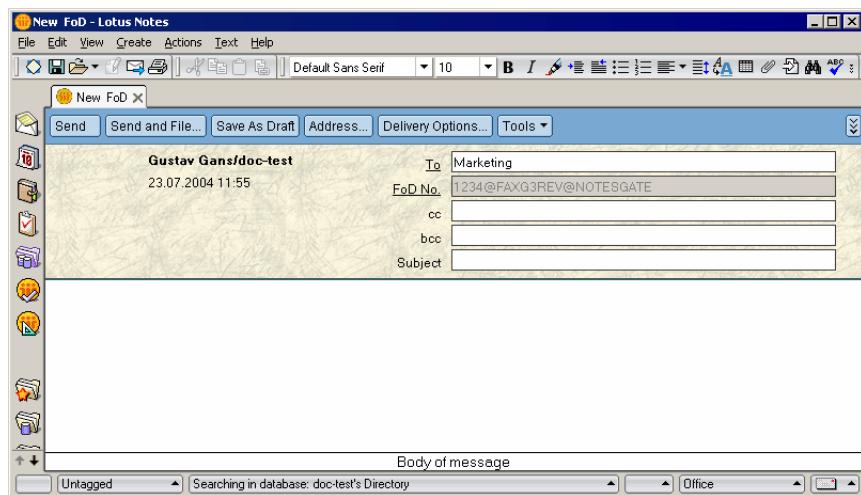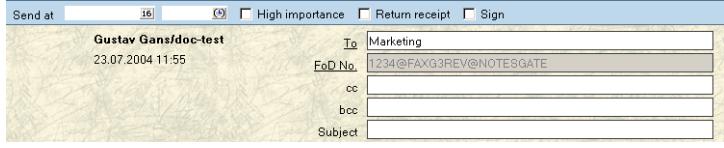
3. To select a fax-on-demand service click the **Address** button. The address book opens.

4. Select a fax-on-demand service form the list on the left hand side in the address book and click the **To** button. The selected entry is copied to the list on the right hand side of the address book.

5. Confirm the selection of the recipient with **OK**. The address book closes.

NOTE: You may also enter a fax number manually in the address field **To:** (if e.g. a fax-on-demand service does not exist in the address book).

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6. You can optionally enter a **Subject:** in the field provided.

7. Press the **Send** button to immediately poll the fax message.

Optional settings:

The following table describes additional settings and polling options that you can use for polling a fax message.

Option	Description
Icon	Clicking this icon adds the following functions to the header of the fax-on-demand form: • If the fax polling is not to be started immediately, you may set a polling date and time with the **option fields** below **Send at**. • You may set the fax-on-demand to **High importance** and request a **Return receipt**.
Buttons **Delivery Options** and **Tools**	These buttons provide additional send parameters Lotus Notes supplies by default. Hints to their usage can be found in the Lotus Notes help.

2.5 Receiving Fax Messages

> *NOTE:* Prerequisite for the use of the fax viewer is the installation of the ActiveX client components (see *administration manual of the Lotus Notes Gateway*).

Received fax messages are opened in a fax viewer that offers additional functions for editing a fax message.

You have to modify settings in your User Preferences so that the fax viewer opens automatically when a fax message is opened. Proceed as follows:

1. Open the dialog **User Preferences** via **File** > **Preferences** > **User Preferences**.

2. Select the option **Use Tab to navigate Read-Only documents** in the **Additional Options** list on the **General** tab.

3. Apply the modifications with **OK**.

4. Confirm the information dialog, afterwards restart your Notes client.

If you do not configure this setting, you will receive a warning when you open a fax message and have to start the fax viewer manually via an icon in the message caption bar. If you do not want to receive this warning any more in future, you can deactivate it via the check box **Do not show this warning again**.
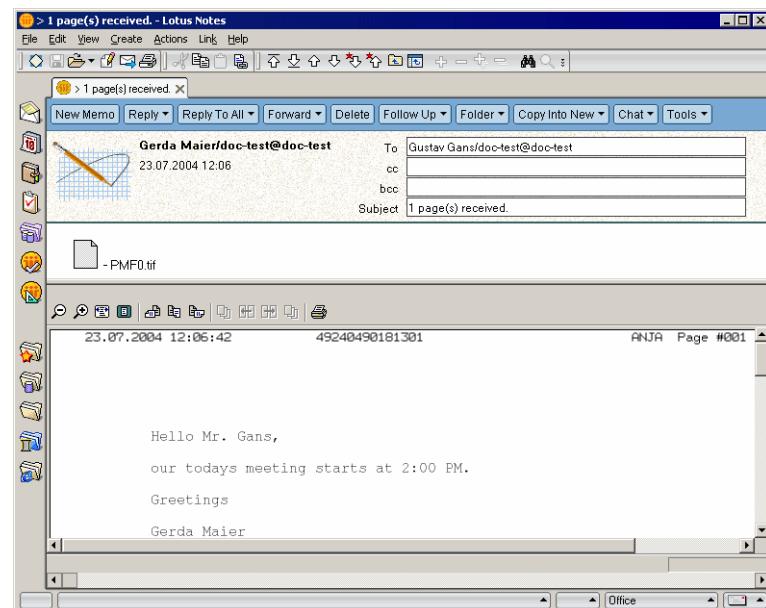
The following table shows all operating elements of the fax viewer.

Menu option	Description
Zoom In	Enlarges the fax representation step by step. Fax enlargement is performed in 50 % steps referred to the basic value (maximum 11 steps).
Zoom Out	Minimizes the fax display stepwise. Scaling down the fax is performed in 50 % steps with reference to the basic value (maximum 11 steps).
First Fax Page	The display shows the first fax page of a multipage fax document (only active with multipage fax documents).
Previous Fax Page	Moves back to the previous fax page in a multipage fax document (only active with multipage fax documents).
Next Fax Page	Moves forward to the next fax page in a multipage fax document (only active with multipage fax documents).
Last Fax Page	Skips to the final fax page in a multipage fax document (only active with multipage fax documents).
Fit to Width	Adjusts the fax to the size of the currently opened window.
Fit whole Page	The fax message is displayed as a complete page. The display is independent of the size of the display window.
Turn over	Rotates the fax by 180°.
Turn right	Rotates the fax by 90° clockwise.
Turn left	Rotates the fax by 90° anti-clockwise.
Print	Prints the fax document.

2.6 Sending SMS Messages

How to send an SMS message:

1. Start the Lotus Notes e-mail client.

2. Select **New SMS** in the **Create > Unified Messaging** menu. The mail extension for SMS message transmission is opened in a new window.
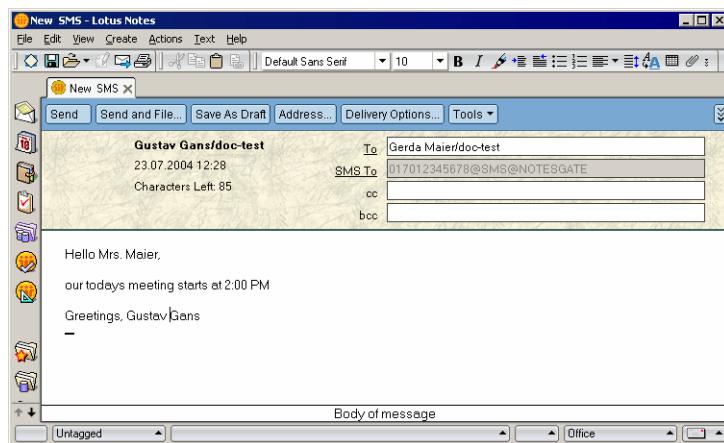
3. To select a recipient click the **Address** button. The address book opens.

4. Select a recipient form the list on the left hand side in the address book and click the **To** button. The selected entry is copied to the list on the right hand side of the address book.

5. Via the buttons **CC** and **BCC** you may optionally select recipients who are to receive a **CC copy** or a **BCC copy** of the SMS message. This copy will be delivered as Lotus Notes mail to the recipients.

6. Confirm the selection of the recipient with **OK**. The address book closes.
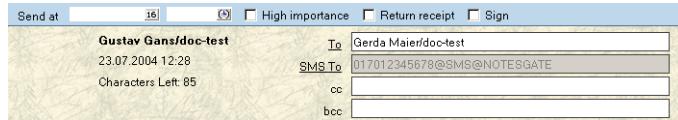
NOTE: Several recipients may be selected at the same time for an SMS message.
You can also manually enter an SMS number in the **To:** address field (if e.g. a recipient does not exist in the address book).

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7. Enter your message in the **text entry field**.

8. After entering your SMS message you can immediately transmit it to the specified recipient by enabling the **Send** button.

Optional settings:

The following table describes additional settings and send options that you can use for the transmission of the SMS message.

Option	Description
Icon 	Clicking this icon adds the following functions to the header of the SMS send form: • The **Characters Left** display shows how many characters are left for an SMS text. • If the SMS message is not to be sent immediately, you may set a send date and a send time with the **option fields** below **Send at**. • You may set the SMS message to **High Importance** and request a **Return receipt**.
Buttons **Delivery Options** and **Tools**	These buttons provide additional send parameters Lotus Notes supplies by default. Hints to their usage can be found in the Lotus Notes help.

2.7 Voice Messages

2.7.1 Sending a Voice Message

How to send a voice message:

1. Start the Lotus Notes e-mail client.

2. Select **New Voicemail** in the **Create > Unified Messaging** menu. The mail extension for voice message transmission opens.
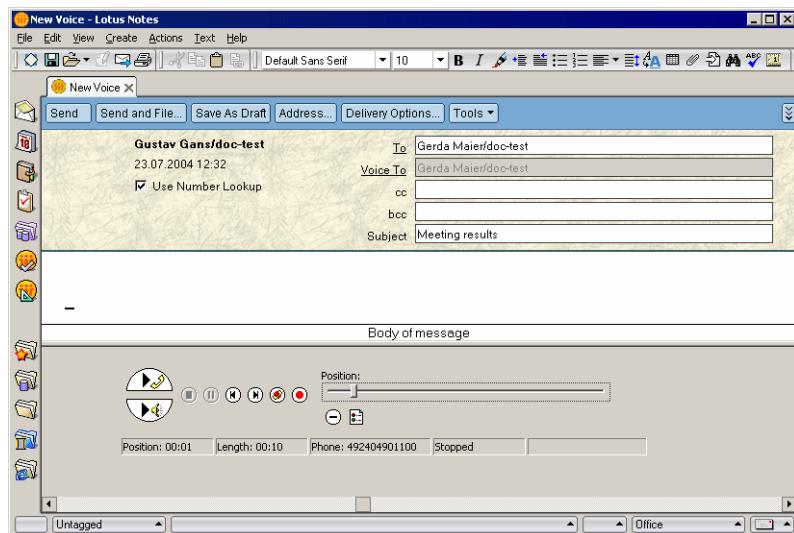
3. To select a recipient click the **Address** button. The address book opens.

4. Select a recipient form the list on the left hand side in the address book and click the **To** button. The selected entry is copied to the list on the right hand side of the address book.

5. Via the buttons **CC** and **BCC** you may optionally select recipients who are to receive a **CC copy** or a **BCC copy** of the voice message. This copy will then be delivered to the recipients as Lotus Notes mail with an attached voice message (file attachment).

6. Confirm the selection of the recipient with **OK**. The address book closes.

NOTE: Several recipients may be selected at the same time for a voice message.
You can also manually enter a recipient address in the **To:** address field (if e.g. a recipient does not exist in the address book).

7. You cannot enter a message text in the text entry field of a voice message.

8. Under the text entry field you find the **voice message operating unit** that provides the following functions:

Function	Description
Recording a message via telephone	Icon to record a voice message via telephone. **Note**: A voice message can only be recorded via the individual workstation telephone (**My Telephone Number**) if the telephone is controlled from this graphic user interface.
Recording a message via microphone	With integrated sound card and attached microphone a voice message can be recorded by clicking this icon.
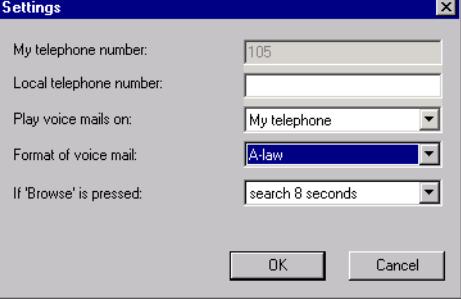
9. Start recording with one of the buttons described above and record your message.

10. Finish recording a voice message via the **Stop** button.

11. After having successfully recorded a message you can use the following operating elements:

Function	Description
Playback via Telephone	Voice message playback via telephone No matter which medium you employ to play back the message, **Position** displays your current position in the tone document (in relation to the entire recording time). The whole duration as well as the temporal position and the current status of the playback procedure is displayed in the window's status portion (under the operating elements). Position: 00:00　Length: 00:00　Phone: 4924049C Stopped **Note**: A voice message can only be played via the individual workstation telephone (**My Telephone Number**) if the telephone is controlled from this graphic user interface.
Playback via Soundcard	Voice message playback via the PC's soundcard. The prerequisite is a soundcard implemented in the PC with attached loudspeakers.
Position slider Position:	Moving the **Position** slider with the mouse enables you to skip to an estimated position in the voice message. By means of the **Position** and **Length** status displays you can relatively precisely head for a certain position in the message.
Stop	Stops message playback and skips to the start of the message.
Pause	Interrupts voice message playback. To continue press one of the two **playback** icons.
Skip to the beginning of the message	This icon is used to get back to the start of the message after playback was interrupted or completely accomplished.
Skip to the end of the message	With this icon you may quickly skip to the end of the message (e.g. if you would like to attach a voice comment).

Function	Description
	Enabling this icon opens the **Options** window in which some voice mail playback parameters can be altered.
Telephone number:	This **entry line** displays your telephone number provided you have a telephone at your workstation and the telephony functions are installed.
Local telephone number:	In this **entry field** you may specify the telephone number of a connection only temporarily used.
Play voice mails on	This option allows switching to the telephone intended for voice message playback. You can either listen to the mail by means of your individual workstation telephone (**telephone number**) or you can put out the message via the device that you have specified under **Local telephone**. **Note**: A voice message can only be played via the individual workstation telephone (**My Telephone Number**) if the telephone is controlled from this graphic user interface.
Voicemail format	Via the combination field of the voice format you can enter the coding for ISDN voice messages of your country. In Europe **A-Law**, in the U.S. mostly **µ-Law** is used.
If 'Browse' is pressed	Here you can set the size of the steps for fast-forwarding or rewinding the voice message.
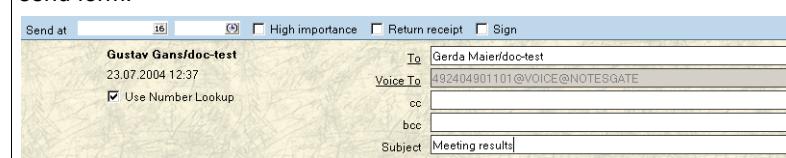
12. Press the **Send** button to immediately start voice message transmission.

Optional settings:

The following table describes additional settings and polling options that you can use for retrieving a voice message.

Option	Description
Icon	Clicking this icon adds the following functions to the header of the voice send form: • The option **Use Number Lookup** controls whether the message is to be sent via the XPR server (activated) or as a Lotus Notes message (deactivated). If the option is activated, a selection window is displayed. Here you can select a phone number as address for the message that is to be sent. – **IMPORTANT**: If you want to use the VM2TXT feature (voicemail to text), you must activate the option **Use Number Lookup** and select a phone number in the displayed window. • If the voice mail is not to be sent immediately, you may set a send date and a send time with the **option fields** below **Send at**. • You may set the voice message to **High Importance** and request a **Return receipt**.
Buttons **Delivery Options** and **Tools**	These buttons provide additional send parameters Lotus Notes supplies by default. Hints to their usage can be found in the Lotus Notes help.

2.7.2 Voice Message received

Received voice mails are opened in a window where you can use additional functions for playing them.

NOTE: If you are in a VPIM environment, you will receive two voice mails. One of them includes the originator name, the other one the actual message. XPR links these two voice mails to one single voice mail you may listen to.

The message view is divided into two parts when the voice message is opened. In the top half the received message is inserted as mail attachment. With a right-click on the mail attachment you can open the voice message in an external sound playback program (e.g. Microsoft MediaPlayer).
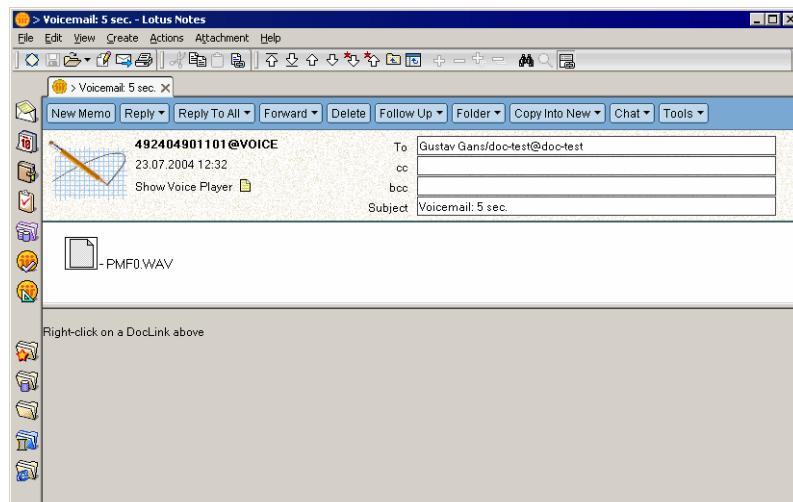
If you click the link **Show Voice Player** in the **message header**, a **voice mail operating area** is displayed in the bottom half of the message view.

With the help of this operating section you can listen to the received message. The operation is described in Section 2.7.1, "Sending a Voice Message", on page 24.

NOTE: Prerequisite for playback of a voice message via the **voice message operating section** is the installation of the ActiveX client components (see *administration manual of the Lotus Notes Gateway*).
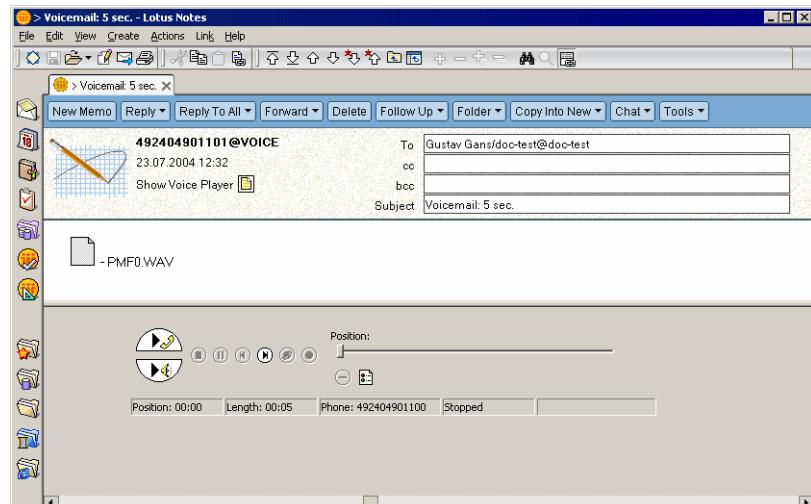
NOTE: If you want to control a telephone from this graphic user interface to play a voice message, you can only use the individual workstation telephone (**My Telephone Number**) for this purpose.

2.8 Answering and forwarding received Messages

All received messages can be answered and forwarded using the Lotus Notes mail extensions. Depending on the configuration of the mail extension the following reply and forward options are available **for all Unified Messaging message types**:

• Reply

• Reply with log

• Forward

• Reply to all

• Reply to all with log

NOTE: Information on the respective reply and forward options can also be found in the Lotus Notes help.

To **reply to** or **forward** a received **message** you need to **select** it in the inbox and choose the desired option in the **Create** > **Unified Messaging** respectively **Create** > **Unified Messaging** > **Other...** menu.

A new message form opens. Here you can create the message as described in Section 2.2, "Sending Fax Messages", on page 14 to Section 2.7, "Voice Messages", on page 24.

2.9 Sending Messages without Mail Extensions

If the Lotus Notes mail extensions are not installed in your Lotus Notes system, you can also send your messages using the standard Lotus Notes e-mail client. Instead of an e-mail address you need to enter a special address format (XPR Lotus Notes address) in the **To:** address line for this purpose.

2.9.1 Structure of an XPR Lotus Notes Address

An XPR Lotus Notes address establishes the connection between the Lotus-Notes-e-mail system and the XPR system. In order to enable sending messages with different formats (e.g.fax, SMS) from Lotus Notes to the XPR system, Lotus Notes addresses the XPR via a so-called foreign domain.

An XPR Lotus Notes address must thus be structured in a way that in addition to the user information (user name or telephone number) the name of the message format used and the foreign domain name are contained. The following address format is used:

`<User>@<Message Format>@<Foreign Domain>`

In the "User" address portion enter a unique user information such as a telephone or fax number. As "message format" the following services are available with the XPR:

*   FAXG3 (analogue fax),

*   FAXG4 (digital fax),

*   FAXG3REV (fax polling),

*   SMS (short messages) and

*   VOICE (voice messages).

The name of the "Foreign Domain" differs depending on the installation. Ask your system administrator for the domain name.

2.9.2 Sending Messages with the Lotus Notes e-mail Client

This chapter explains on the basis of an example how you can send messages using the XPR Lotus Notes address.

Example: Sending messages with XPR Lotus Notes address

You would like to send a fax message to the user *John Q. Public* via your Lotus Notes e-mail client. Mr John Q. Public has the fax number 02404/ 123456. Since a fax message is to be sent, FAXG3 is used as message format. The foreign domain is called NOTESGATE. Proceed as follows:

1. Start the Lotus Notes e-mail client.

2. Press the **New Memo** button to generate a new message.

3. Enter the following address in the **To:** field:

   ```
   02404123456@FAXG3@NOTESGATE
   ```
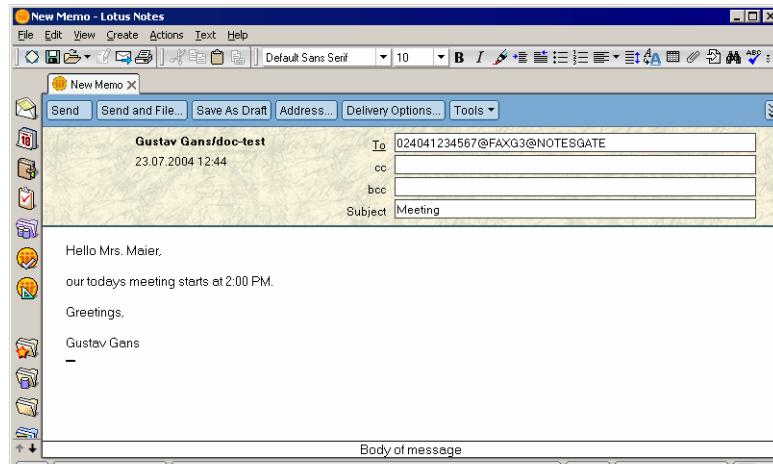

4. Type your message and then click the **Send** button to start sending the message immediately.

2.10 Computer Telephony Integration (CTI)

The term CTI comprises all functions that enable a logical linking of data and telephone services. The key to this is the connection of a computer workstation to a telephone. A simple case of a CTI application can be e.g. starting a defined PC application when a call arrives at the telephone terminal device. This can be extended at will, so that an incoming call can be linked to more complex, computer-based workflows, for example reading caller-specific information out of a database with subsequent preparation and representation.

CTI works the other way round just as well. A good example is the setup of a communication connection to a telephone user from a computer application. The most simple form of such an application is a so-called dialer, which establishes a phone connection with the entered number at the push of a button.

2.10.1 CTI Functions

CTI provides different features for controlling and monitoring PBX systems and telephone devices. The most important ones are:

- Control of telephone devices (accept call, establish connection, show display information etc.)

- Control of telecommunication connections (initiating connection setup, conferences, "park calls", "alternate" etc.)

- Creation of CTI journals, to provide a complete telephone activities list.

Two options are available for using CTI features:

- SimpleDialer

- optiClient 130

2.10.2 SimpleDialer

The SimpleDialer offers the option to establish a connection via telephone under Lotus Notes.

If the dialer in Lotus Notes is started, you first need to enter the phone number of the conversational partner and then click the **Dial** button. With the **Pers. Address Book** respectively **Public Address Book** button you can select a conversational partner from a Lotus Notes address book.
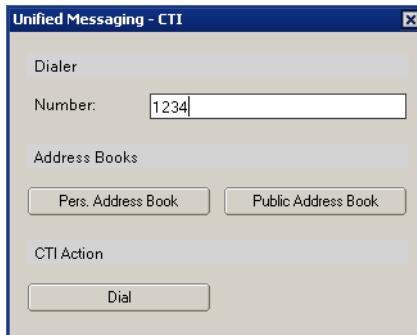
Now a Lotus Notes mail with the connection request data (phone numbers of the originator and recipient) is sent to the Lotus Notes APL. The Lotus Notes APL forwards this connection request to the CTI Light script. The script processes the connection request and starts the connection setup.

During the setup of the conversation connection first the originator is called. If the originator picks up the receiver, the script calls the recipient. After the recipient has also picked up his receiver, the two conversation partners are switched together.

Because of the aspect that the connection request is sent via Lotus Notes mail, the connection setup may take some time. Therefore, this type of connection setup is most suitable for intranet connections. Features such as hold, consultation calls, alternate and conference are not possible with the SimpleDialer. The conversation is finished simply by putting down the receiver.

2.10.3 optiClient 130

optiClient 130 is based on Lotus Notes and extends or uses its functionality.

The most important functions are listed below.

- **Logging calls**
  A call dialog opens automatically for each inbound and outbound call. The call dialog contains the date and time of the call as well as the name of the calling/called party or the phone number. You can enter notes for each call. You can specify whether a journal item and/or a task are to be created in Lotus Notes for each call.

- **Initiating calls via Lotus Notes**
 optiClient 130 enables you to initiate calls from within Lotus Notes. Select a contact, journal entry, task, e-mail or an appointment and push the icon in the toolbar.

- **Accepting calls**
  optiClient 130 enables you to accept calls that arrive at your telephone. This is not possible for other telephones.

- **Switching telephone conferences**

- **Using convenient telephony functions**
  You have access to typical telephony functions such as alternate, conference, forwarding, etc.

- **Managing List of missed calls**
  If the caller hangs up without you having accepted the call, optiClient 130 closes the call dialog again and generates a task item. The last six calls of that type are also displayed in the *Missed calls* context menu linked to the telephone icon so that you can directly initiate a callback. You can also generate a journal item instead of a task item.

- **Picked up calls: Sending notification**
  If you pick up a call that was directed to another user (telephone system group function or call forwarding), optiClient 130 opens a call dialog that displays the e-mail address of the originally called subscriber and the name of the caller. You can also generate a journal item instead of a message.

optiClient 130 communicates with the XPR server via LAN. Via a CTI connection the server controls the PBX where the telephones and the PSTN (Public Switched Telephone Network) are connected to.
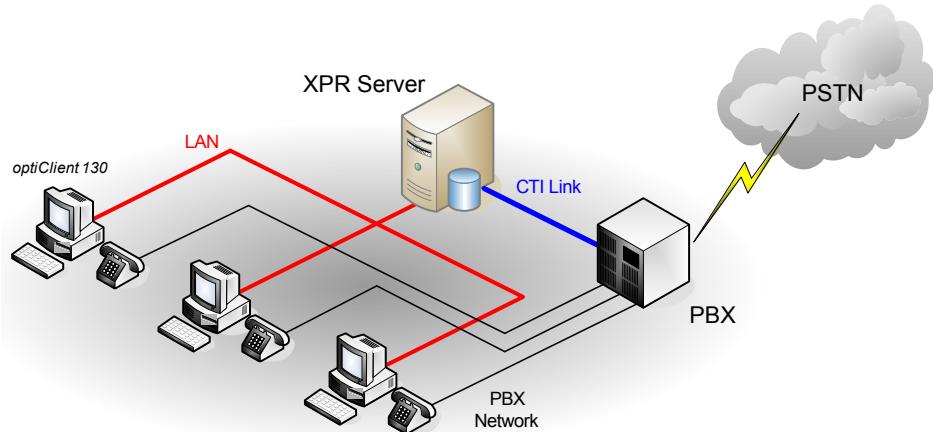
For further information about optiClient 130 please consult the administrator documentation and the operating instructions of the *optiClient 130*.

3 Conference Extensions

3.1 General Considerations

The conference extensions facilitate scheduling and monitoring conferences. There are the following conference types:

- **Web conferences**
  This type of conferences is exclusively staged using an internet connection. The Web Conferencing Tool is deployed for this purpose. Web conferences describe the collective use of programs and documents during real-time computer conferences. Web conferences enable the conference participants to display each other's desktop if allowed by the user. In this way all other conference participants can see the same image, knowing what everybody is on about. Documents and the entire desktop can also be shared for editing. Using the additional features you can discuss and illustrate matters. These additional features include, for example, the chat and whiteboard function. In case of web conferences the location in which the conference participants are situated is irrelevant. You merely need a PC with internet access and possibly a telephone. This ensures a high degree of flexibility and saves expenses for long journeys, accommodation etc. Since all session data is transmitted encrypted (256-Bit-AES encryption), sensitive data can be transmitted as well.

- **Voice conferences**
  This type of conferences is exclusively staged via telephone.

- **Combined voice/web conference**
  In case of this conference type, a voice conference is staged simultaneously to a web conference. It is thus a web conference with additional voice connection.

- Monitoring a scheduled and initiated telephone conference via the OpenScape Web Client.

NOTE: The administrator can use privileges to deny you deploying conference features. In this case you receive a corresponding message.

NOTE: Please remember to inform conference participants who do not have an e-mail address about the conference data by other means of communication.


3.2 Setting up a Conference

1. Open your mailbox.

2. Click the **Mail** button.

3. In the menu select **Switch to Calendar**.
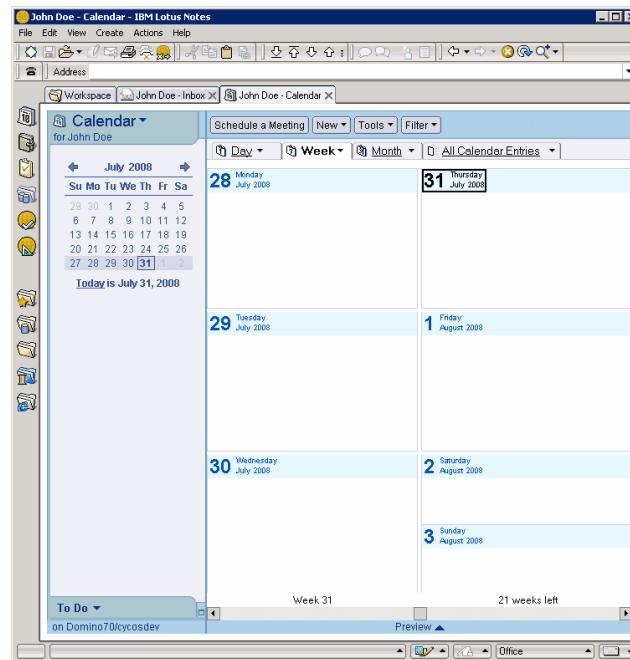
4. Click the **Schedule a meeting** button.
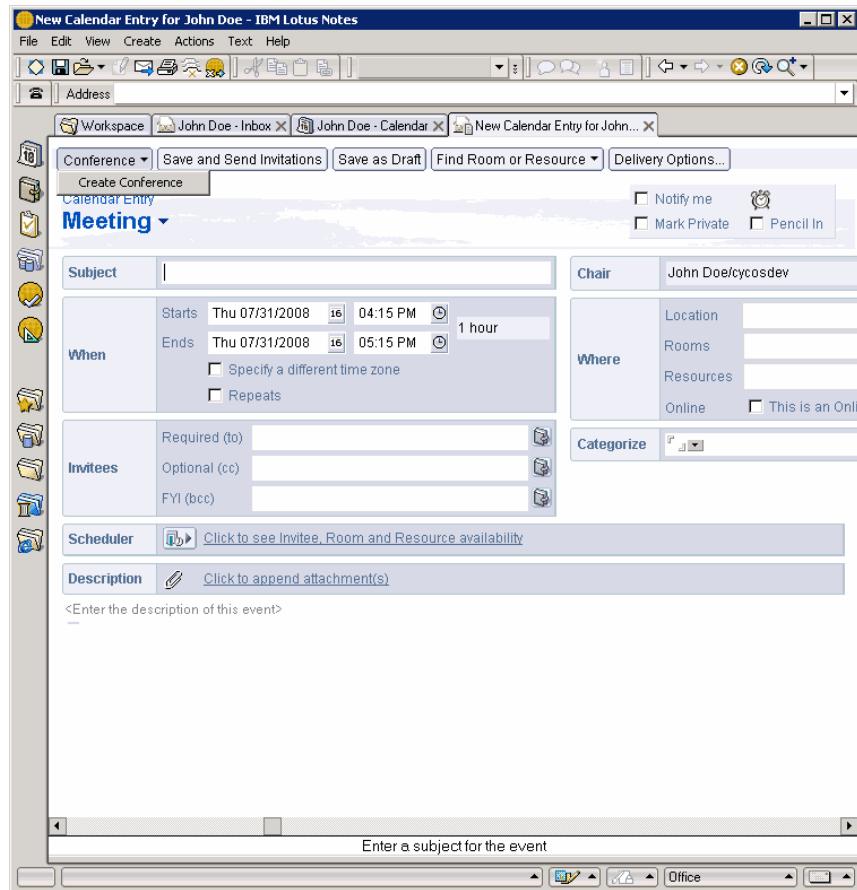
5. Enter a subject for the conference in the **Subject** field.

6. In the **Starts** field specify the date and start time of the conference.

7. In the **Ends** field specify the date and end time of the conference.

8. In the **Required (to)** field enter the names of the persons who you want to invite for the conference.

9. In the **Optional (cc)** field enter the names of the persons who you want to optionally invite for the conference.

10. Click on the **Conference** button and select **Create Conference** in the menu.
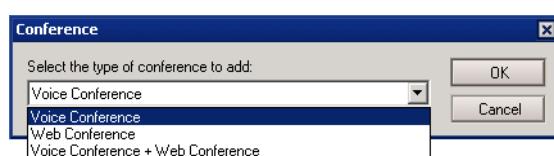
If an error message appears, saying that no connection to the conference server can be established, check whether the **XPR Service Provider Service(MspSvc)** operates.

Select the desired conference type and click on **OK**.

11. Depending on the conference type, properties are automatically entered in the conference entry:

- Web conference

    – URL: Doubleclick this URL for joining the web conference.

- Voice conference

    – Conference type

    – Time of creation

    – Voice conference PIN: With this PIN you authenticate yourself as conference member.

    – Voice conference bridge number: This is the phone number under which you can log on to the conference.

- combined voice/web conference

    For a combined voice/web conference all points of a voice conference and all points of a web conference are entered.

12. Click on the **Save and Send Invitations** button.

    The conference document is closed and displayed in the calendar.

13. A user invited for a conference can see the invitation with the ✉ icon in the inbox. This mail contains the conference properties.

14. The invited user can accept the invitation with a click on the **Respond** button and selecting the **Accept** menu option.

15. The accepted invitation appears in the inbox of the invited user with the ✉ icon.

16. The accepted invitation appears in the inbox of the conference creator with the 🖰 icon.

17. Please obtain from Appendix A, "Web Conference Client" how to operate a web conference. You join a web conference by entering the web address of the client (see step 11 on page 42) in a browser.

3.3 Editing a Conference

1. Open your mailbox.

2. Click the **Mail** button.

3. In the menu select **Switch to Calendar**.

4. Open the conference entry you want to modify.

5. Customize the conference entry.

6. Click on the **Conference** button and select **Update Conference** in the menu.
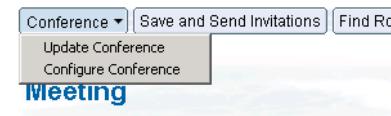

7. Here you select the conference type, which need not be identical with the current conference type, and click on **OK**.

   The current conference properties are added under the previous conference properties.

8. Click on the **Save and Send Invitations** button.

   If you have changed the conference time, the following dialog appears.

   Click on **No** if you do not want to attach comments to the message.

9. Each user invited for the conference receives a mail with information about the conference update, indicated by the 🔵 icon in the inbox.

10. If the conference has been rescheduled, each invited user receives a mail with information about the conference update, indicated by the following 🔄 icon in the inbox:

11. If the invited user wants to accept the modification, he/she clicks on the **Respond** button and selects the **Accept** menu option.

12. The accepted modification appears in the inbox of the conference creator with the 👍 icon.

3.4 Deleting a Conference

1. Open your mailbox.

2. Click the **Mail** button.

3. In the menu select **Switch to Calendar**.

4. Click with the right mousebutton on the conference to be deleted.

5. Select the menu option **Delete**.
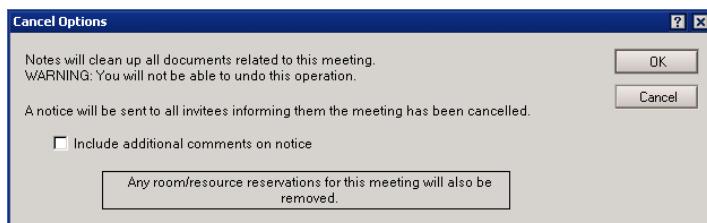
With a click on **OK** you delete the conference document. A callback will then be created and the conference is automatically deleted in the XPR.

Click the **OK** button.

6. Each user invited for the conference receives a mail indicated with the ✖ icon in the inbox.

3.5 Configuration of a Conference

1. Open your mailbox.

2. Click the **Mail** button.

3. In the menu select **Switch to Calendar**.

4. Open the conference entry.

5. Click on the **Conference** button and select the **Configure Conference** respectively **Floor Control** menu option.

6. A browser with the current conference data opens.

3.6 Calling into a Conference

IMPORTANT: You can only call into a conference if the *OpenScape Web Client* is installed and started.

NOTE: A voice conference is started five minutes before the scheduled conference start. This is to stop conference participants from dialing into the voice conference before the scheduled start.

---

1. Open your mailbox.

2. Click the **Mail** button.

3. In the menu select **Switch to Calendar**.

4. Open the voice conference or voice/web conference entry.

5. Click on the **Conference** button and select the **Call Into Conference** menu option.

   The phone number of the conference bridge is called.

   NOTE: In an ongoing voice conference you can click on the **Call Control** option in the conference menu to open the *OpenScape Web Client*. You can then lock the conference, mute participants, remove participants etc.

   ---

6. If a web conference is to be started as well, doubleclick the URL in the invitation text (see step). You need not enter a session ID or password.

3.7 Starting a Web Conference

Only the creator of a web conference can start it. He/she needs to click on the **Start Web Conference** button after the scheduled web conference start. This button is not yet visible if the web conference creator opens the conference entry before the scheduled web conference start. Close the entry and reopen it after the scheduled web conference start.

3.8 Conference Overview

Click in the Lotus Notes toolbar on the following icon to open the conference overview:

Via this button you immediately reach the **Conferences** dialog of the *OpenScape Web Client*. In this dialog you receive an overview of all scheduled telephone conferences.

NOTE: In this dialog you can view the conferences but you cannot edit or delete them.

You find operating instructions for web conference tool in Appendix A, "Web Conference Client".

4 Settings for CTI and Unified Messaging with Lotus Notes 6.x

In the folder **Tools > Unified Messaging** diverse parameters for the Unified Messaging features can be set in the Lotus Notes e-mail client.
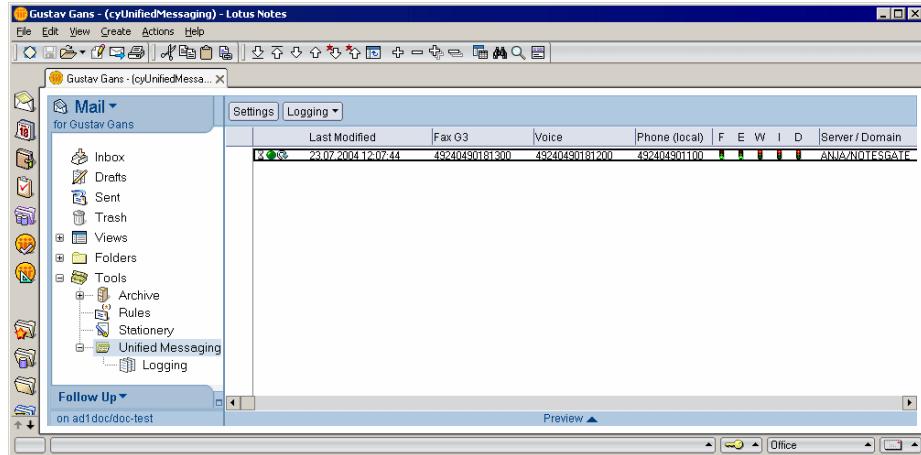
In the **Unified Messaging** folder is a copy of your person document that exists in the XPR administration database. You can open your person document via the **Settings** button.

In the **Logging** folder a logging document is stored that logs all activities in your mail database and your person document. The logging scope can be configured (see Section 4.1, "Logging", on page 57). A **double-click** on a logging document opens it for viewing.

NOTE: Your system administrator determines in the XPR administration database which parameters you may edit in your person document. Therefore, it is possible that you cannot modify all the parameters described here.

NOTE: You need to have administrator privileges for displaying CTI settings.

4.1 Change Unified Messaging Settings

In the open person document the **Basics**, **Standard Messaging** and **Logging** tabs are displayed. The following parameters can be set in these tabs, provided that the system administrator authorized you to.

NOTE: An icon next to the parameter shows whether you are authorized to change this parameter. A **green tick** means you are allowed to modify the parameter. A **red cross** means you are not authorized to modify this parameter. If no icon is displayed in front of a parameter, the parameter may never be modified.

Basics

The **Basics** tab serves exclusively for your information. No settings can be changed here.
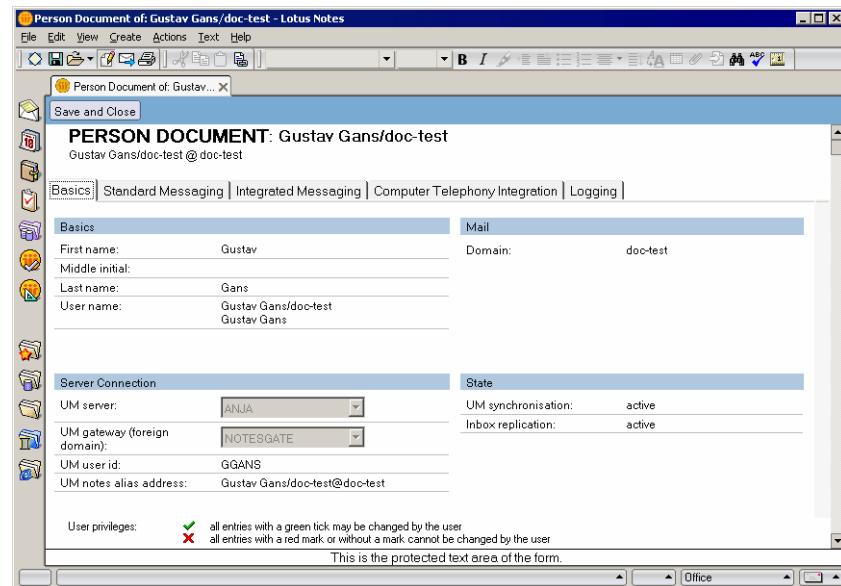
Standard Messaging > Basics
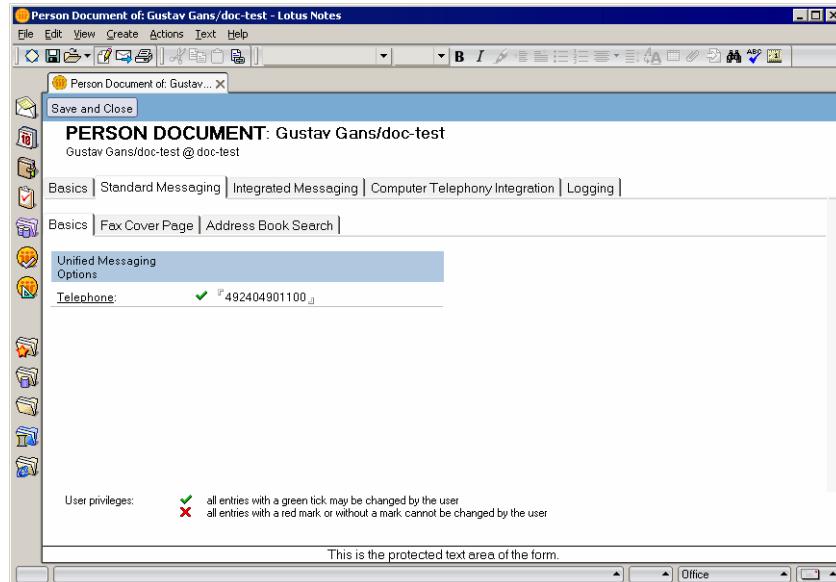
Unified Messaging Options area:

Option	Description
Telephone	Here you can set the phone number under which you can be reached.

Standard Messaging > Fax Cover Page > Cover Page
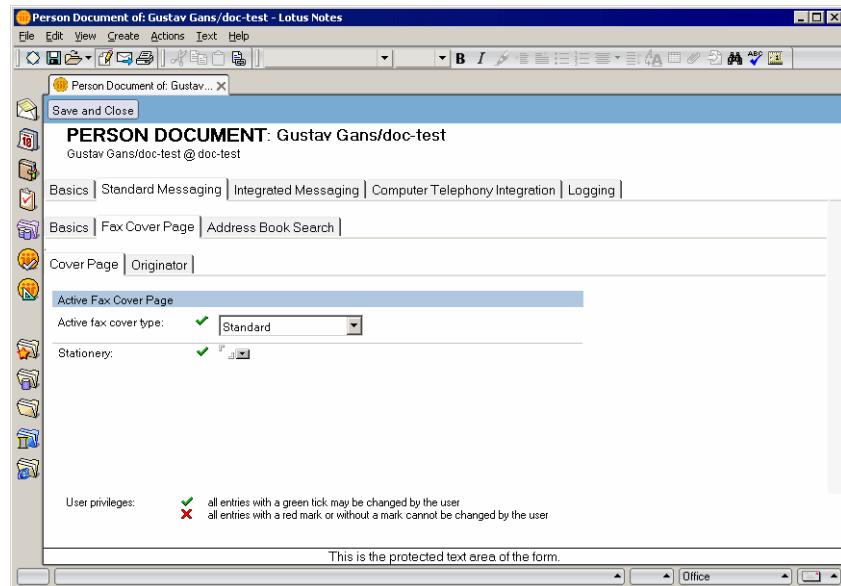
Active Fax Cover Page area:

Option	Description
Active fax cover type	Here you can select which fax cover page you would like to use for your fax messages. • **No Fax Cover Page** • **Standard Fax Cover Page** One or several fax cover pages the XPRsystem provides. • **Lotus Notes Fax Cover Page** One or several fax cover pages Lotus Notes provides.
Stationery	Depending on the selected **Fax cover type** you can set the name of the stationery that is to be used here.

Standard Messaging > Fax Cover Page > Originator
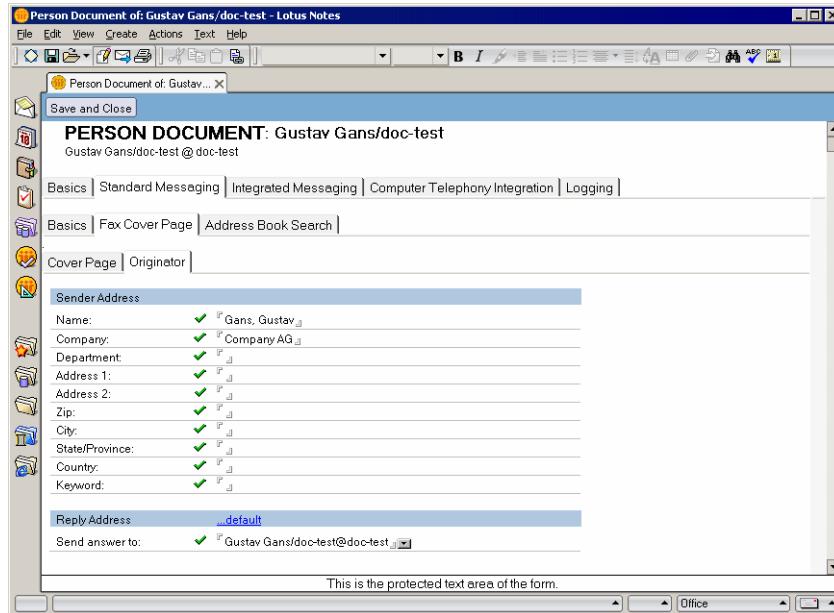
In the fields of the **Originator** tab user information is stored that is set in the corresponding fields of the XPR send form and are thus available for the fax cover page. Fields: **Name, Company, Department, Address line 1, Address line 2, Zip, City,State, Country and Keyword**.

Reply Address area:

Option	Description
Send answer to :	If you want to send the send notification or the error report to an address other than the originator address, you can enter it here.

Standard Messaging > Address Book Search
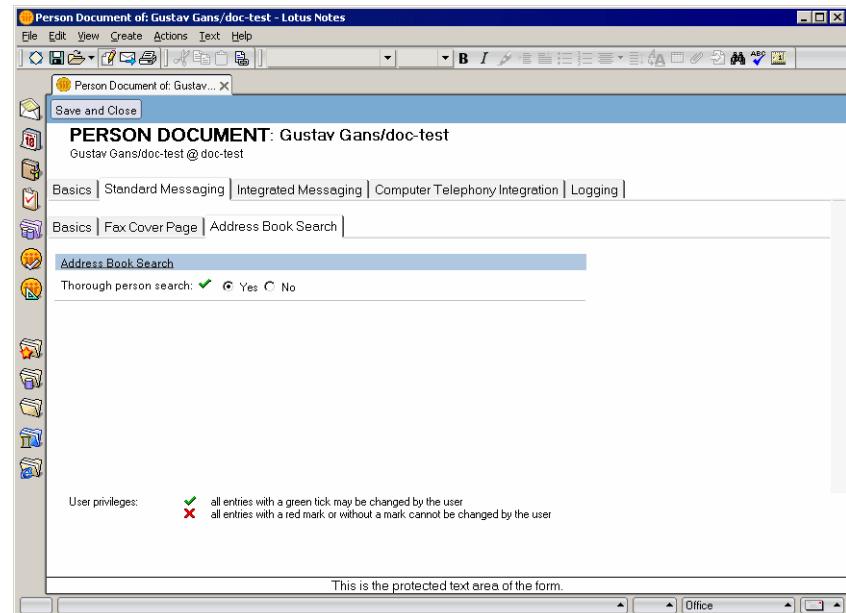
Address Book Search area:

Option	Description
Complete Person Search:	Activates or deactivates the search for additional recipient information in all configured address books (e.g. Lotus Domino directory).

Integrated Messaging
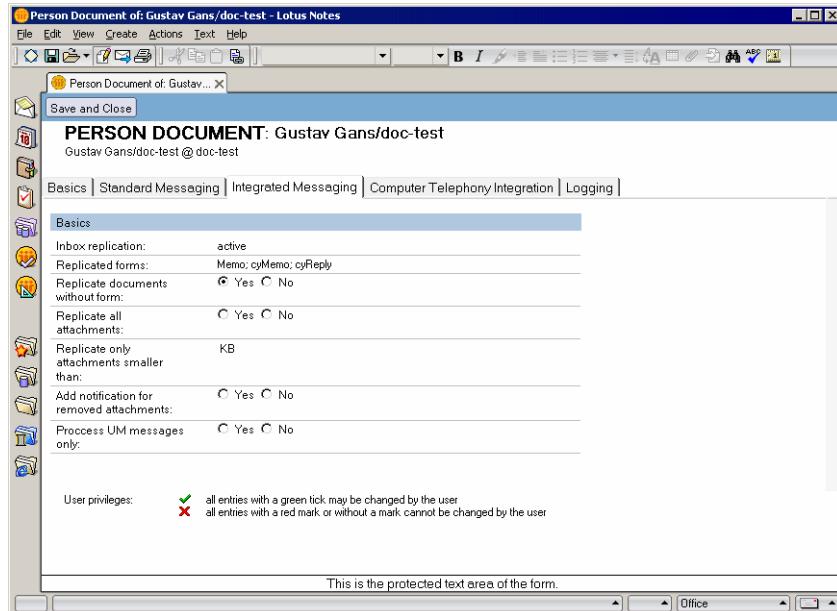
Basics area:

| Option	Description
Inbox replication	Shows whether the inbox replication is **activated** or **deactivated** for this user data record.
Replicated forms	All Lotus Notes forms listed here are considered in the Integrated Messaging context. This setting concerns the XPR dispatcher agent functionality in the user's mail database.
	Only documents containing one of the listed form names in the 'form' field are replicated to the XPR server. Via the **Add Default** button the default values can be loaded. The default values are: **Memo**, **cyMemo**, **cyReply**.
Replicate documents without form:	With this option you can determine whether documents can be replicated to the XPR server with or without Lotus Notes form.
Replicate all attachments:	Activates / Deactivates replicating mail attachments in messages.
Replicate only attachments smaller than (kilobyte):	Definition of the file size for mail attachments to be replicated.
Add notification for removed attachments:	Inserts a notification about the removal of a mail attachment into a received message.
Process UM messages only:	Determines whether all messages or only Unified Messaging messages are to be replicated.

Computer Telephony Integration (CTI)

NOTE: You need to have administrator privileges for displaying CTI settings.
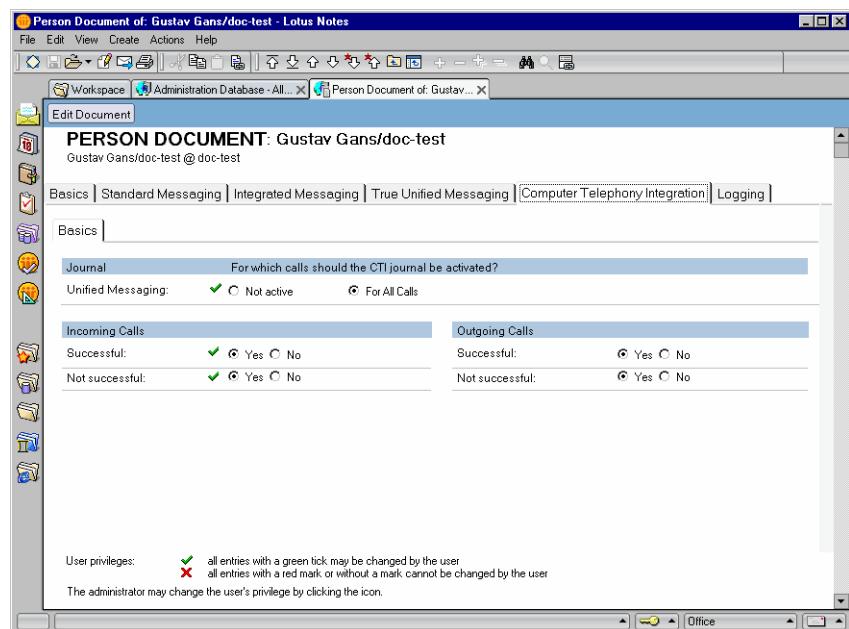
Basics tab

On this tab you can perform settings for the CTI journal mails.

Journal area

In the header section of the tab you can disable the transmission of call information with the **Not active** option respectively activate it with the **For All Calls** option.

According to the settings chosen, further settings for the information to convey can be configured in the following fields.

Option	Description
Incoming calls	Successful: **Yes /No** Not successful: **Yes /No**
Outgoing calls	Successful: **Yes /No** Not successful: **Yes /No**

Logging
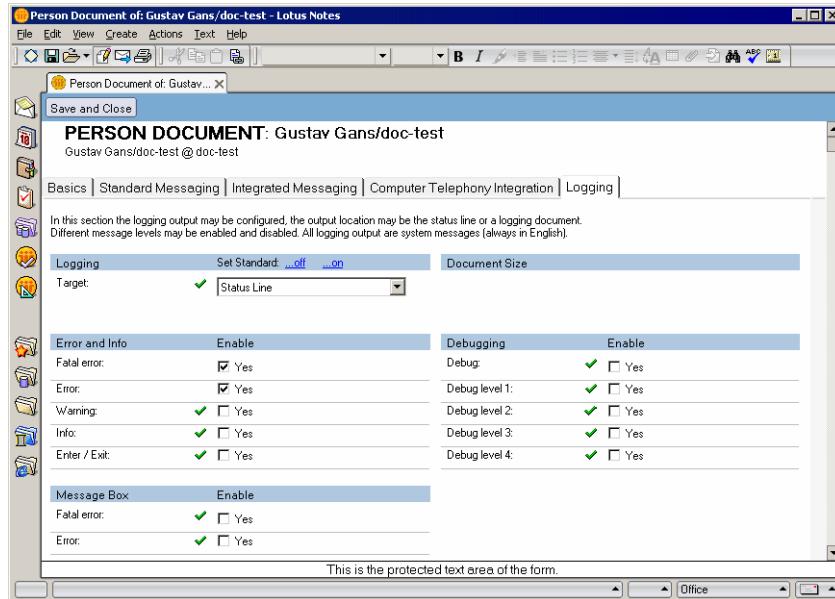
Logging area:

Option	Description
Target:	• **Document in Database** A logging document is created and stored in the XPR administration database. • **Status Line** Logging output is logged in the status line. No logging document is created.
Document type	If **Document in Database** has been selected as the target, you may determine here if a logging document is to be created per **Action** or **per Person**. You may also create **one document for all**.

Via the option **Set Standard** all entry fields can be preset with default settings. The link **...from** performs default logging. The **error messages** (**Fatal Error** and **Error**) are logged in the status line. The link **...to** performs default logging The **Error messages**, **Warnings** and **Infos** are logged in a logging document.

In the **Error and Info** section you can determine for which error and info types a logging entry shall be created.

Option	Description
Fatal error	A fatal error that normally finishes the execution of a program. Logging this error type cannot be **deactivated**.
Error	A program error that does, however, not lead to its immediate closing. Logging this error type cannot be **deactivated**.
Warning	A critical program situation that does not directly lead to an error but could cause an error later on. Warnings can be hints for following errors.

Option	Description
Info	Normal program states are logged.
Enter/Exit	Logs the program stack. E.g. entering a sub-function logs an enter message. This logging option can be used for debugging.

In the **Message Box** area you can set which error types are to be displayed in a message window. The message window then shows a system message in English.

The **Document Size** area can only be configured when you have set **Document in Database** as output target.

Option	Description
Number of items	Each logging entry is inserted as rich text field in the logging document. Here you can set how many rich text fields the logging document shall have.
Bytes per item	Number of bytes that are to be used per logging entry. The minimum is 500 bytes.
History capacity	Shows the minimum and maximum capacity of a logging document in kilobyte.

In the **Debugging** area you can determine debug outputs in four steps.

A Web Conference Client

You find information about the Web Conference Client in the *OpenScape Web Collaboration* user guide.

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