

ixi-UMS Mail Server Connector

Installation & Configuration

Onlineversion

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1 Overview

1.1 Requirements

The ixi-UMS-Software can be installed on computers with Windows operating systems only:

- Windows Server 2012
- Windows Server 2012 R2 (64 bit)
- Windows Server 2016 (64 bit) Desktop Experience
- Windows Server 2019 (64 bit) Desktop Experience
- Windows 10 (32 and 64 bit)

- mind. ixi-Framework 7.00
- at least ixi-UMS Kernel 7.00
- Lotus Domino Server
- Microsoft Exchange Server from Version 2010
- any SMTP Mailserver

1.2 What is the ixi-UMS Mail Server Connector?

The ixi-UMS Mail Server Connector is an add-on for the ixi-UMS Kernel that connects to a mail server. The connector is responsible for the delivery of incoming UMS messages: fax, SMS, voice (from ixi-UMS Kernel to the mail server) as well as for the processing of outgoing UMS messages (from the mail server to ixi-UMS Kernel).

The ixi-UMS Mail Server Connector has two primary tasks:

- a) Communication with the mail system via SMTP
- b) Verification of the user and assignment of the recipient number via LDAP query

The ixi-UMS Mail Server Connector can be connected to several different mail systems and LDAP-enabled systems via a number of instances.



The use of multiple instances at the same time is subject to license and fee.

Communication with the mail system

The ixi-UMS Mail Server Connector can be connected to any mail server that supports the SMTP protocol RFC 821.

The mail server must be set up to accept e-mails from ixi-UMS Mail Server Connector and send outgoing e-mails to the ixi-UMS Mail Server Connector.

See "Additional Informations" for sample setup examples for the Microsoft Exchange Server and Lotus Domino mail servers.

User management

The user management includes the assignment of the UMS recipient number and the assignment of rights. User management ixi-UMS Enterprise must be performed in an LDAP-based database.

The required information is requested by the ixi-UMS Mail Server Connector directly to the defined LDAP database. No information is imported or replicated to the ixi-UMS Enterprise system.

The existing database/user management (e.g. Active Directory, Lotus Domino) or the Open LDAP database (ixi-UMS user management) of ixi-Framework can be used.

Active Directory

For user management, a display specifier "ixi-UMS" for the "Active Directory Users and Computers" snap-in is registered on the ixi-UMS computer during installation (if the installation account has sufficient authorization). Only **one** Display Specifier (ixi-UMS-Tab) can be registered on a computer. Each Display Specifier can manage the ixi-UMS users of **one** instance. The instance must be selected during registration.

The Display Specifier "ixi-UMS" can be additionally registered on any computer later.

If a **Microsoft Exchange Server** is used, the user data can be stored in one of the "custom attributes".

If no "custom attributes" are available, any other field can be used or a supplied schema extension can be performed.

Lotus Domino

For [user management in Lotus Domino Server](#) – if the fully integrated user management is to be used – an extension of names.nsf is required. This extends the "\$PersonExtensibleSchema" provided for this purpose with configuration fields for ixi-UMS. The schema extension is started automatically during setup (installed IBM Notes Designer is required) and/or can be started manually after installation.

Optionally, additional options for the ixi-UMS Client Tools can be provided in the Notes client.

ixi-UMS User Management

The [ixi-UMS User Management Console](#) is included with ixi-Framework as an option and can be subsequently installed at any time by reopening the ixi framework setup. All required fields as well as the user creation and administration interface will be installed.

1.3 Licensing

The license for the ixi-UMS Mail Server Connector is controlled via the license key of the ixi-UMS Kernel.

The ixi-UMS Mail Server Connector is multi-instance capable. Multiple instances can always be set up and used individually. Whether the instances can be used simultaneously depends on the ixi-UMS license.

In order to request a test license, please contact Lizenz-UMS@estos.de.

2 ixi-UMS User Settings

Via the ixi-UMS User Portal the HTML page "ixi-UMS User Settings" can be made available to the users. On this page the user can get information about the respective permissions, select the fax cover page, select the report language (in HTML) and enter an individual headline. What is displayed to the user and what options are available to him can be specified in ixi-UMS Portal Server.

The screenshot shows a web browser window with the URL `http://localhost:8890/umsportal/ums-user-preference`. The page title is "ixi-UMS user-portal". The main content area is titled "Your ixi-UMS Components:" and contains a navigation bar with "ixi-UMS User Settings" (active), "Settings", "Help", and "Logoff".

The "Settings" section is divided into three sub-sections:

- Coverpage:** "Specify which coverpage (stored by the administrator on the server) shall be used." A dropdown menu shows "System Default: DE_Mit_Absender". There is an unchecked checkbox for "Always insert coverpage".
- Fax headline:** "Specify the headline that will be printed on the top of the fax during sending." A text input field contains "Firma - Marketing Abt." with a lock icon.
- Settings for Reports:** "Specify the language that is used for send reports and reports for inbound messages." A dropdown menu shows "System Default: German".

The "Rights" section is titled "The Following permissions for sending ixi-UMS messages are effective for you:" and contains four sub-sections:

- Priority:** "Allowed send priority" is set to "normal".
- Sending of fax messages:** "Rights" is "international", "Maximum number of pages per fax" is "60", and "Maximum number of messages per day" is "Unlimited".
- Sending of SMS:** "Rights" is "national" and "Maximum number of messages per day" is "5".
- Sending of voice messages:** "Rights" is "No sending".

Please refer to the manual of the ixi-UMS Portal Server for further information on the settings.

3 Installation

1. An update of a ixi-UMS Enterprise version older than version 7.00 is not possible. Version 7.0 cannot be installed over older ixi-UMS Enterprise versions.

Note:

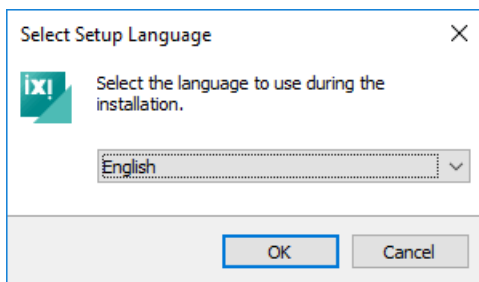
Existing, by older ixi-UMS versions registered, ixi-UMS user data in the LDAP database remain can continue to be used.

Please note:

If the ixi-UMS user data is maintained in the attributes of the ixi-UMS schema extension before ixi-UMS version 6.50, it is recommended to install the new ixi-UMS schema extension and to transfer the data into the new attributes: Extending the Schema - Active Directory and ixi-UMS Schema Migration.

2. Log in with an administrator account. If you set up a services account for the other ixi-UMS Enterprise components (ixi-Framework, ixi-UMS Kernel), please use this account.
3. If you install the ixi-UMS Mail Server Connector on the same computer as the mail server, note that the ixi-UMS Mail Server Connector must have its own free IP address. See also the notes under Additional Information.
4. Install the latest ixi-Framework.
5. Install the latest ixi-UMS Kernel (optionally; can also be installed in a separate machine).
6. Install the latest ixi-UMS Mail Server Connector.

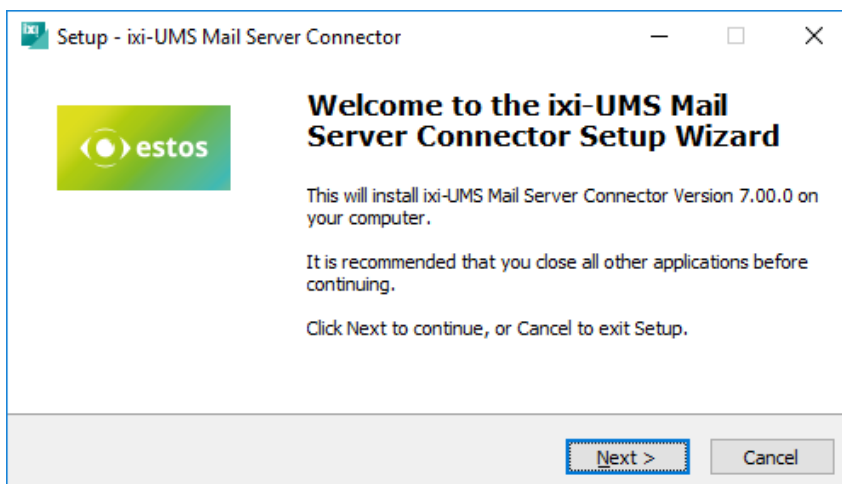
3.1 Select Language



At first, the language for the setup wizard must be selected.

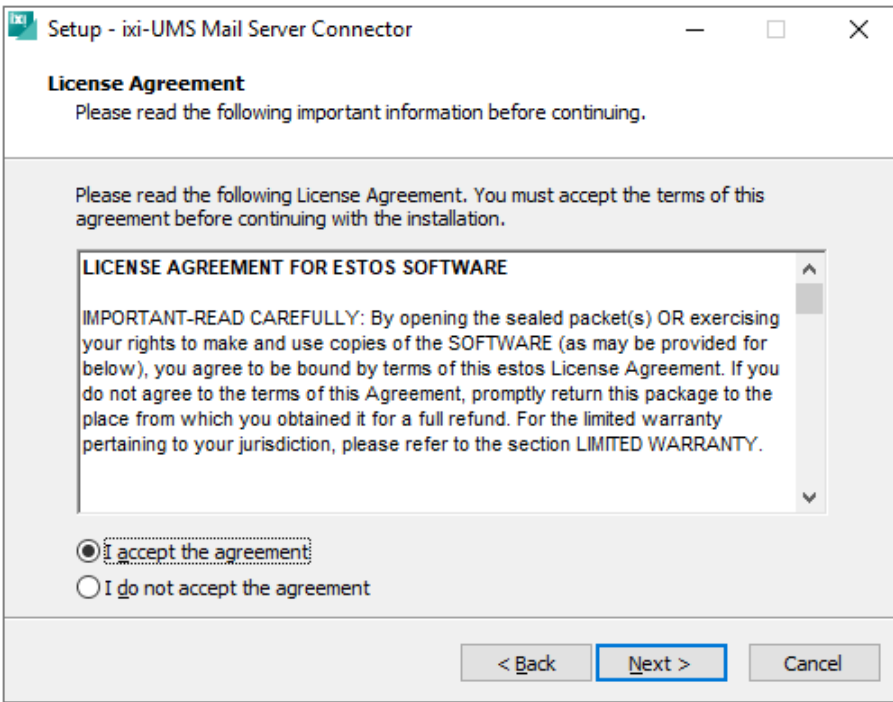
The language for the configuration interface in the MMC can be changed later on.

3.2 Welcome



After the Welcome Screen, you can change the installation folder.

3.3 License Agreement

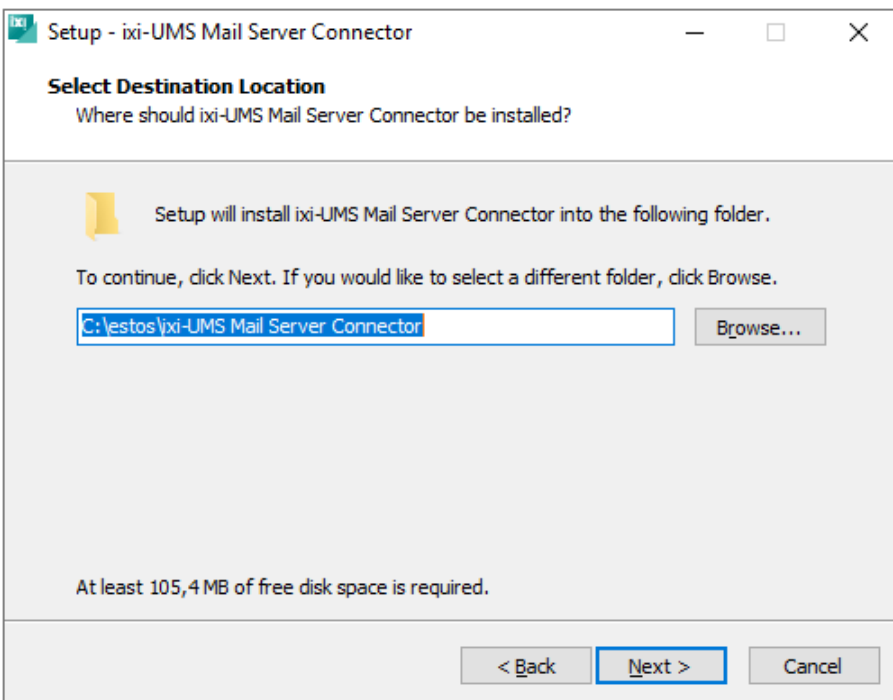


The end user's licence agreement is indicated.

Peruse this carefully and choose "I accept..."

Only then the installation can be continued.

3.4 Choose Destination Location

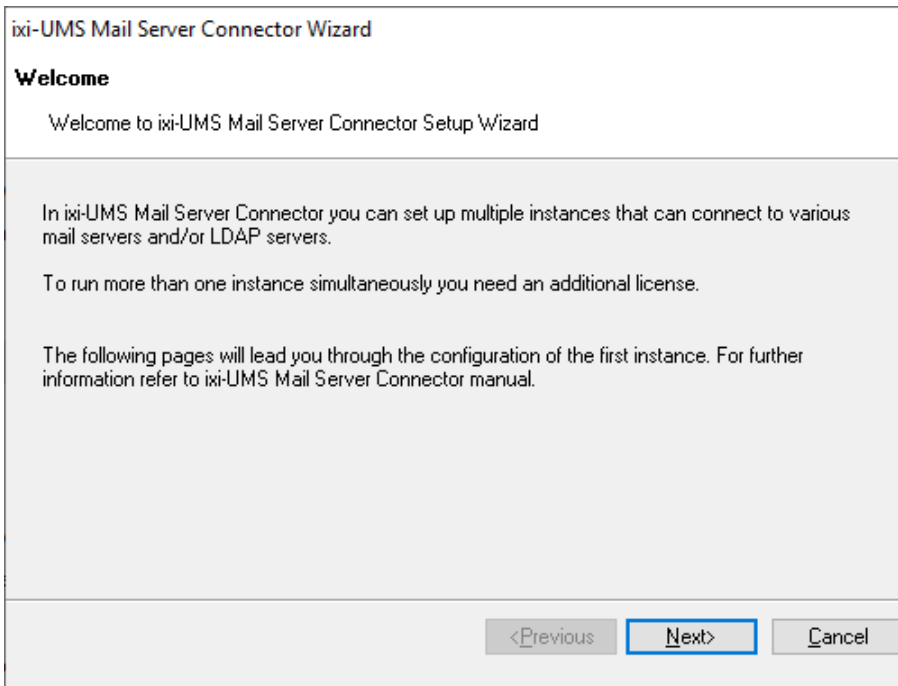


By default, the ixi-UMS Mail Server Connector is installed in the same folder as the ixi-Framework.

ixi-UMS Support recommends that all ixi-UMS components be grouped in a subdirectory. So, in case of problems fast help is possible.

In the next step, all required files are copied to the computer.

3.5 Setup Wizard



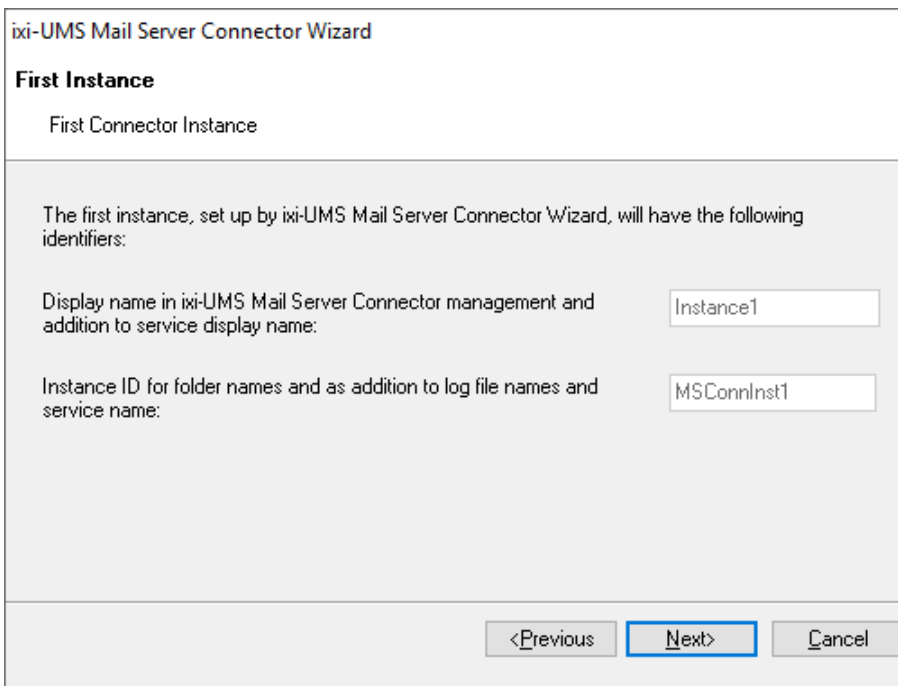
After the copy process is complete, the installation wizard is started.

All required information is queried by the wizard.

3.6 First Instanz

The ixi-UMS Mail Server Connector can manage multiple instances. Each instance needs its own name and directories. During the setup, the first instance with a permanently assigned name is created.

If another [instance is created](#) after the installation, both names must be assigned.



As an extension in the display name of the service and as a display name in the ixi-UMS Mail Server Connector Management, the name **Instance1** is entered.

The name of the instance-ID is **MSConnInst1**. This name is used for the installation directory, connector transfer directories, as a display name in configuration selections in other ixi-UMS products and as a supplement to log files and service name:

After installing the ixi-UMS Mail Server Connector, additional [instances can be created](#) and deleted.

3.7 Select User Management

Via [LDAP query](#) the ixi-UMS Mail Server Connector determines the recipient e-mail address for incoming messages or checks the send authorization for outgoing messages, for example. The query is executed for each incoming and outgoing message. This function only requires "read" access to the database.



The connection data can be changed in the ixi-UMS Mail Server Connector Configuration after the installation.

Depending on the environment, the users - and thus the required ixi-UMS data - can be managed:

- in the [ixi-UMS User Management](#) (contained in the ixi-Framework)
- in the [Active Directory](#)
- in [Lotus Domino](#) (names.nsf)

Depending on the selection made, a note about ixi-UMS User Administration is displayed.

If a Microsoft Exchange Server is installed in the organization, one of the "user-defined attributes" (extensionAttribute) should be selected.

If no Microsoft Exchange Server is installed or no free "extensionAttribute" is available, a ixi-UMS Schemaextension can be performed or another attribute can be used.

The attribute of the ixi-UMS scheme extension is called "ixiumsUserData" and can be selected. If another attribute is to be used, this must be entered.

ixi-UMS Mail Server Connector Wizard

Schema Installation

The ixi-UMS users can be managed directly in IBM Domino.

Install schema

In order to manage the ixi-UMS users in IBM Domino you have to extend the "names.nsf". For the extension of the schema, an installed and configured IBM Notes Designer is required on the computer.

You can execute the extension of the "names.nsf" any time later on. For further information please refer to the ixi-UMS Mail Server Connector Manual at "How To - Schema Installation in IBM Domino".

<Previous **Next>** Cancel

If Lotus Domino was selected as the user administration, the extension of the schema of Names.nsf can be started directly if an Lotus Domino Designer is installed on the computer.

Otherwise the installation will be indicated.

According to the selection, the required data are filled out automatically or must be entered manually.

3.7.1 User Management in Active Directory

When the server is in the domain and the DNS-server can be queried, the login-data are read out and displayed. To authenticate against the LDAP server, the user specified under "User DN" is used.

Important: This function only requires "read" access to the database and can also be performed via the "Global Catalog".

ixi-UMS Mail Server Connector Wizard

LDAP Connection

Please specify the connection data to your LDAP server

The connection data can be changed later in the configuration.

LDAP Host: Port:

Base DN:

User DN:

Password:

Attribute to store user data:

<Previous **Next>** Cancel

If the website for the ixi-UMS User Settings is to be made available to the users in ixi-UMS User Portal, the account entered here must have "write permission" in the LDAP database.

A different port for write access can be explicitly entered in the ixi-UMS Mail Server Connector configuration after installation.

Under "Attribute for saving user data" the attribute in which the ixi-UMS Mail Server Connector searches for the ixi-UMS properties of the user must be specified.

In this case, note the instructions and instructions under "Additional Informations": "Storing user data in arbitrary field" and "Extending the Schema - Active Directory".

3.7.2 User Management in Lotus Domino

To save the ixi-UMS user properties in user management in Lotus Domino, an extension of the names.nsf is required.

Important: The LDAP user must have at least read access to the domino user database!

ixi-UMS Mail Server Connector Wizard

LDAP Connection

Please specify the connection data to your LDAP server

The connection data can be changed later in the configuration.

LDAP Host: Port:

Base DN:

User DN:

Password:

Attribute to store user data:

<Previous **Next**> Cancel

If the website for the ixi-UMS user settings is to be made available to the users in ixi-UMS User Portal, the account entered here must have "write permission" in the LDAP database.

The LDAP connection data must be entered manually.

At "Attribute to store user data", the wizard of the ixi-UMS Mail Server Connector automatically suggests the ixi-UMS Enterprise default:

servoniccom2003IXIUMSUsrData
You should adopt this setting.

3.7.3 User Management in ixi-UMS User Management

The OPEN LDAP server for ixi-UMS user management is included in the ixi-Framework and can be installed at any time by calling the setup again.

ixi-UMS Mail Server Connector Wizard

LDAP Connection

Please specify the connection data to your LDAP server

The connection data can be changed later in the configuration.

LDAP Host: Port:

Base DN:

User DN:

Password:

Attribute to store user data:

<Previous **Next**> Cancel

When the OPEN LDAP-server for the ixi-UMS-User Management is installed on the same server, the connection data are read out and displayed.

3.8 Connector Bindings

Each instance of ixi-UMS Mail Server Connector uses one of the local IP addresses/port combinations to receive SMTP messages.


The mail server must send outgoing UMS-messages to this IP-address and port.

Select a free IP address from the list or change the port.

The screenshot shows a wizard window titled "ixi-UMS Mail Server Connector Wizard" with a sub-header "Connector Bindings". The main text reads: "Please specify the local IP address on which the first instance of ixi-UMS Mail Server Connector should be bound". Below this, it states: "Each instance needs a free port in order to receive e-mails from mail server. The mail server has to be configured accordingly to send e-mails to the IP address and port that is specified here." It then lists two options: "You may - assign each instance their own IP address with the same port (default 25) or - bind all instances to the same IP address with a different port each." The "Bound IP:" field contains "10.10.10.188" with a green checkmark and a "Refresh" button. Below it, it says "By default, this instance of ixi-UMS Mail Server Connector is bound to port 25." and has a "Change port" checkbox and a text box containing "25". At the bottom are buttons for "<Previous", "Next>", and "Cancel".

Click on the "Update" button to check the entered combination again.

If [several instances](#) are to be used simultaneously, each instance must be assigned its own IP address (which can then also use the same port (standard 25) or all instances can be linked to the same IP address and a different port can be entered for each. |

If several instances are created but not used at the same time, the combination of IP address and port can be assigned several times. If a combination has already been created, the selection is displayed with an .

If you choose a port that differs from the standard SMTP port 25, make sure that the mail server supports sending to a different port.

See Additional Informations for notes on the required setup in Microsoft Exchange Server and Lotus Domino. How the Microsoft Exchange Server can be switched to another port for sending is explained in the first paragraph of the Additional Information: Exchange Server - Ports and IP-Addresses.

3.9 Connection to the mail system

In this section, you configure the delivery of the incoming ixi-UMS Messages in your Lotus Domino Server system.

As **Mail Server Address**, please enter the IP address, FQDN or the host name of the Mailserver.

You can use the information in "**Your Email Domain**" and "**Edit Address Template**" to define the sender address of incoming ixi-UMS Messages. Generally, you will want to set up an address of the following kind: Sender_Fax_Number@fax.Your_Company.com. You can change this setting via the address template. The following variants are important here:

- \$(number) Sender call number
absolutely imperative, as otherwise e.g. answering is not possible.
- \$(addrtype) Address type (Fax, Voice, SMS)
absolutely imperative; must be contained in the template for the detection of the nature of a message.
- \$(maildomain) E-mail domain
to set on the domains that are used for the ixi-UMS Messages, as otherwise e.g. answering is not possible.

If you want to make use of the reply-feature with incoming UMS mails, please take also care that the entries here suit to the routing of **outgoing** UMS messages.

Under Additional Informations you will find information on the required settings in the Microsoft Exchange Server and Lotus Domino..

The screenshot shows a wizard window titled "ixi-UMS Mail Server Connector Wizard" with the sub-header "Mail System Connection". Below the sub-header is the instruction "Please configure delivery of ixi-UMS messages to your mail system". The form contains the following fields and options:

- Mail Server Address: [Mail server]
- Mail Domain: [domain.net] 0814247990@fax.domain.net
- Edit Address Template: [\$(number)@\$(addrtype).\$(maildomain)]
- Default Recipient e-mail Address: [admin@domain.net]
- Use SMTP Authentication
 - Username: []
 - Password: []
- Enable Connector Log

At the bottom right, there are three buttons: "<Previous", "Next>" (highlighted with a blue border), and "Cancel".

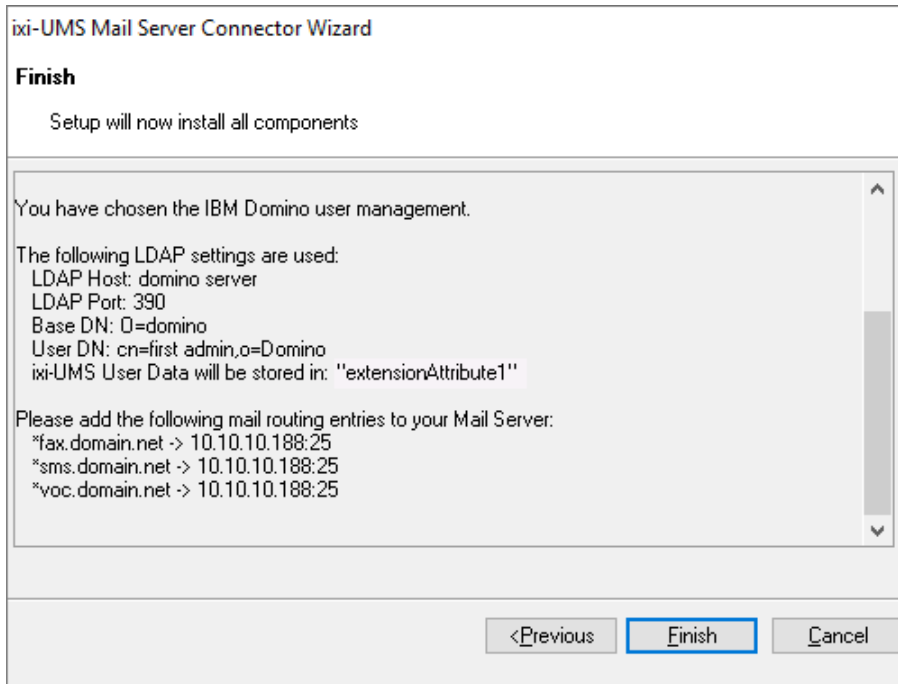
The **Default Recipient Email** address for incoming, undelivered ixi-UMS Messages (messages for that no user/recipient can be detected by LDAP) is used. The automatically entered e-mail address is derived from the user you use for the LDAP-access. The **Default Recipient Email** can be changed at any time after the installation via the MMC Snap In of the ixi-UMS Mail Server Connector.

When you click on "**Use SMTP Authentication**", the Connector first authenticates with user name and password at the Mailserver before it sends the message.

Use "**Enable Connector Log**" to activate the log file for the LDAP connection and search operations.

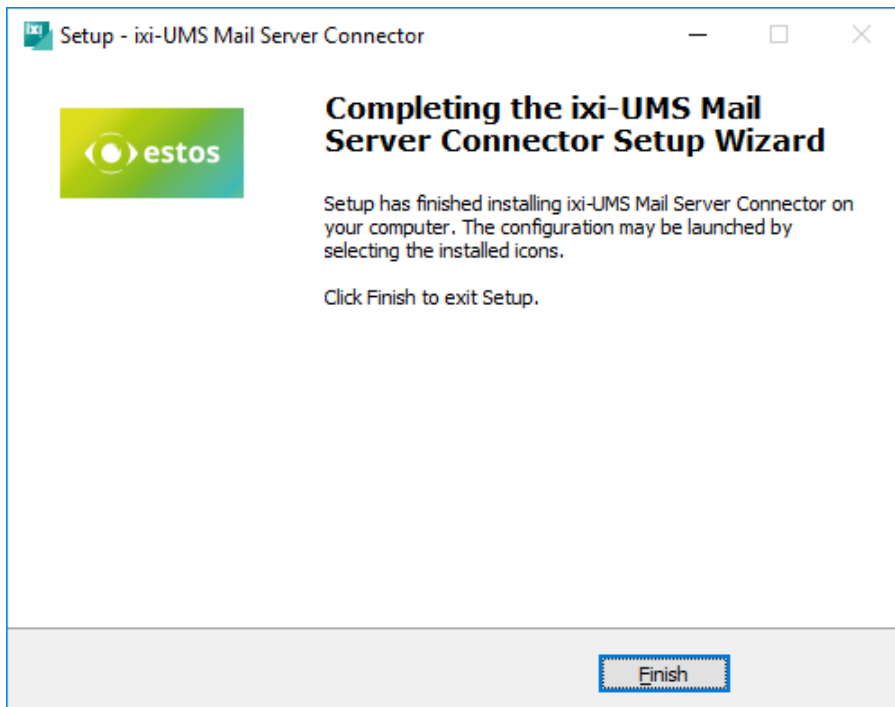
3.10 Finish

A summary is displayed at the end of the installation. You can take the information for the ixi-UMS Enterprise message routing in particular.



The summary shows you the domains you have to set up at the IBM Domino Server as "Other SMTP Domains" as well as the respective IP address to the ixi-UMS Mail Server Connector.

See "Additional Informations" for sample setup examples for the Microsoft Exchange Server and Lotus Domino mail servers.



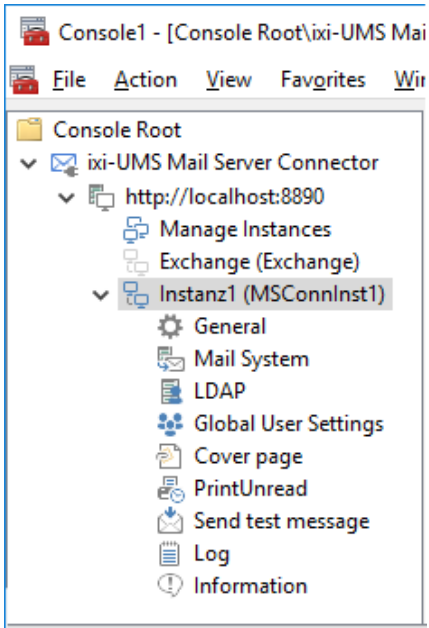
After you have pressed the "Finish" button, the ixi-UMS Kernel Routing Table has to be refreshed. In order to do so, the ixi-UMS Kernel Service is rebooted !

In addition, the setup tries to register the ixi-UMS card for the user administration in the Active Directory. Please note the information under Additional Informations: Register ixi-UMS Card for user administration

When all the components are installed and configured, the setup can be exited by clicking on "Finish".

4 ixi-UMS Connector Management

The ixi-UMS Mail Server Connector is configured via a snap-in in the Microsoft Management Console (MMC).



During the installation, the required snap-ins are automatically registered on the computer.

The snap-in can be added to a 32bit or 64bit MMC.

All settings can be opened and edited per instance.

Additional information about using the ixi-UMS MMC can be found in the Additional Informations:

Changing MMC Language

Register SnapIn

Add SnapIn in MMC and administer other ixi-UMS components of the same version installed in the network.

4.1 Manage instances

Several instances can be created in ixi-UMS Mail Server Connector. This makes it possible to connect several mail servers and / or LDAP user administrations.

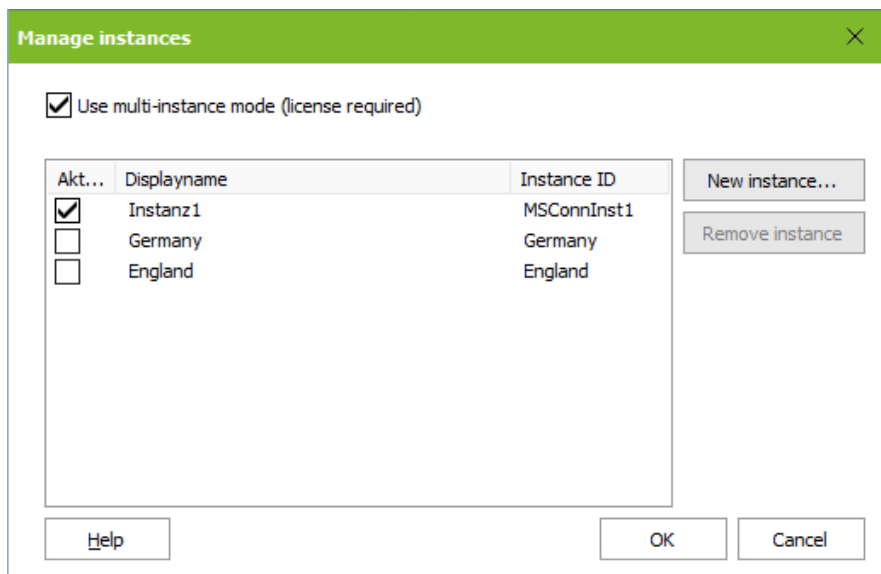
You can always set up multiple instances. Whether these can be used at the same time depends on the ixi-UMS license.



The use of multiple instances at the same time is subject to license and fee.

If several instances are to be used simultaneously, each instance must be assigned its own IP address (which can then also use the same port (standard 25)) or all instances must be bound to the same IP address and a different port must be entered for each instance.

In the menu "Manage instances" all instances that have been set up are displayed. Regardless of the license, [new instances can be created](#) and [deleted](#).

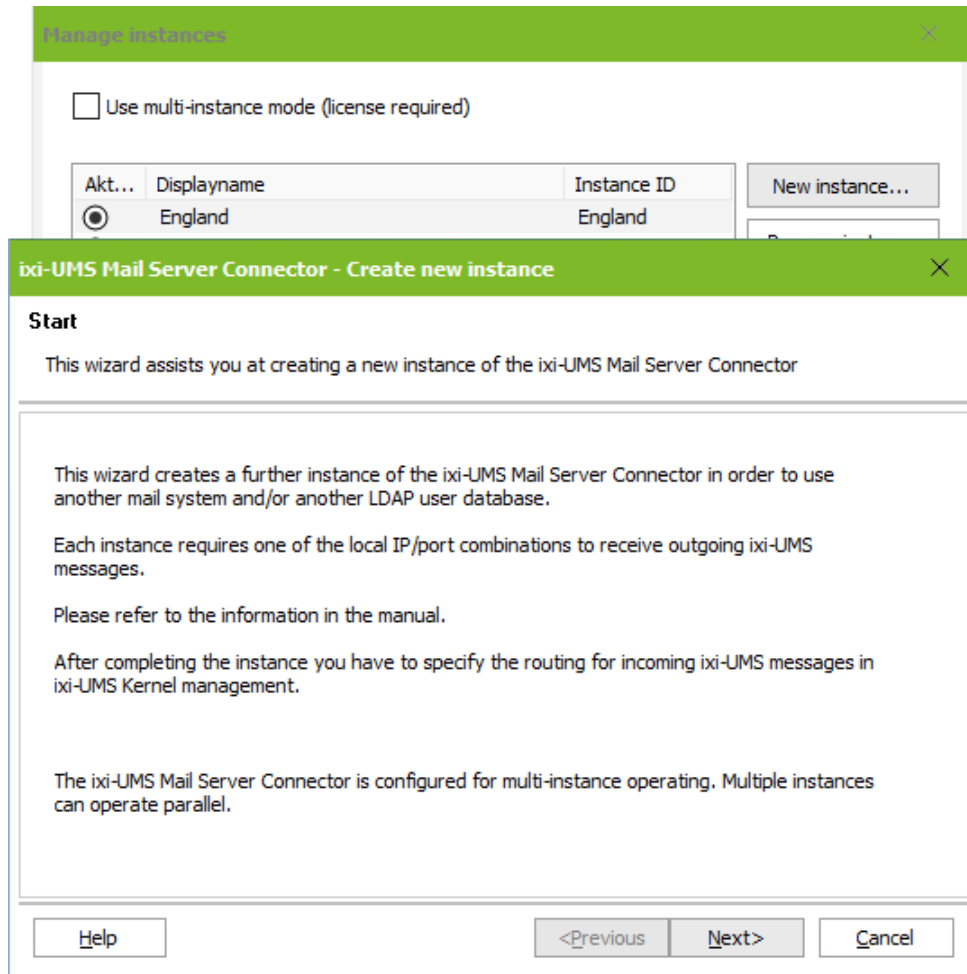


Depending on the license, multiple instances can be activated or only one instance can be selected.

4.1.1 New Instance

A new instance is created by means of a wizard in which all required data are queried. If several instances of ixi-UMS Mail Server Connectors are to be used at the same time, note [the settings required for the connector](#).

Click the "New Instance" button to start the wizard.



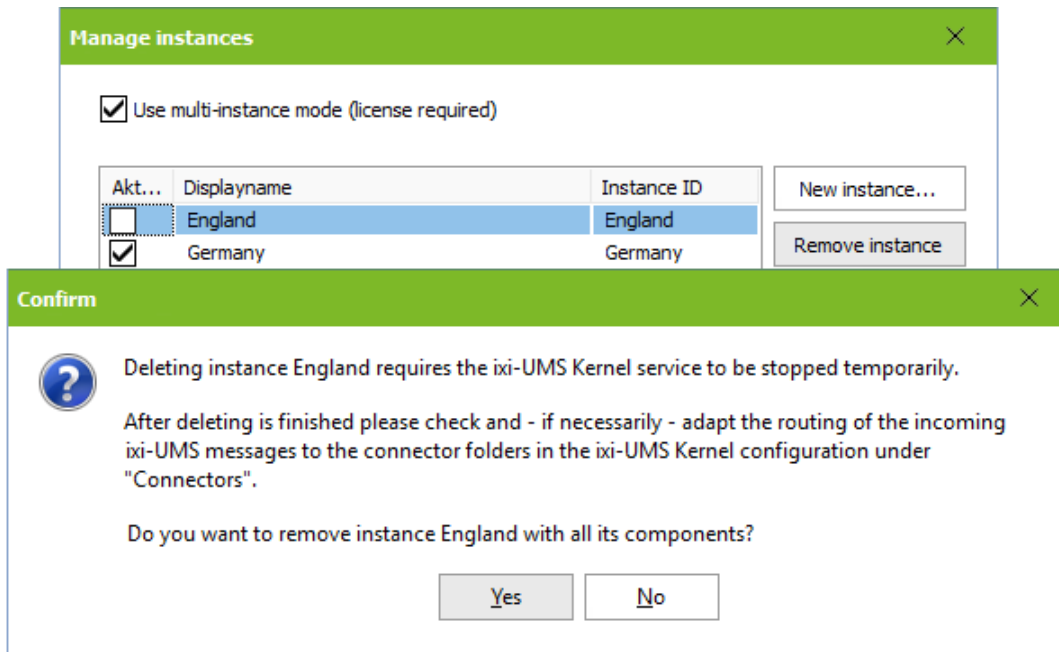
The procedure and all requested data correspond to the procedure of the [installation](#).

4.1.2 Delete Instanz

Each instance can be deleted using the "Remove instance" button.

In this case the data will be deleted:

- the corresponding ixi-UMS Mail Server Connector (instance) service
- optionally the associated ixi-UMS PrintUnread service
- all associated directories
- all corresponding configuration data

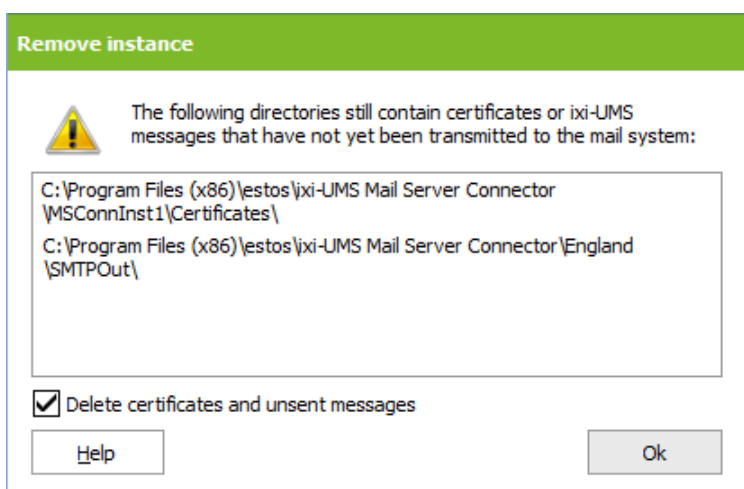


The ixi-UMS user data in the respective LDAP database is not deleted.

Also a schema extension of the Active Directories or the extension of names.nsf at Lotus Domino will not be removed.

The extension of names.nsf on Lotus Domino can be removed manually at any time by calling the ixi-UMS installation database again.

The ixi-UMS card in the [user management of the Activ Directory](#) must be unregistered manually on all computers on which the ixi-UMS card is visible. See under Additional Informations the instruction Registering the ixi-UMS User Management Card



If ixi-UMS messages that have not yet been sent are found in the SMTP part of the instance, corresponding information is output.

If the messages are not to be deleted, the directory containing the messages is not deleted.



If ixi-UMS Enterprise continues to be used after deleting an instance, please check the settings under "Connectors" in the ixi-UMS Kernel Configuration.

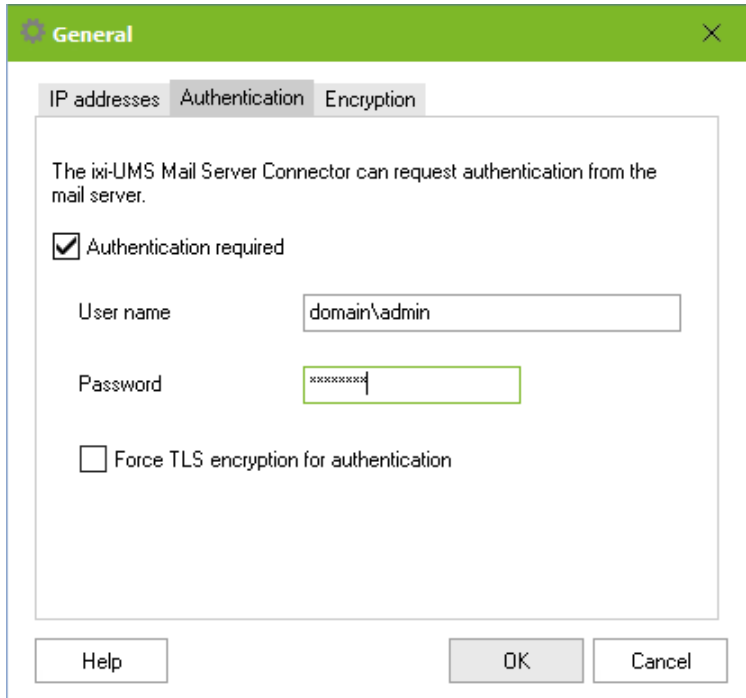
4.2 Instance

The following configurations are available for each instance created.

4.2.1 General

At "General", the communication from the mail server to the ixi-UMS Mail Server Connector (for outgoing ixi-UMS Messages) per Instance is determined.

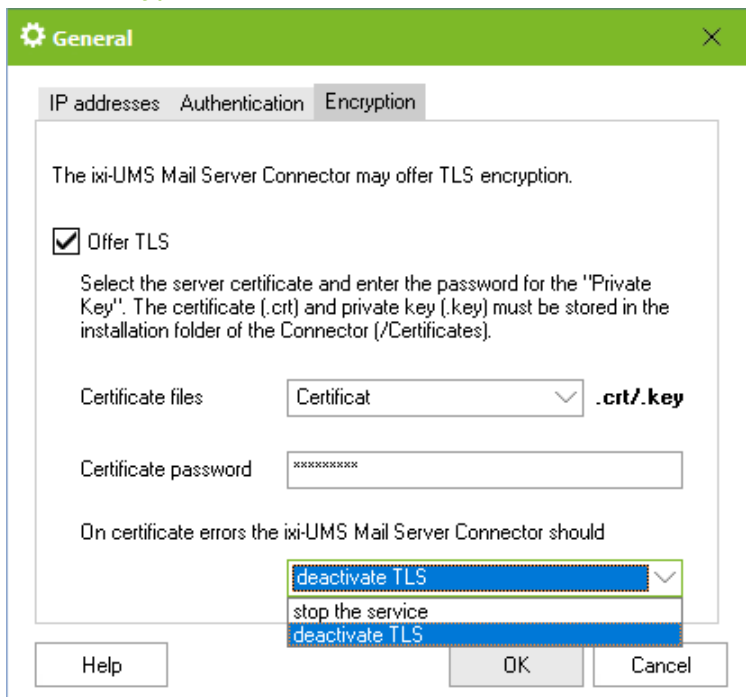
4.2.1.1 Authentication



In the tab "Authentication", you can enter a user, with that the mail server must login at the ixi-UMS Mail Server Connector in order to transmit messages.

Optionally, the authentication via TLS-encryption can be forced in addition. This has to be [configured then](#).

4.2.1.2 Encryption



The communication between mail server and ixi-UMS Mail Server Connector can be encrypted. In order to do so, it is **mandatory** to state a valid certificate, which is transmitted by the connector for the authentication.

The Base64-coded X.509 certificate together with the corresponding private key in the form of a "crt" and a "key" file must be stored in the installation directory of the ixi-UMS Mail Server Connector under `..\<instance name>\Certificates`.

At "Additional Information - Certificates", there are explanations on how to create these files from a pfx-certificate.

Please determine how the Connector shall behave if the transmitted certificate does not correspond with the deposited certificate.

4.2.1.3 IP-Addresses

Each instance of ixi-UMS Mail Server Connector uses one of the local IP addresses/port combinations to receive SMTP messages.

General

IP addresses Authentication Encryption

Enter the IP address and port on which the ixi-UMS Mail Server Connector should be bound.

Server 10.10.10.101

Port 25 Refresh

Only accept messages from the following IP addresses:

Server

Server

Server

Help OK Cancel

The mail server must send outgoing UMS-messages to this IP-address and port.

Configure the IP address and port on which the ixi-UMS Mail Server Connector should receive the emails from the mail server.

If several instances are to be used simultaneously, each instance must be assigned its own IP address (which can then also use the same port (standard 25) or all instances can be linked to the same IP address and a different port can be entered for each. If you choose a port that differs from the standard SMTP port 25, make sure that the mail server supports sending to a different port.

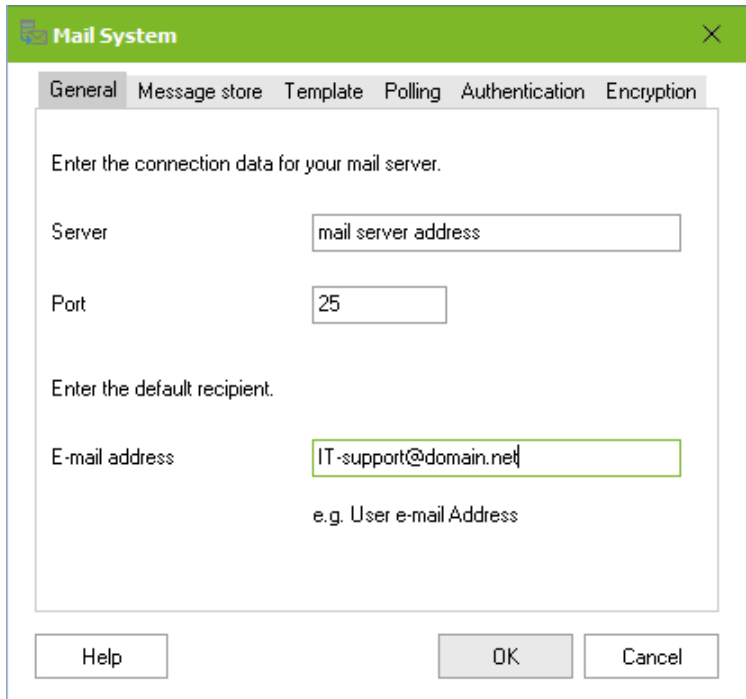
In addition, it can be determined from which IP addresses the ixi-UMS Mail Server Connector should accept UMS messages (e-mails).

See in the Additional Informations for notes on the required setup in Microsoft Exchange Server and Lotus Domino. How the Microsoft Exchange Server can be switched to another port for sending is explained in the first paragraph of the Additional Information: Exchange Server - Ports and IP-Addresses.

4.2.2 Mail System

Here you can determine settings for the communication of the ixi-UMS Mail Server Connector to the mail server (for incoming UMS-messages).

4.2.2.1 General



The screenshot shows the 'Mail System' dialog box with the 'General' tab selected. The dialog has a title bar with a close button. Below the title bar are tabs for 'General', 'Message store', 'Template', 'Polling', 'Authentication', and 'Encryption'. The main area contains the following fields and text:

- Text: "Enter the connection data for your mail server."
- Field: "Server" with the value "mail server address".
- Field: "Port" with the value "25".
- Text: "Enter the default recipient."
- Field: "E-mail address" with the value "IT-support@domain.net".
- Text: "e.g. User e-mail Address" below the field.
- Buttons: "Help", "OK", and "Cancel" at the bottom.

Mail host is the computer to which incoming UMS messages will be sent using the TCP port specified in Mail Port.

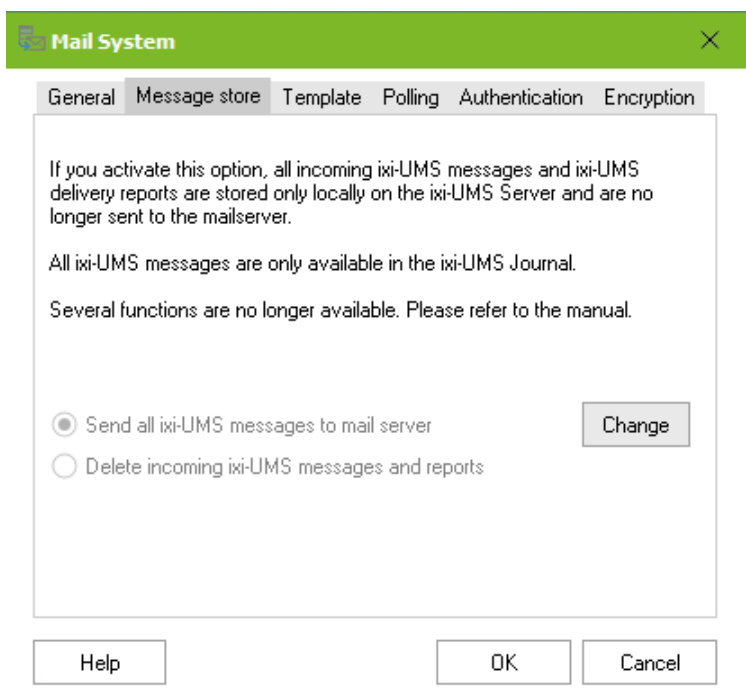
The *Default Recipient* receives all the ixi-UMS Messages, which cannot be assigned to a certain user. Please use only existing e-mail addresses from your mail system.

Under Additional Information "Delivery to Default User with LDAP-Error" you can find out, how this can be influenced.

4.2.2.2 Message store

If no mail server is available for the incoming message, all incoming ixi-UMS messages and responses can be stored in the local database. **Prerequisite: In ixi-UMS Kernel, archiving must be activated.**

In that case, users can access all ixi-UMS Messages and reports **only through the ixi-UMS Web Journal**. This setting is valid for all users and all ixi-UMS Message types.



The screenshot shows the 'Mail System' dialog box with the 'Message store' tab selected. The dialog has a title bar with a close button. Below the title bar are tabs for 'General', 'Message store', 'Template', 'Polling', 'Authentication', and 'Encryption'. The main area contains the following text and controls:

- Text: "If you activate this option, all incoming ixi-UMS messages and ixi-UMS delivery reports are stored only locally on the ixi-UMS Server and are no longer sent to the mailservers."
- Text: "All ixi-UMS messages are only available in the ixi-UMS Journal."
- Text: "Several functions are no longer available. Please refer to the manual."
- Radio button: "Send all ixi-UMS messages to mail server" (selected).
- Radio button: "Delete incoming ixi-UMS messages and reports".
- Button: "Change" next to the selected radio button.
- Buttons: "Help", "OK", and "Cancel" at the bottom.

If the incoming ixi-UMS Messages and reports are not to be sent to the mail server, they must be deleted by the ixi-UMS Mail Server Connector.

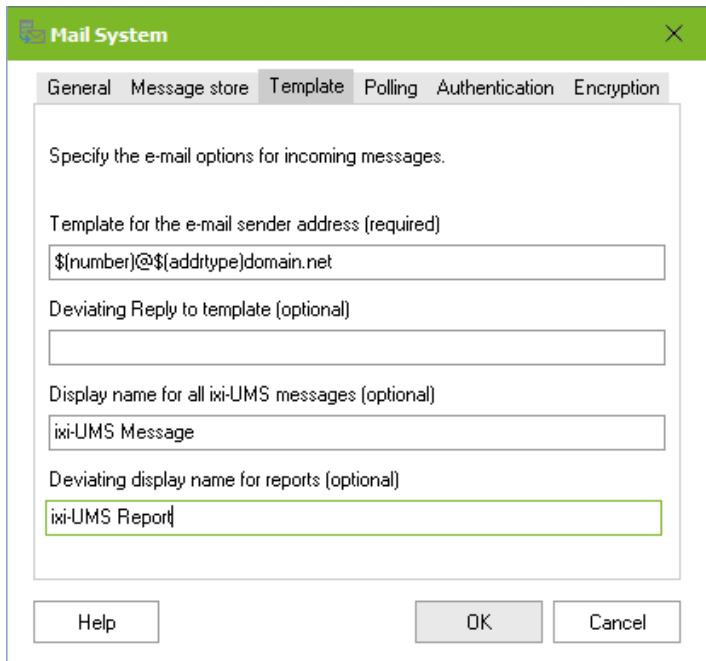
Error messages and notifications created by the ixi-UMS system will continue to be delivered.

The function "print Incoming" in the ixi-UMS Render Connector is still available.

The functions "SenderIdentification", OCR and "Date / Time per Page" in the ixi-UMS Render Connector, as well as the remote inquiry of ixi-UMS Messages by phone with the ixi-UMS Voice-Mail Server **are no longer available**.

4.2.2.3 Template

In *Template for email sender address* you can determine, how the e-mail sender address for incoming ixi-UMS Messages shall be composed. It should be consistent with the address for outgoing UMS-messages.



The screenshot shows the 'Mail System' configuration window with the 'Template' tab selected. The window contains the following fields and options:

- General Message store Template Polling Authentication Encryption
- Specify the e-mail options for incoming messages.
- Template for the e-mail sender address (required):
- Deviating Reply to template (optional):
- Display name for all ixi-UMS messages (optional):
- Deviating display name for reports (optional):
- Buttons: Help, OK, Cancel

The following variables are available:

\$(number) = Sender number

imperative, as otherwise e.g. replies are not possible

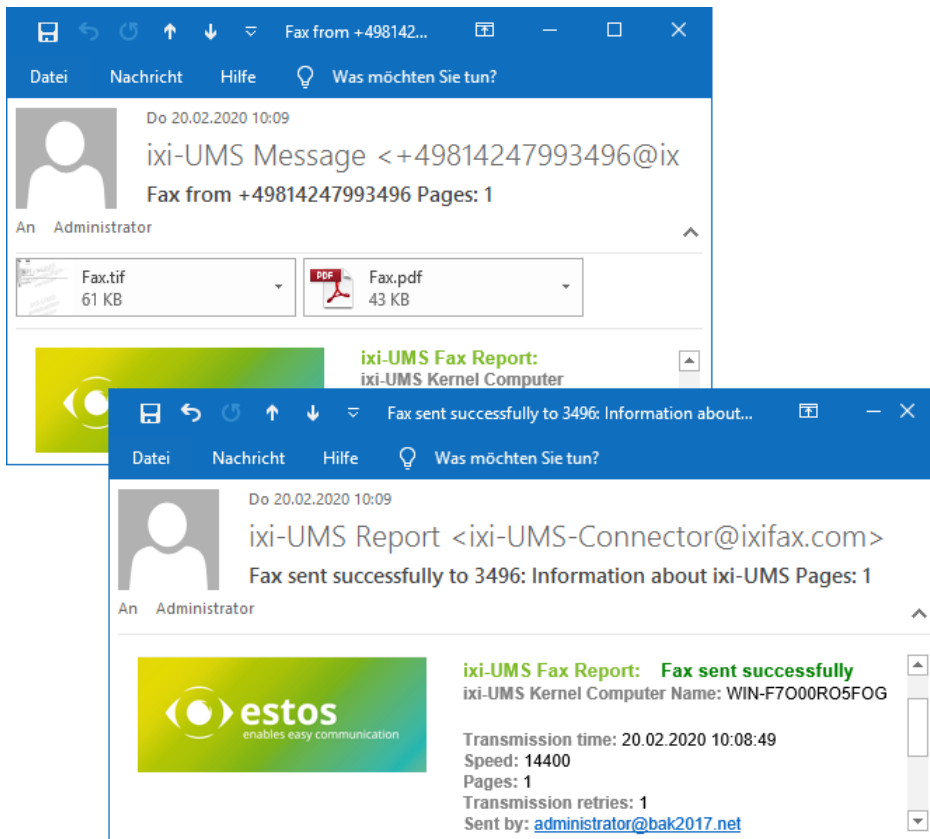
\$(addrtype) = Address type (Fax, Voice, SMS)

imperative; must be contained in the template in order to detect the message type.

In special cases, the sender address for incoming messages differs from the addressing that users must use for outgoing messages. A reply-to an incoming message would not be possible in this case.

For these environments, a **deviating ReplyTo template** can be specified, which is entered as a "Reply address" in the e-mail of the incoming message.

The format must be as described above..e.g.:**\$(number)@\$(addrtype).domain.net**



If a **display name** is determined, this name is displayed with **all the inbound messages**. This is also valid for reports if no other display name is entered.

There is no differentiation here regarding the message type (Fax,Voice,SMS).

You can also specify a **Deviating display name for reports** of the ixi-UMS system that is different from the name for incoming UMS-messages..

4.2.2.4 Polling

The screenshot shows the 'Mail System' dialog box with the 'Polling' tab selected. The dialog has a title bar with a close button. Below the title bar are tabs for 'General', 'Message store', 'Template', 'Polling', 'Authentication', and 'Encryption'. The 'Polling' tab contains the following text: 'Specify how often and at what interval the transmission of incoming messages should be repeated to the mail server.' Below this text are two main settings: 'Number of retries' with a dropdown menu set to '5', and 'Interval length in seconds' with ten input fields labeled 'Interval 1' through 'Interval 10'. The values in these fields are: Interval 1: 60, Interval 2: 600, Interval 3: 3600, Interval 4: 86400, Interval 5: 172800, Interval 6: (empty), Interval 7: (empty), Interval 8: (empty), Interval 9: (empty), Interval 10: (empty). At the bottom of the dialog are three buttons: 'Help', 'OK', and 'Cancel'.

Here you can adjust, how often and in which intervals the ixi-UMS Mail Server Connector tries to send incoming messages to the mail server.

If the transfer has not been successful even with the last try, the "e-mail" is deposited in the directory "Badmail" at ...\\ixi-UMS Mail Server Connector\\<Instanz>\\SMTPOut.

When the connection to the mail server is possible again (WITHOUT changing the connection data), the files can be copied back from there to the directory ...\\ixi-UMS Mail Server Connector\\<Instanz>\\SMTPOut. They are then transferred to the mail server.

If the destination address of the mail server has been changed, the "e-mails" that have not yet been sent must be adapted. See [HowTo: Change target mail server of incoming UMS messages](#).

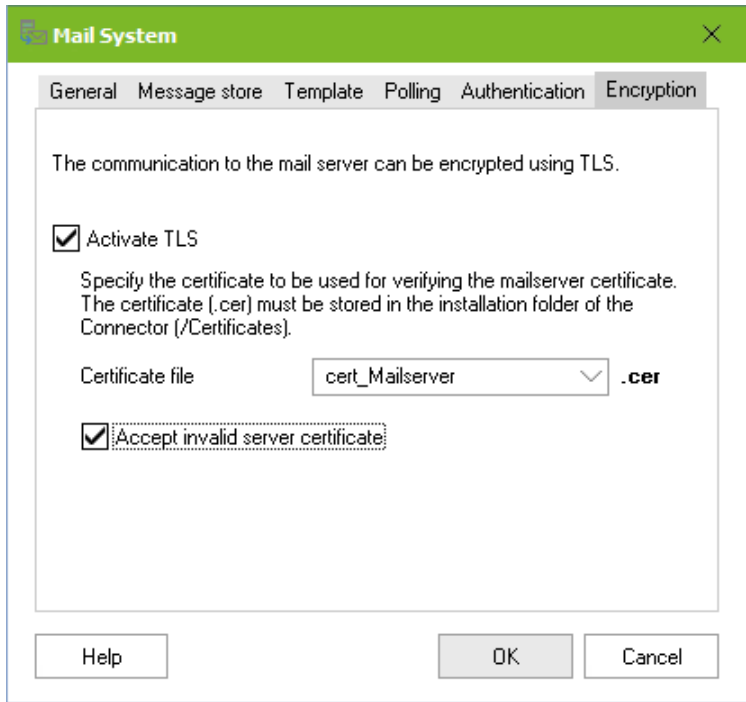
4.2.2.5 Authentication

The screenshot shows the 'Mail System' dialog box with the 'Authentication' tab selected. The dialog has a title bar with a close button. Below the title bar are tabs for 'General', 'Message store', 'Template', 'Polling', 'Authentication', and 'Encryption'. The 'Authentication' tab contains the following text: 'If the mail server requires SMTP authentication for the transfer, specify the credentials.' Below this text are two input fields: 'User Name' with the value 'domain\\admin' and 'Password' with a masked password represented by 'xxxxxxxxxx'. At the bottom of the dialog are three buttons: 'Help', 'OK', and 'Cancel'.

In the tab Authentication, you can state a user, with that the ixi-UMS Mail Server Connector logs in at the mail server.

This entry is only necessary if the mail server requests this explicitly.

4.2.2.6 Encryption



The communication between mail server and ixi-UMS Mail Server Connector can be encrypted. In order to do so, it is **mandatory** to state a valid certificate, which is transmitted by the mail server for the authentication.

The **base64-coded** CA-certificate must be stored in the installation directory of the ixi-UMS Mail Server Connectors under `..\<instance name>\Certificates` as "cer"-file. See also "Additional Informations - Certificates",

You can determine whether the Connector shall **accept an invalid certificate**. In this case, it also accepts messages from the mail server when the certificate transmitted:

- is not valid (yet)
- does not correspond with the deposited one
- has expired
-

4.2.3 LDAP

The ixi-UMS Mail Server Connector determines the e-mail address for the incoming messages via LDAP query and checks, for example, the sending authorization for outgoing messages. The query is executed with every incoming and outgoing message. For this feature, only "read" access to the data base is required and can also be executed via the "Global Catalog".

If the users in ixi-UMS User Portal are to use the website for the ixi-UMS User Settings, the account entered here must have "write permission" in the LDAP database. If necessarily a different Port can be [entered](#) .

4.2.3.1 Connection

Enter at least one LDAP-server and the corresponding port. The first connection data are entered with the installation of the ixi-UMS Mail Server Connector

Server	Port
LDAP-Server1	389
Optional: Connections to alternative LDAP servers.	
LDAP-Server2	389
LDAP-Server3	389

If the first LDAP-server is not available, the query on the next one is started. The query on the next server is executed until either this server is no longer available or the "ixi-UMS Mail Server Connector Service" is restarted.

All the server must be domain controllers / LDAP-data base servers of the same domain on the same level.

For this feature, only "read" access to the data base is required. If a domain structure including sub-domains shall be searched in the Active Directory environment, the search must be via the "Global Catalog" (Port 3268).

SSL/LDAPS

If the communication with the LDAP-server shall be encrypted, please take care when entering the servers, that they correspond with the certificate. See also "Certificates" in the Additional Informations,

Individuell LDAP port

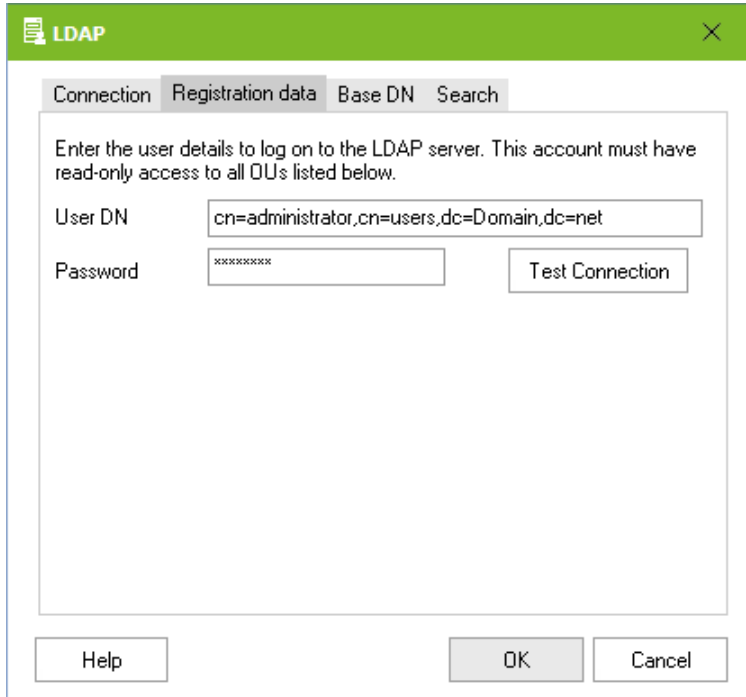
If the users are to use the ixi-UMS User Portal provided web page of the ixi-UMS user settings, it must be possible to write to the LDAP database via the specified port.

If the [query](#) is carried out for incoming or outgoing UMS messages e.g. in the Active Directory environment via the "Global Catalog" or another port without write access, another LDAP port e.g. 389 can be specified here.

4.2.3.2 Registration Data

With the account entered here, the query to the LDAP-data base is executed. The query is executed with every incoming and outgoing message. Only "read" access is required. See also under Additional Informations: "LDAP Authentication and used Attributes".

With the account stated here, the query to the LDAP-data base is executed. For this funktion only "read" access is required. If the users in ixi-UMS User Portal are to use the website for the ixi-UMS User Settings, the account entered for the LDAP-access must have "**write access**" to the specified [ixi-UMS attribute](#).



Please take Base DN, User DN and User Password from your LDAP-server configuration.

The LDAP-query can be executed on all the OUs within the entire **domain**.

If the LDAP query is executed on an Active Directory, then the search via the ["Global Catalog"](#) can also be performed organization-wide.

If the search shall be limited to single OUs, they can be entered by clicking on the "Add"-button.

The paths must be entered as full BaseDN.

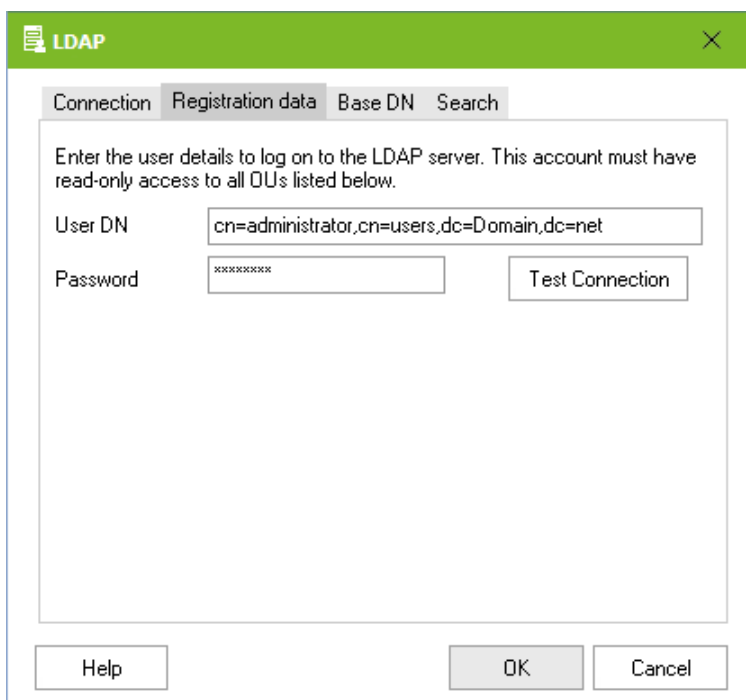
Examples of credentials:

Active Directory: cn=ldap User, OU=ServerAccounts,OU=Muenchen,DC=Deutschland,DC=Organisation,DC=loc

Lotus Domino: cn=admin,o=domino

ixi-UMS User Management (default installation): cn=ixi,DC=net

4.2.3.3 Base DN



The LDAP-query can be executed on all the OUs within the entire **domain**.

If the LDAP query is executed on an Active Directory, then the search via the ["Global Catalog"](#) can also be performed organization-wide.

If the search shall be limited to single OUs, they can be entered by clicking on the "Add"-button.

The paths must be entered as full BaseDN.

4.2.3.4 Search

UMS Attribute specifies the LDAP attribute name which contains ixi-UMS user data. The attribute names depend on the LDAP Server being used. However, you can specify any attribute.

LDAP

Connection Registration data Search ixi-UMS User Preference

Enter the name of the LDAP attribute to where the data should be stored.

UMS Attribute extensionAttribute1

Search Template

```
(((proxyAddresses=|X|:${UMS}_wHTSPC))((proxyAddresses=|X|:${UMS}))((otherFacsimileTelephoneNumber=${UMS}))((otherFacsimileTelephoneNumber=${UMS}_wHTSPC))((facsimileTelephoneNumber=${UMS}))((facsimileTelephoneNumber=${UMS}_wHTSPC))))
```

Help OK Cancel

Lotus Domino.

Here the extension of the "names.nsf" is mandatory!

Attribute name:

servoniccom2003IXIUMSUsrData

ixi-UMS-User Management:

Here the attribute:

ixi-umsMobileUserConfiguration

is used.

Activ Directory with Microsoft Exchange Server

One of the "extensionAttribute" should be used (recommended)

Activ Directory without Microsoft Exchange Server

Any attribute (e.g: description) or using ixi-UMS Schemaerweiterung

from Version 6.50: ixiumsUserData

older: servonic-com-2003-IXIUMSUsrData

If another attribute is to be used than before, the user data can be migrated. See Additional Informations: ixi-UMS Schema Migration

For using Active Directory see also at How To:

"Registration of the <ixi-UMS Tab for User Management" and "Storing User Data in Arbitrary Field".

In the search string template, the attributes in that the UMS-number is searched with inbound messages are displayed. The search string can be adjusted in the "IXIFramework.ini".

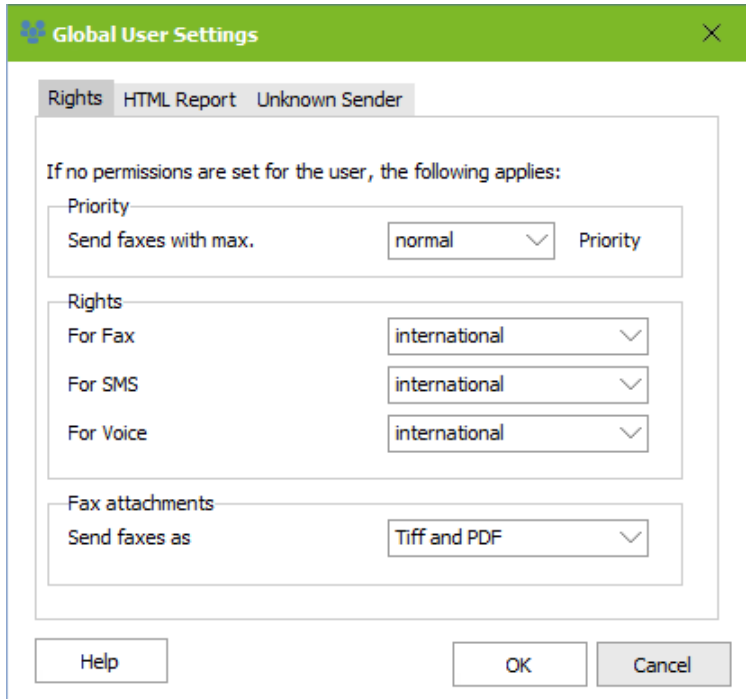
Warning: If the search string contains errors, the LDAP-search cannot be executed here and the ixi-UMS Enterprise system cannot send/receive messages to/from the mail system.

4.2.4 Global User Settings

The global settings always are effective when no individual settings were carried out with the user or the user wasn't found in the LDAP database.

4.2.4.1 Rights

In the [User Administration](#), a sender number can be entered for every user and permissions for the sending of messages can be assigned. If this option shall not be used or if not all the users have been configured yet, default rights can be determined here.



The setting is overwritten by the individual user settings.

These settings are only valid for users, whose e-mail sender addresses have been found in the LDAP-data base.

It can be set for each user if the ixi-UMS faxes delivered in TIF and / or PDF format.

Pretension is the corresponding setting in the ixi-UMS Render Connector under "Incoming Messages".

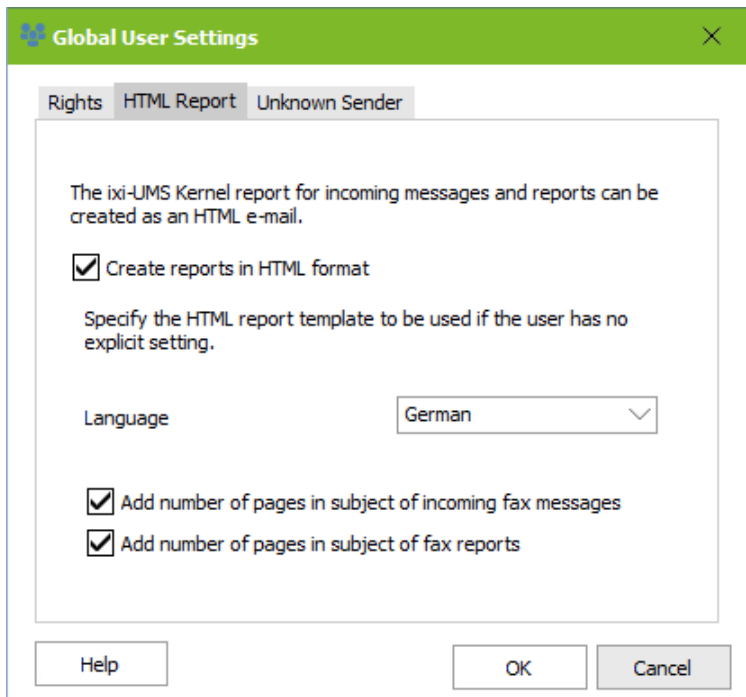
OCR files in PDF format created by the ixi-UMS Render Connector are always delivered.

If the user does not have individual settings, the ixi-UMS faxes are delivered in the format(s) set here.

If only the "[local message store](#)" is used, this setting is not relevant.

4.2.4.2 HTML Report

The ixi-UMS Kernel reports, the OCR text, the information received by the "SenderIdentification", and the fax preview with embedded image files can be sent to the user as HTML e-mail.



If the function "**Create reports in th HTML format**" activated, all ixi-UMS Kernel reports for incoming messages and reports are send in the HTML format to the mail server.

Under **language** a standard presentation must be selected. The language can be changed per user in the [user management](#).

Optionally can be also set in the [user management](#) per user that all reports are deleted.

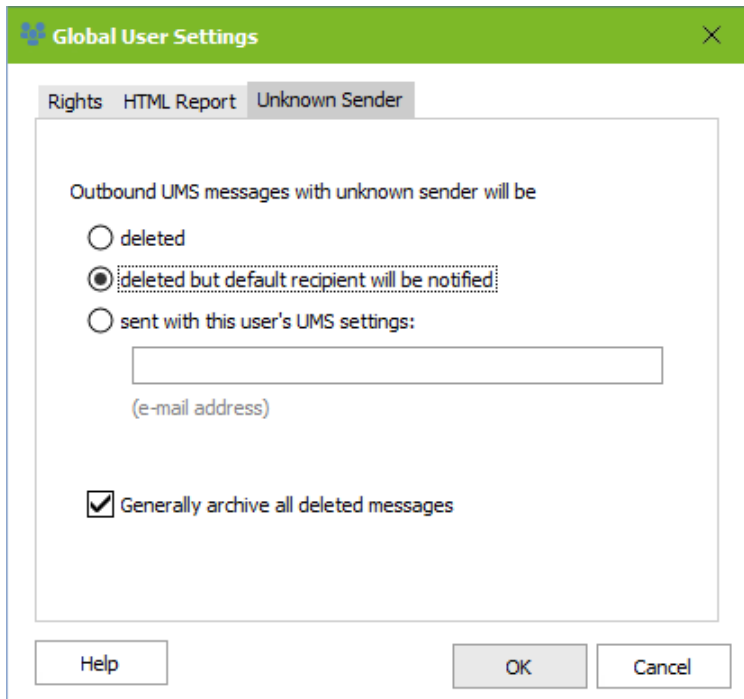
Requirements:

The generation of XML documents for the creating of the reports in the HTML format by the ixi-UMS Mail Server Connector **must be activated in the ixi-UMS Kernel**.

For more information on function and optional configurations, please refer to the Additional Information: Adjust the HTML presentations for reports.

4.2.4.3 Unknown Sender

It is determined at **Unknown Sender** how outgoing messages shall be handled, whose senders can NOT be found in the LDAP-data base.



The screenshot shows the 'Global User Settings' dialog box with the 'Unknown Sender' tab selected. The dialog has three tabs: 'Rights', 'HTML Report', and 'Unknown Sender'. The main content area contains the following options:

- Outbound UMS messages with unknown sender will be:
 - deleted
 - deleted but default recipient will be notified:
 - sent with this user's UMS settings:
 -
 - (e-mail address)
- Generally archive all deleted messages

Buttons for 'Help', 'OK', and 'Cancel' are located at the bottom of the dialog.

By default, these messages are **deleted and the default recipient is notified**.

Optionally, you can delete the message without sending a notification.

In both cases, the deleted message can be archived additionally in the installation directory ...<Instance>\SMTPIn\Error.

If messages shall also be sent if the sender was not found in the data base, "sent with this user's UMS-settings" must be chosen and a valid sender (e-mail address) must be entered.

If the sender of an outgoing message has not been found in the LDAP-data base, the permissions and sender information of the sender entered here are used.

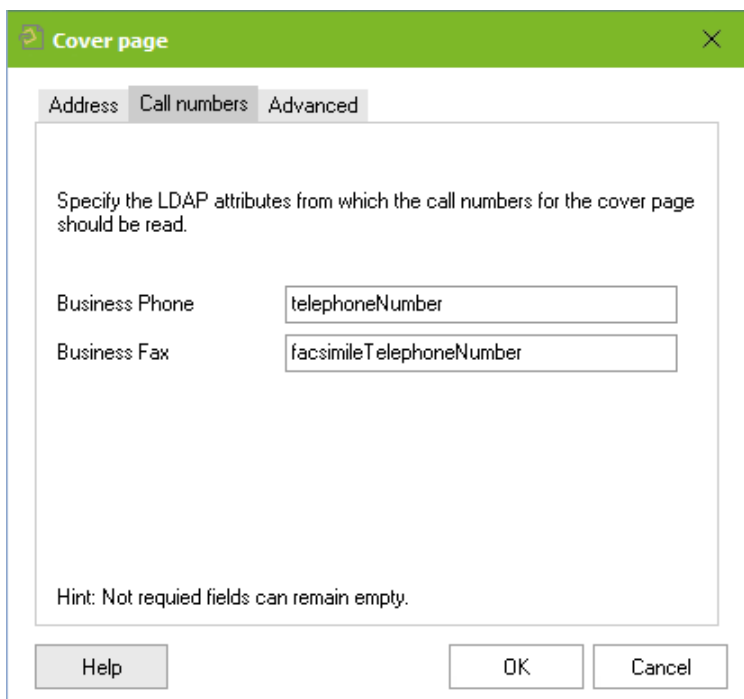
The sending report is delivered to the original sender!

4.2.5 Coveragepage

For further information about the topic "Coveragepage" as well as the assignment of the variables, please refer to the manual of the ixi-UMS Render Connector.

4.2.5.1 Call Numbers

The fax number and the phone number are read out of the standard LDAP-attributes.



The screenshot shows the 'Cover page' dialog box with the 'Call numbers' tab selected. The dialog has three tabs: 'Address', 'Call numbers', and 'Advanced'. The main content area contains the following fields:

- Specify the LDAP attributes from which the call numbers for the cover page should be read.
- Business Phone:
- Business Fax:

A hint at the bottom reads: "Hint: Not required fields can remain empty." Buttons for 'Help', 'OK', and 'Cancel' are located at the bottom of the dialog.

If the call numbers displayed on the [Coveragepage](#) shall be read out of other attributes, you have to change these attributes.

4.2.5.2 Advanced

Cover page

Address Call numbers **Advanced**

Specify the LDAP attributes from which additional individual sender information for the cover page should be read.

Department

Office

Custom1

Custom2

Custom3

Hint: Not required fields can remain empty.

Help OK Cancel

In order to display additional information on the coverpage, the fields stated here are available to you.

For the coverpage, the variables for department and office as well as 3 additional fields are available.

4.2.5.3 Address

The address information can be displayed on the [Coverpage](#) in any sequence.

Cover page

Address Call numbers Advanced

Specify the LDAP attributes from which the address data for the cover page should be read.

Company

Street

Zip / Postal Code

City

Hint: Not required fields can remain empty.

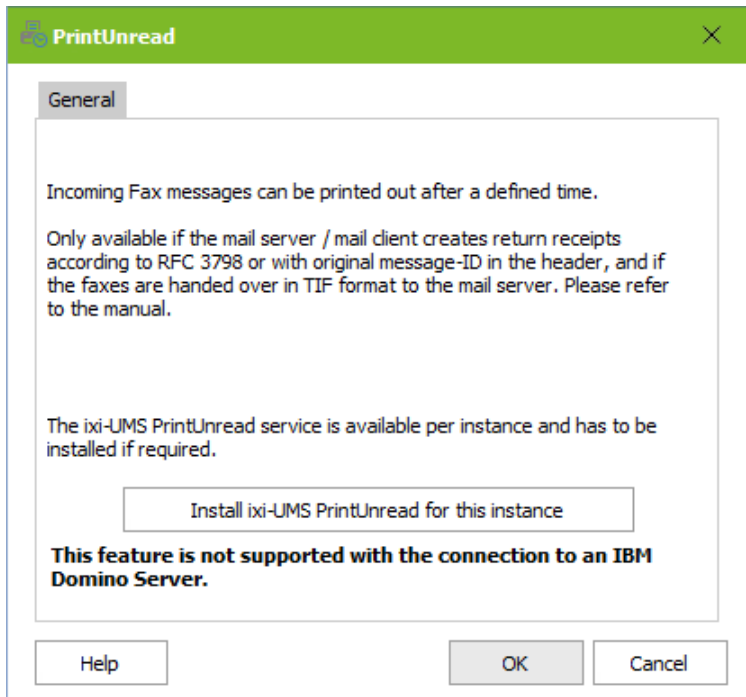
Help OK Cancel

Please enter the LDAP-attributes, from that the address information shall be read out.

For further information about the topic "Coverpage" as well as the assignment of the variables, please refer to the manual of the ixi-UMS Render Connector.

4.2.6 Print Unread

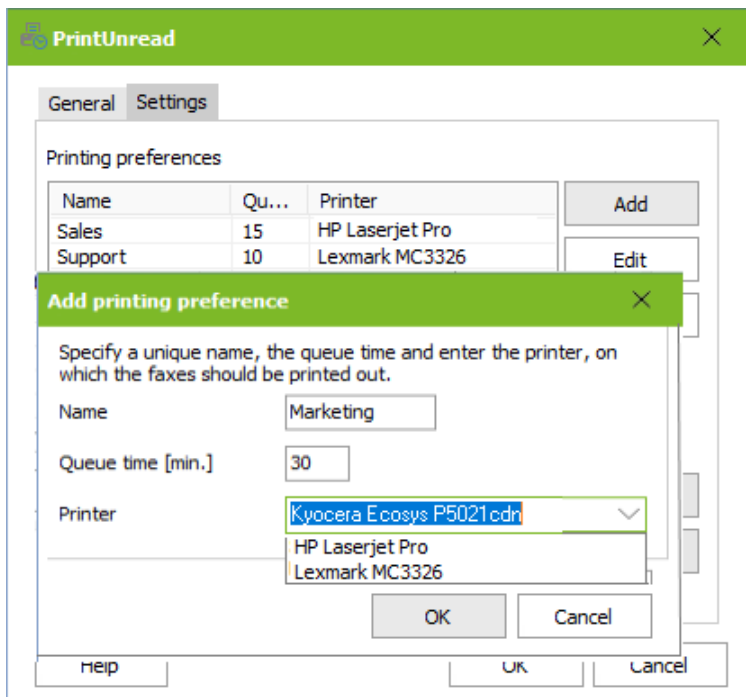
If ixi-UMS PrintUnread is installed and activated, a read confirmation is requested for the specified fax recipient numbers. If the ixi-UMS Mail Server Connector does not receive them within the set waiting time, the fax is printed out on the set printer. The printer must be installed as a network printer on the ixi-UMS server.



The prerequisite for this function is that the faxes are transferred to the mail server in TIF format and it is required that the mail client can create read confirmation according RFC 3798 or with original Message-ID and the mail server sends them on to the ixi-UMS Mail Server Connector.

Note: These features are not supported with Lotus Domino

ixi-UMS PrintUnread must be installed, activated and set up **separately for each instance**.



When the feature is installed and enabled, you can determine at "Settings" which fax recipient numbers shall be printed at which printer.

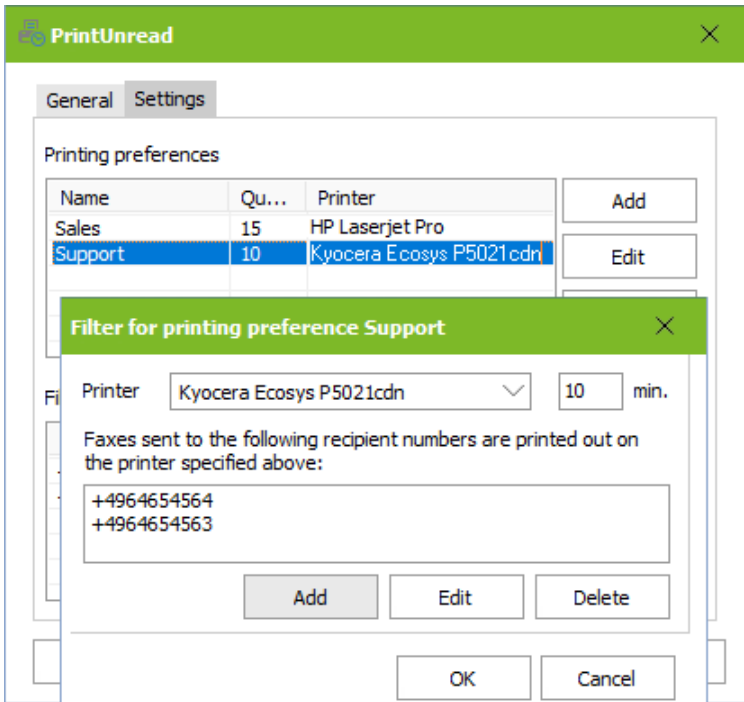
Via "Add", a new definition can be created.

A **name** for the definition must be entered.

It is determined at **Queue time**, after how many minutes the fax shall be printed out.

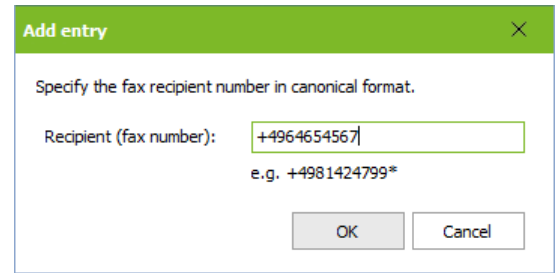
A **printer** must be selected, on which the fax shall be printed.

By clicking on "OK", this definition is saved.



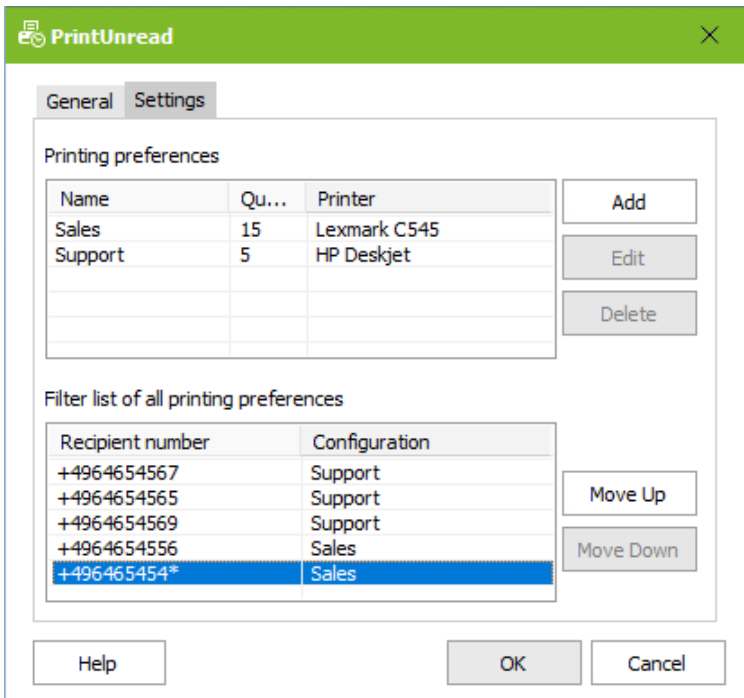
By marking the wanted definition and by clicking on "Edit", the fax recipient numbers can be entered, for which this definition shall be valid.

Any number of fax recipient number and also number ranges can be entered.



Fax recipient numbers must be entered without blanks or special characters.

If only * is entered, every incoming fax is printed out.



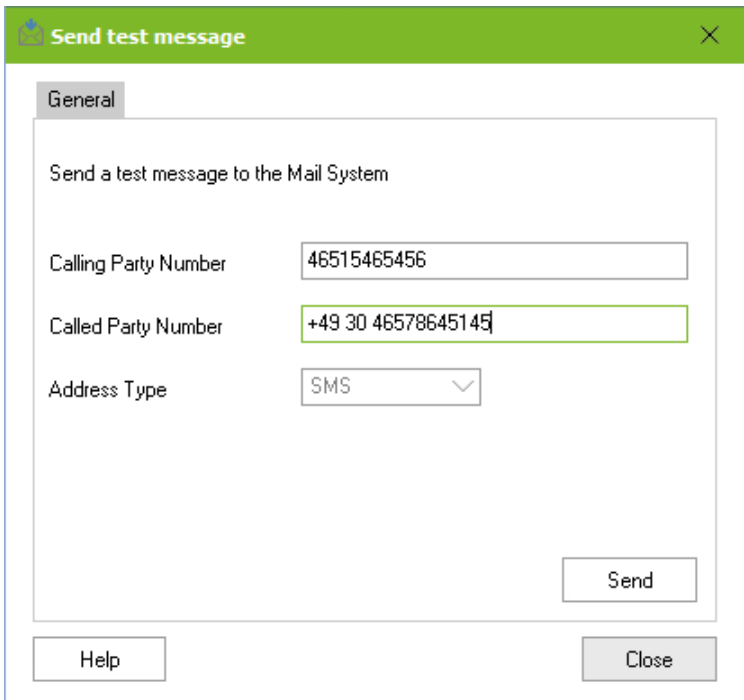
The rules are processed top down.

The list of the phone numbers is processed from above down.

This means that it is absolutely required to put the entries into the correct order. The procession of the rules is finished when the entry * is reached.

4.2.7 Send Test Message

You can use the test message to check the search in the LDAP database for the recipient number and the connection between the ixi-UMS Mail Server Connector and the mail system.



Send a test message to the Mail System

Calling Party Number: 46515465456

Called Party Number: +49 30 46578645145

Address Type: SMS

Send

Help Close

As a **calling party number** you can just specify any number. It will be used to form the mail sender address.

However, the **Called party Number** is very important. It must be entered in canonical format (country code, area code and telephone number). By default, these must be separated by spaces.

For further information on the format of the ixi-UMS-receiver number, please refer to the article "Assign ixi-UMS number" of the [user management used](#).

By clicking on the button "Send" an incoming ixi-UMS message (as SMS) is sent to the ixi-UMS Mail Server Connector.

The ixi-UMS Mail Server Connector must receive a valid e-mail address from the LDAP database for the specified destination number and then sends the message as an e-mail to the mail server.

If no user with this number is found in the LDAP directory, the mail is sent to the default recipient (see also [Mail System](#)).

The LDAP search process can be traced in the "Ldap Search" [connector log](#). Problems with delivery to the mail server are recorded in the log "SMTP connection".

4.2.8 Log

"Enabled" turns on the log file, which can be used for troubleshooting. The log files are stored in the directory\ixi-Framework\Logs.

Notice the Additional Information about the option "Monitoring Hard Disk Space".

4.2.8.1 Connector

It can be fixed, how big the log files should become and how many files should be preserved.

Count: 0 = Logfiles are not deleted
Size: 0 = Log file becomes infinitely big

Log

Connector PrintUnread

For troubleshooting purposes various log files can be activated. All log files are stored in the directory ..\ixi-Framework\Logs. The opening and deleting offered here only affects the current log file.

LDAP search
Size MB Count

SMTP connection
Size MB Count

Message ID
Size MB Count

The topical log file can be opened about the badge "opening" and be removed about the badge "extinguishing". Older log files must be opened in the file system.

LDAP-search

LDAP log for inbound and outbound messages. The search and the result of the search are logged.

SMTP-connection

SMTP log of the ixi-UMS Mail Server Connector to the mail server. Connection failures to the mail server are logged.

Message ID

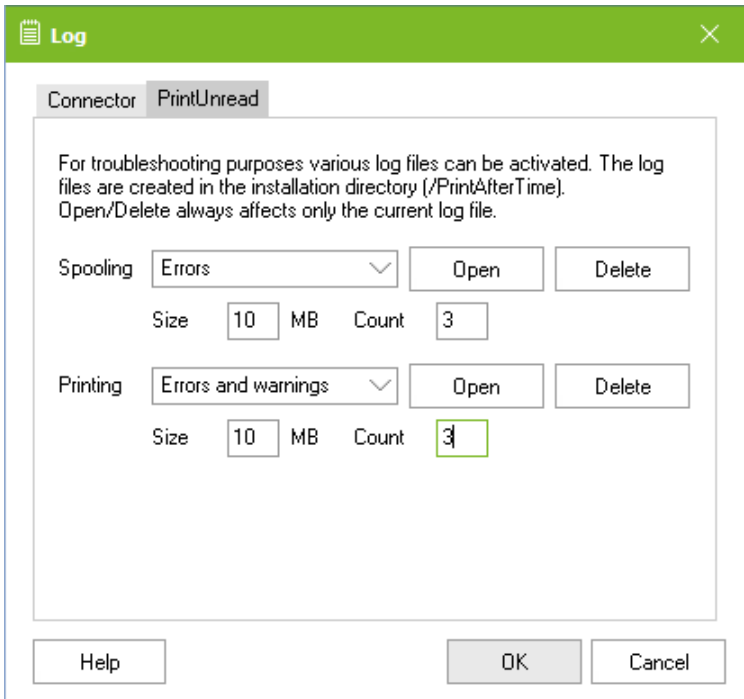
In this separate log, the message ID of every inbound and outbound message are logged.

4.2.8.2 PrintUnread

If the feature "PrintUnread" is activated, the Spooling and printing can be logged in the mistake case. It can be fixed, how big the log files should become and how many files should be preserved.

Count: 0 = Logfiles are not deleted
Size: 0 = Log file becomes infinitely big

The topical log file can be opened about the badge "opening" and be removed about the badge "extinguishing". Older log files must be opened in the file system.



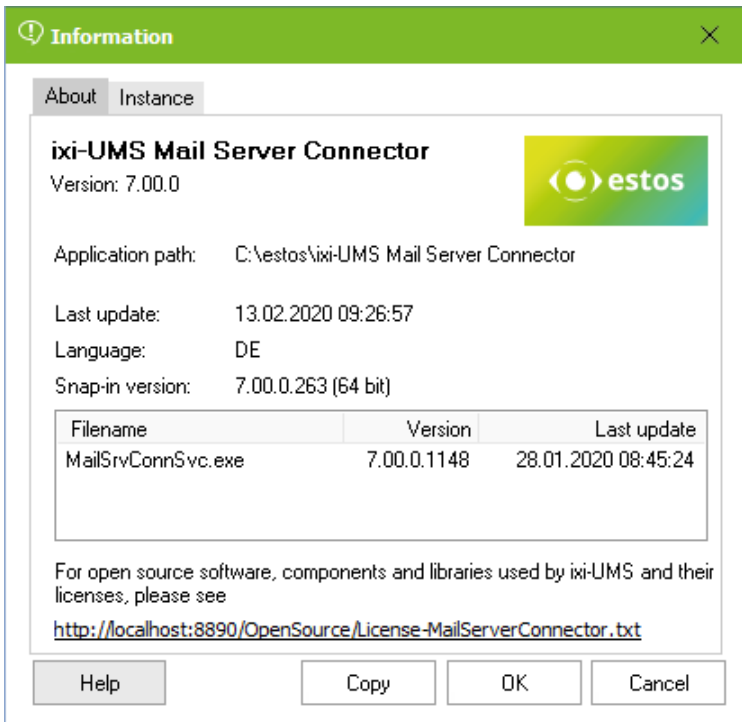
Logs should be activated only in case of an error or maximum with priority "Errors".

In the log "ixiActionAfterTime.log" mistakes are logged by the handing over near the printer or in the suitable order line.

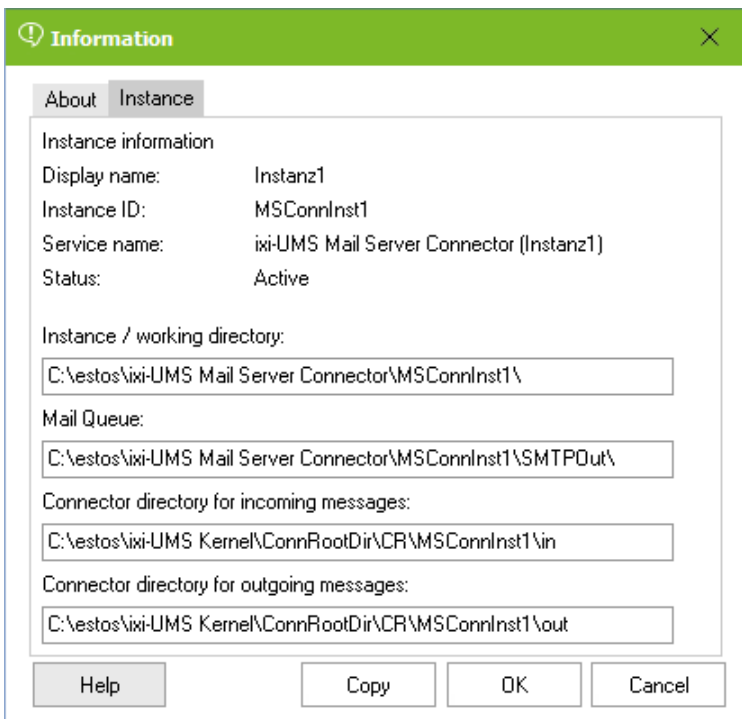
In the **Debugmode** the settings and the detailed files are logged, in addition.

In "ixiPrintFaxJob.log" the handing over is logged near the printer and the (mistakes) returned by the printer announcements.

4.3 Information



Information about installed file versions of the respective instance is displayed here.



The "Instance" tab lists the names and paths of each instance.

5 ixi-UMS User Management

All the ixi-UMS User information (e.g. sender number, send permission, etc.) are stored in a field/attribute in the LDAP-database. The options available are independent of the LDAP-database, which is used.

For outgoing messages, the permissions, sender number, header information and additional optional settings are read out from this attribute.

Inbound Routing means the delivery of UMS messages into the e-mail inbox of the user. The ixi-UMS Mail Server Connector searches the call number coming in at the ixi-UMS Kernel in the user data base by LDAP.

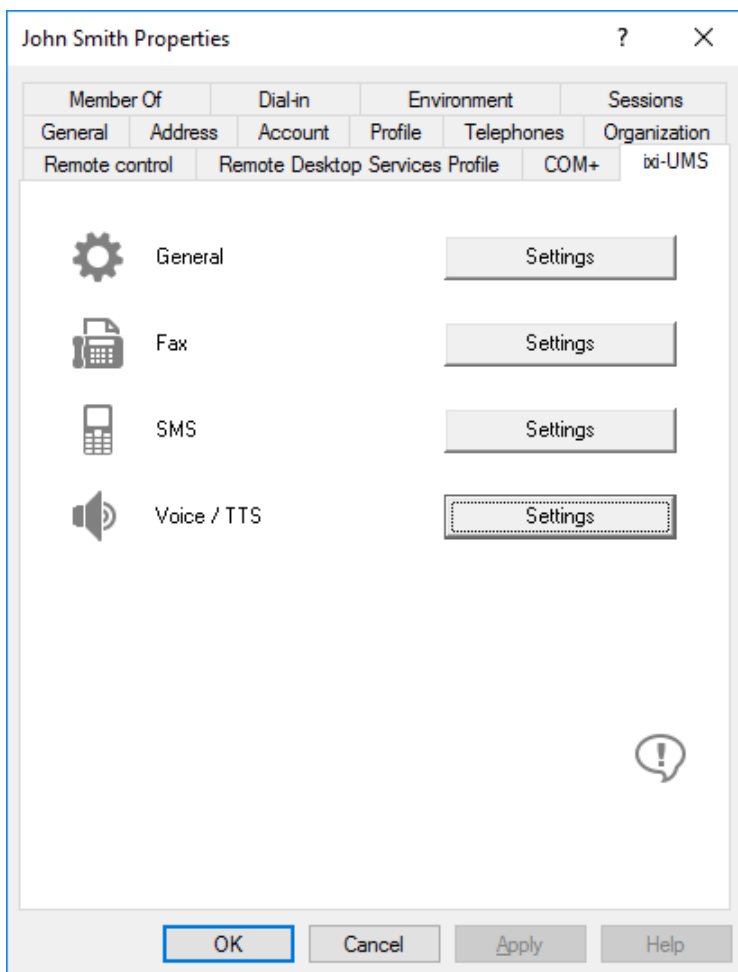
The search parameters for the fax recipient number depend on the database used and are entered by the setup. The fax recipient number can generally be entered in each unique attribute. In that case the must be adapted.

5.1 Microsoft Active Directory

The user management of the ixi-UMS users is done by means of "Active Directory User and Computer" snap-in. The user properties dialog is extended by an additional page "ixi-UMS".

Only **one** Display Specifier (ixi-UMS tab) can be registered on a computer. Each Display Specifier can manage the ixi-UMS users of **one** instance. The instance must be selected during registration.

If several instances are managed in the Active Directory, the ixi-UMS card must be registered for each instance on a different computer.



Here the settings per service can be made, if they should be different from the settings on the ixi-UMS server.

The settings of the users overwrite the settings on the server

If these entries are not deposited at the user, the [default permissions](#) entered at the ixi-UMS Mail Server Connector and ixi-UMS Kernel apply. In this case, "System default" is displayed.

Users can change some of the settings individually via the "ixi-UMS User Settings" web page provided by ixi-UMS Portal Server.

On the Server on that the ixi-UMS Mail Server Connector is installed, this tab is automatically registered, presumed that the permissions are sufficient and the "Active Directory Users and Computers" SnapIn is installed.

If the "ixi-UMS tab" shall be available on other machines, it must be registered subsequently.

5.1.1 General Settings

Here, the "ISDN Originating Address" as well as "Coverpage" and "Cost Center" are determined. These entries are optional.

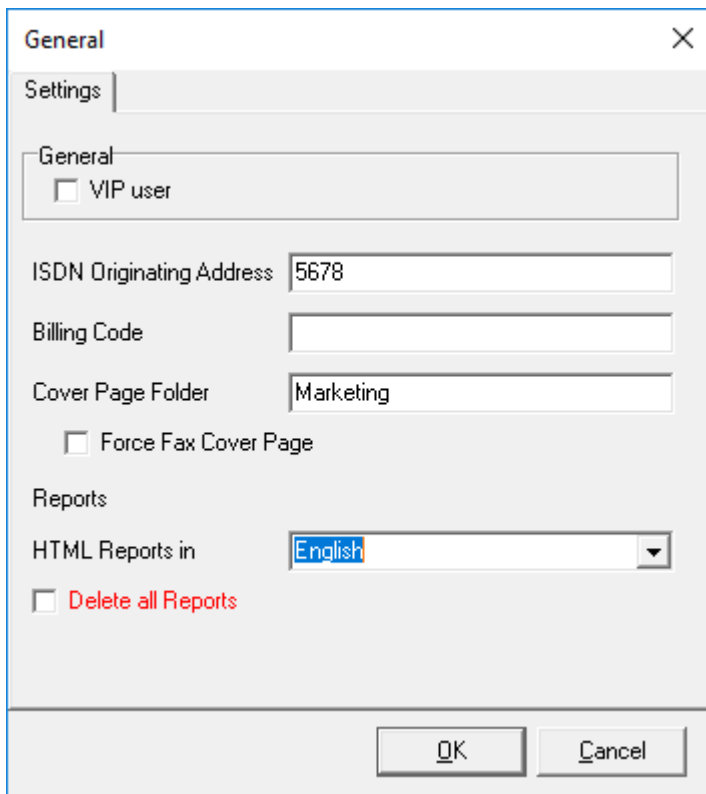
VIP user:

When the ixi-UMS Mail Server Connector runs in "Emergency-Mode", this user can still send messages.

ISDN Originating Address:

The calling party number, that is signaled for outgoing ixi-UMS Messages for this user. By default, the number entered under "Fax sender number" is signaled.

If SMS-in fixed network is used, a sender information valid for the ISDN connection **must be stored here**, if the fax sender number is not a valid number for the telephone system or the connection



Billing Code:

Any string. Is logged in the journal of the ixi-UMS Kernel and can be used for charging information.

Cover Page

Here you enter the directory name of a cover page sub-directory. It contains files, that can be used as fax coversheet, fax layout and as header file for outgoing short messages (SMS). See also the ixi-UMS Kernel manual.

Optionally it can be set **Force Cover Page** for all outgoing fax messages.

Reports:

The ixi-UMS Kernel reports (Non/Delivery reports), the text OCR and the information contained by the "transmitter identification", can be sent as HTML e-mail to the user. If this option [in the ixi-UMS Enterprise system activated](#), an individual presentation can be assigned to the user.

Optionally **all reports can be deleted**. In this case the user gets no more positive and negative delivery reports. Errors that occur while processing an outgoing message keep the users informed.

If ixi-UMS Enterprise is set up so that ixi-UMS Messages and reports are only stored on the ixi-UMS server (see also [Message Store](#)), the settings for the confirmations are not relevant.

5.1.2 Fax Settings

This sets the sender information and permissions for ixi-UMS faxes.

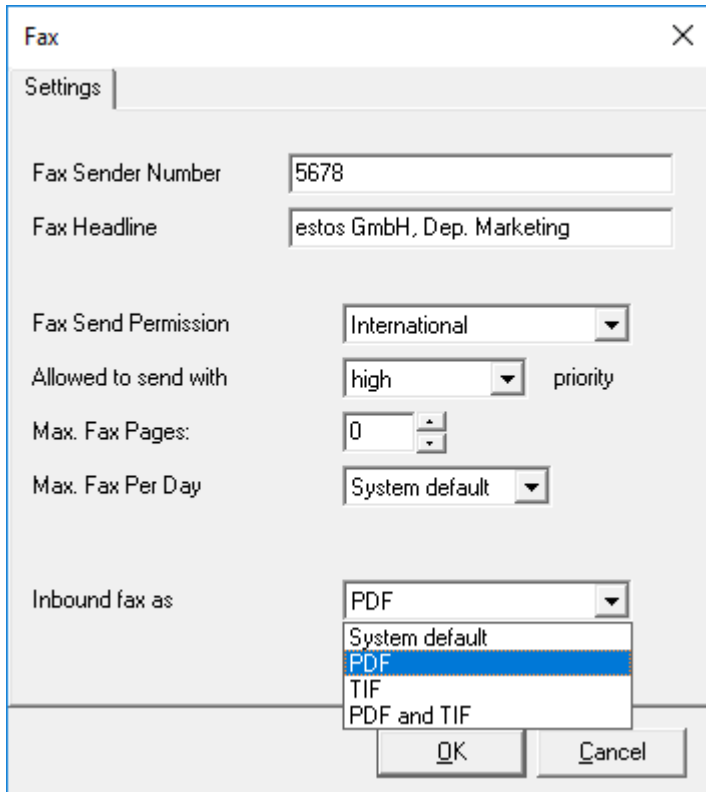
Fax Sender Number:

The number in the headline of an outgoing fax. This number is an extension number. It is then combined with the licensing information of the ixi-UMS Kernel.

Example:

When a sender ID +49 is entered at the ixi-UMS Kernel in the license information, you have to enter the following here:

<area code without 0> <complete phone number>



Fax Headline:

This entry overwrites the sender ID in the ixi-UMS Kernel. If the users are to be able to enter these individually, they make the browser-based website ixi-UMS User settings available to the user via the ixi-UMS User Portal.

Fax Send Permissions:

Here it is entered how "far" a user is allowed to send UMS messages.

Allowed to send with priority:

If the priority stated in the message exceeds the priority entered here, the effective priority is limited to the one entered here.

Max. Fax Pages:

If the user wants to send a fax with more pages than entered here, he gets an error message. The value 0 means "System default"= (max. number of pages defined in the ixi-UMS Render Connector).

Max. Fax Per Day:

You can determine how many messages per message type the user is allowed to send per day. In order to activate this limitation, the score must be activated in the ixi-UMS Kernel Configuration at "AddOns - Daily Limit".

The settings of the users overwrite the settings at the server.

System default: The number set at the ixi-UMS Kernel is valid.

Infinite: Independent of the configuration at the ixi-UMS Kernel, the user is allowed to send any number of messages.

Custom: The number of the messages allowed must be entered.

Inbound fax as

Here you can specify whether the user receives the ixi-UMS faxes as TIF and / or PDF attachments.

Note the required setting in the ixi-UMS Render Connector.

If ixi-UMS Enterprise is set up so that ixi-UMS Messages and reports are only stored on the ixi-UMS server (see also [Message Store](#)), the settings for "Inbound fax as" is not relevant.

5.1.3 SMS Settings

If the ixi-UMS Enterprise system is set up for sending SMS, you can set different permission from the server here.

SMS

General

SMS Send Permission System default

Max. SMS Per Day System default

Depending of the selected method and provider, a sender number can be sent.
For this user will be submitted:

In case of SMS via HTTP: The mobile phone number entered for this user.

In case of SMS via ISDN/VoIP: The ISDN originating address entered at ixi-UMS otherwise the ixi-UMS fax sender number.

If a GSM data adapter is used for sending SMS the phone number of the SIM card is sent.

OK Cancel

SMS Send Permissions:

Here it is entered how "far" a user is allowed to send SMS messages.

Max. SMS Per Day:

You can determine how many SMS per the user is allowed to send per day.

In order to activate this limitation, the score must be activated in the ixi-UMS Kernel Configuration at "AddOns - Daily Limit".

The settings of the users overwrite the settings at the server.

System default: The number set at the ixi-UMS Kernel is valid.

Infinite: Independent of the configuration at the ixi-UMS Kernel, the user is allowed to send any number of messages.

Custom: The number of the messages allowed must be entered.

5.1.4 Voice+TTS Settings

Voice / TTS

General

Voice Send Permission System default

Max. Voice Per Day System default

The settings for using the service Voice in conjunction with the ixi-UMS Voice-Mail Server are defined on the user tab "ixi-UMS Voice-Mailbox".

Please note:
Also for sending TTS messages the service "Voice" at the ixi-UMS Kernel must be licensed.

OK Cancel

Voice Send Permissions:

Here it is entered how "far" a user is allowed to send Voice- or TTS messages.

Max. Voice/TTS Per Day:

You can determine how many Voice and TTS messages (additively) per the user is allowed to send per day.

In order to activate this limitation, the score must be activated in the ixi-UMS Kernel Configuration at "AddOns - Daily Limit".

The settings of the users overwrite the settings at the server.

System default: The number set at the ixi-UMS Kernel is valid.

Infinite: Independent of the configuration at the ixi-UMS Kernel, the user is allowed to send any number of messages.

Custom: The number of the messages allowed must be entered.

5.1.5 Assign ixi-UMS number

Inbound Routing means the delivery of UMS messages to the e-mail inbox of the user.

By means of LDAP, the ixi-UMS Mail Server Connector looks for the call number received by the ixi-UMS Kernel in the Active Directory.

When the UMS number is found, the ixi-UMS Mail Server Connector reads out the accompanying e-mail address of the user and transmits the message to the Exchange Server.

Principally, every user in the company can get one or several fax-, voice- and SMS-numbers assigned therewith.

By Default, every user gets a UMS recipient number, on that all 3 sorts of messages can be received.

The assignment is done directly in the Active Directory. However, the user does not get the extension assigned but an E.164 telephone number.

Remark:

An E.164 telephone number is a number in the so-called canonical format, this means it contains country code, area code, phone number and extension information.

Example: +49 8142 4799123 or +4981424799123 (without all spaces)

By default, the country code, area code and call number depend on the ixi-UMS Kernel site settings. For further information on how the phone number is formed, please refer to the ixi-UMS Kernel Manual under HowTo - Site Settings - Creating the Call Numbers.

When the PBX transmits the recipient number in E.164 format (see ixi-UMS Kernel Manual - ISDN & PBX) or when a call number converter is deployed, you may have to enter the recipient number without blanks.

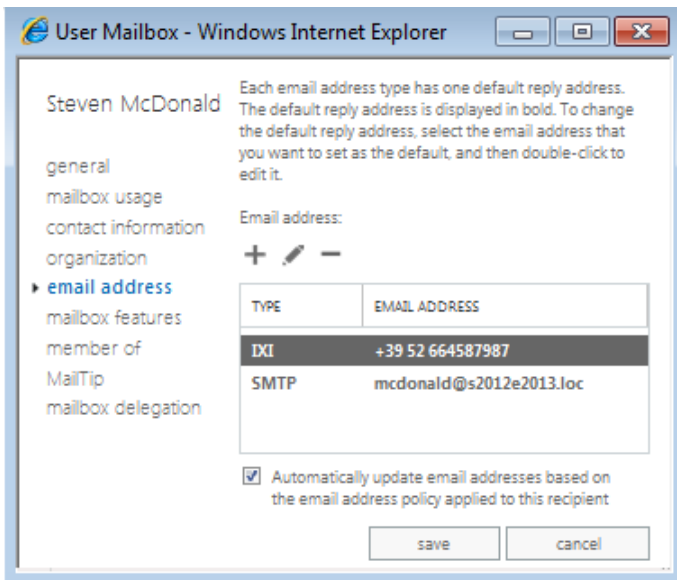
You can make use of the following fields for assigning the UMS number:

The screenshot shows the 'John Smith Properties' dialog box with the 'Telephones' tab selected. The 'Telephone numbers' section contains several input fields: 'Home:', 'Pager:', 'Mobile:', 'Fax:', and 'IP phone:'. Each field has an 'Other...' button to its right. The 'Fax:' field is highlighted with a red rectangular border and contains the text '+41 5 45489756'. Below the telephone fields is a 'Notes:' section with a large empty text area. At the bottom of the dialog are buttons for 'OK', 'Cancel', 'Apply', and 'Help'.

1. The **Standard Fax Attribute** and Fax - **Other** (LDAP description: facsimileTelephoneNumber, otherFacsimileTelephoneNumber)

The advantage of this field is that you can assign the same UMS-number to several users, because there is no check for duplicates.

Please take into account, however, that a fax generally is considered to be an "original". When several persons shall get access to an inbound UMS message, it is recommendable to set up a "Public Folder" as recipient.

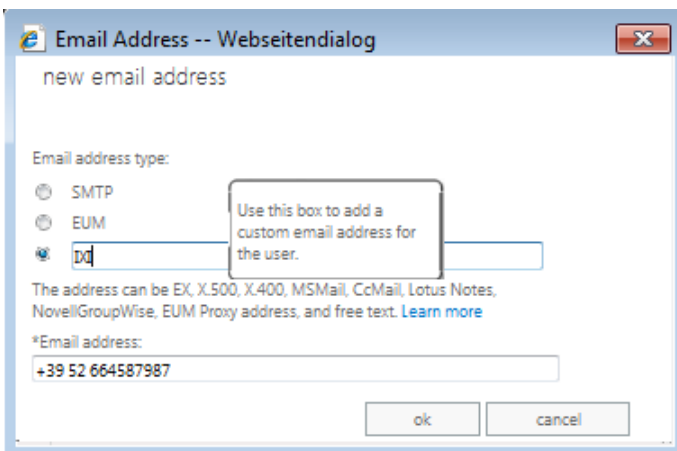


2. Please make use of **custom e-mail addresses of the type IXI** (recommended)

A Mailserver automatically checks whether such an address has already been assigned to another user.

When you want to distribute incoming UMS messages to several users, please set up a distribution list, to that you assign the address.

You can also assign such an address to public folders and therewith distribute UMS messages to them.



Start the "Exchange-Management Console" and navigate to "recipients". Open the user mailbox and navigate to "email Address". Click on the **+**-sign to create a new email address type "**IXI**". Type in the UMS number in "Email address".

Other possibilities for the addressing are only supported because of downward compatibility with older Connector versions and are explicitly NOT recommended:

- **SMTP Addresses** of the kind <UMS Nummer>@<your domain>
- **Custom Addresses** of the type **IFAX**

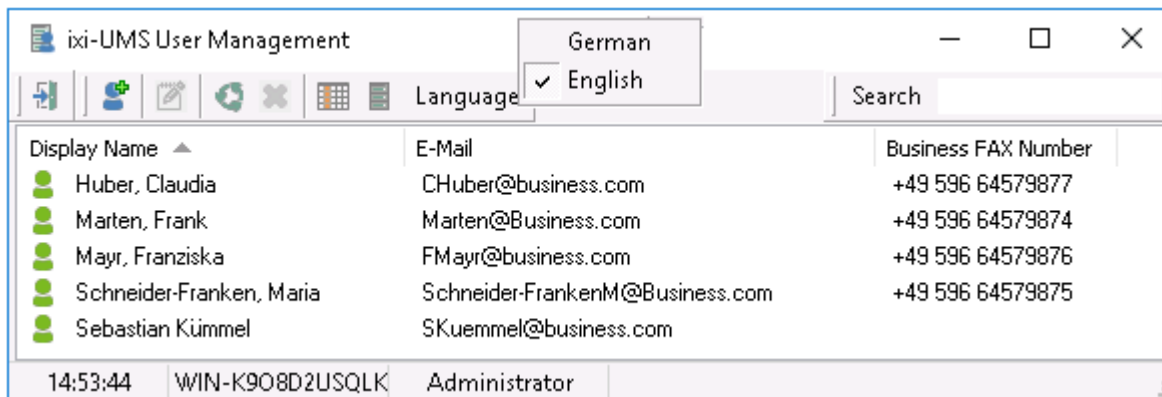
Note:

If the fax recipient number is to be searched in another field, the search string must be adapted.

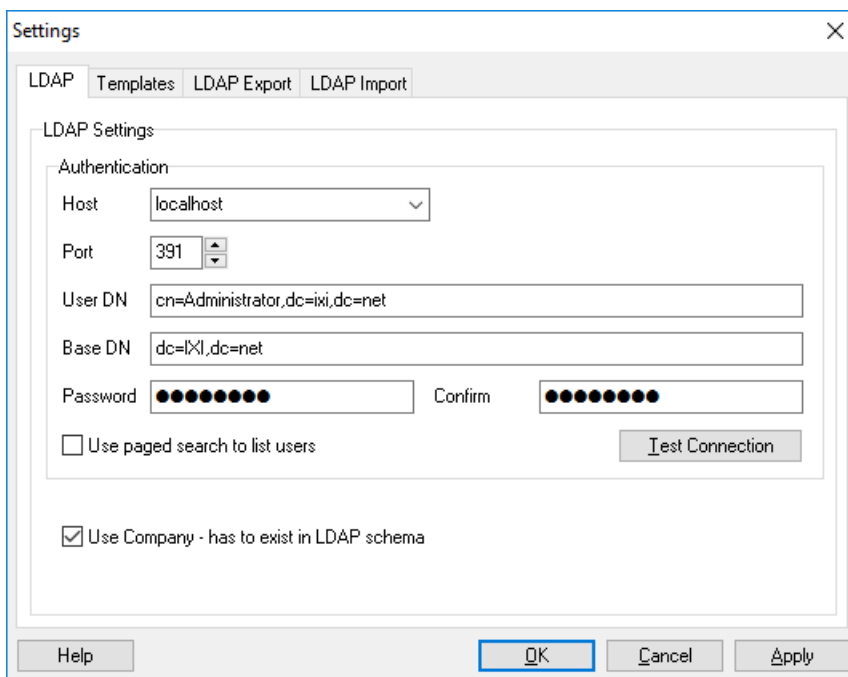
5.2 ixi-UMS User Management Console

In order to be able to make use of the ixi-UMS User Management Console, it must be installed together with the ixi-Framework Setup.

The ixi-UMS User Management Console can be opened after the installation via the icon at the desktop or via Start - Programs - estos - ixi-Framework.



Display Name	E-Mail	Business FAX Number
Huber, Claudia	CHuber@business.com	+49 596 64579877
Marten, Frank	Marten@Business.com	+49 596 64579874
Mayr, Franziska	FMayr@business.com	+49 596 64579876
Schneider-Franken, Maria	Schneider-FrankenM@Business.com	+49 596 64579875
Sebastian Kümmel	SKuemmel@business.com	



Settings

LDAP Templates LDAP Export LDAP Import

LDAP Settings

Authentication

Host: localhost

Port: 391

User DN: cn=Administrator,dc=ixi,dc=net

Base DN: dc=ixi,dc=net

Password: [masked] Confirm: [masked]


Use paged search to list users

Use Company - has to exist in LDAP schema

Test Connection

Help OK Cancel Apply

Remark:

If not the local Open LDAP data base is used, the connection settings can be changed via the button 

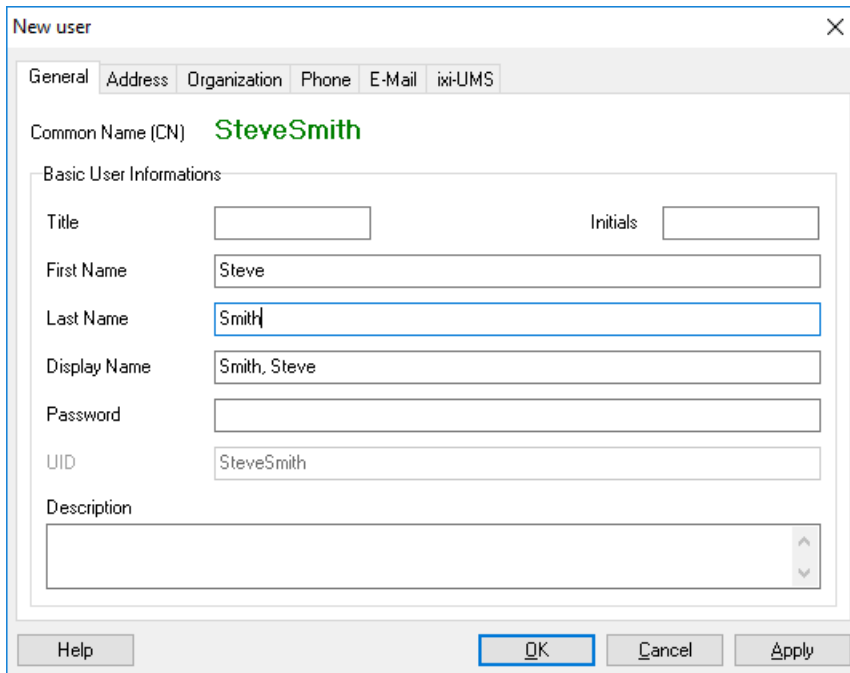
You have to take care, however, that the used LDAP-server contains the same data, as otherwise, the storage of the user data fails.

If you want to use other fields, please read the Additional Information "User Administration with Other LDAP" in the ixi-Framework Manual .

Further information about the ixi-UMS User Administration can be found in the ixi-Framework Manual.

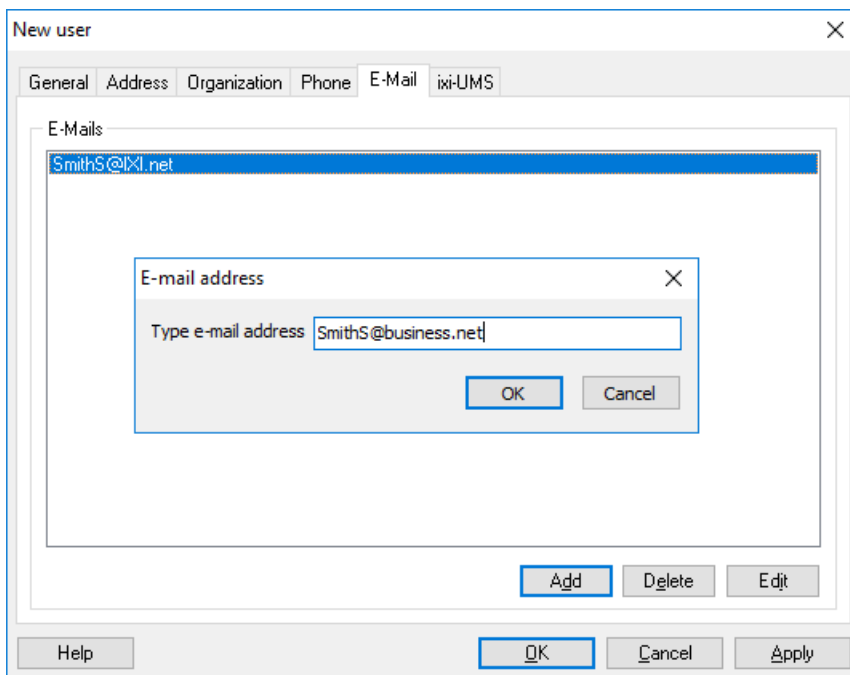
5.2.1 Create User

A new user can be created via the button .



The screenshot shows the 'New user' dialog box with the 'General' tab selected. The 'Common Name (CN)' field is filled with 'SteveSmith'. Below it, the 'Basic User Informations' section contains several input fields: 'Title' and 'Initials' are empty; 'First Name' is 'Steve'; 'Last Name' is 'Smith'; 'Display Name' is 'Smith, Steve'; 'Password' is empty; 'UID' is 'SteveSmith'; and 'Description' is an empty text area. At the bottom, there are 'Help', 'OK', 'Cancel', and 'Apply' buttons.

After having entered the first name and the last name, the user can be stored via the button "Apply".



The screenshot shows the 'New user' dialog box with the 'E-Mail' tab selected. The 'E-Mails' list contains one entry: 'SmithS@ixl.net'. A small dialog box is open over the list, titled 'E-mail address', with a text input field containing 'SmithS@business.net' and 'OK' and 'Cancel' buttons. At the bottom of the main dialog, there are 'Add', 'Delete', and 'Edit' buttons, along with 'Help', 'OK', 'Cancel', and 'Apply' buttons.

Moreover, a valid e-mail address has to be entered at the user.

Please double-click on the automatically generated entry in the tab "E-Mail" and enter the e-mail address from the mail server.

It is then stored with "OK".

5.2.2 UMS Settings

The screenshot shows a dialog box titled "User - Smith, Steve" with a close button (X) in the top right corner. The "ixi-UMS" tab is selected, showing the following settings:

- Voice mailbox: system default, enabled, disabled. A "Reset" button is to the right.
- Access Mode: System default, Login via telephone (only profile settings), No login via telephone, Login via telephone and remote inquiry.
- Buttons for configuration: "Voice Mail", "Remote Inquiry", "Mailbox", "Notifications", and "UMS".
- Checkboxes: All ixi-UMS installations are version 6.60 or newer.
- Bottom buttons: "Help", "OK", "Cancel", and "Apply".

In the tab "ixi-UMS", the permissions and properties of the users concerning UMS can be entered.

If ixi-UMS Voice-Mail Server has already been installed, the other buttons are active. Please read the ixi-UMS Voice-Mail Server Manual.

In order to perform the settings, please click on the button "UMS".

5.2.2.1 General

Here, the sender information as well as "Coverpage" and "Cost Center" are determined. These entries are optional.

The screenshot shows a dialog box titled "UMS Configuration" with a close button (X) in the top right corner. The "General" tab is selected, showing the following settings:

- ISDN Originating Address: 5678
- Billing Code: (empty field)
- Cover Page: Marketing
- Force Cover Page
- Reports: HTML Reports in: System default (dropdown menu with options: System default, Dutch, English, French, German, Italian, Portuguese, Spanish)
- Delete all Reports
- Bottom buttons: "OK", "Cancel".

ISDN Originating Address:

The calling party number, that is signaled for outgoing UMS messages for this user.

If SMS-in fixed network is used, a sender information valid for the ISDN connection **must be stored here**, if the fax sender number is not a valid number for the telephone system or the connection

Billing Code:

Any string. Is logged in the journal of the ixi-UMS Kernel and can be used for charging information.

Cover Page

Here you enter the directory name of a cover page sub-directory. It contains files, that can be used as fax coversheet, fax layout and as header file for outgoing short messages (SMS).

Optionally it can be set **Force Cover Page** for all outgoing fax messages.

Non/Delivery reports:

The ixi-UMS Kernel reports, the text OCR and the information contained by the "transmitter identification", can be sent as HTML e-mail to the user. If this option [in the ixi-UMS server is activated](#), an individual presentation can be assigned to the user.

Optionally **all reports can be deleted**. In this case the user gets no more positive and negative delivery reports. Errors that occur while processing an outgoing message keep the users informed.

If ixi-UMS Enterprise is set up so that ixi-UMS Messages and reports are only stored on the ixi-UMS server (see also [Message Store](#)), the settings for the confirmations are not relevant.

5.2.2.2 Fax Settings

This sets the sender information and permissions for ixi-UMS faxes.

Fax Sender Number:

The number in the headline of an outgoing fax. This number is an extension number. It is then combined with the licensing information of the ixi-UMS Kernel.

Example:

When a sender ID +49 is entered at the ixi-UMS Kernel in the license information, you have to enter the following here:
<area code without 0> <complete phone number>

Fax Headline:

This entry overwrites the sender ID in the ixi-UMS Kernel. If the users are to be able to enter these individually, they make the browser-based website ixi-UMS User settings available to the user via the ixi-UMS User Portal.

The screenshot shows the 'UMS Configuration' dialog box with the 'Fax' tab selected. The 'Fax Sender Number' is set to '5678' and the 'Fax Headline' is 'estos GmbH, dep. Marketing'. The 'Send permission' is set to 'System default'. The 'Allowed to send with' is set to 'high' priority. The 'Max. Fax Pages' is set to '0' and the 'Max. Fax Per Day' is set to 'System default'. The 'Inbound fax as' dropdown menu is open, showing options: PDF, System default, PDF, TIF, and PDF and TIF. The 'OK' and 'Cancel' buttons are visible at the bottom of the dialog.

Fax Permissions:

Here it is entered how "far" a user is allowed to send UMS messages.

Allowed to send with priority:

If the priority stated in the message exceeds the priority entered here, the effective priority is limited to the one entered here.

Max. Fax Pages:

If the user wants to send a fax with more pages than entered here, he gets an error message.

The value 0 means "System default"= (max. number of pages defined in the ixi-UMS Render Connector).

Max. Fax Per Day:

You can determine how many messages per message type the user is allowed to send per day. In order to activate this limitation, the score must be activated in the ixi-UMS Kernel Configuration at "AddOns - Daily Limit".

The settings of the users overwrite the settings at the server.

System default: The number set at the ixi-UMS Kernel is valid.

Infinite: Independent of the configuration at the ixi-UMS Kernel, the user is allowed to send any number of messages.

Custom: The number of the messages allowed must be entered.

Inbound fax as

Here you can specify whether the user receives the ixi-UMS faxes as TIF and / or PDF attachments.

Note the required setting in the ixi-UMS Render Connector.

If ixi-UMS Enterprise is set up so that ixi-UMS Messages and reports are only stored on the ixi-UMS server (see also [Message Store](#)), the settings for "Inbound fax as" is not relevant.

5.2.2.3 SMS Settings

If the ixi-UMS Enterprise system is set up for sending SMS, you can set different permission from the server here.

The screenshot shows the 'SMS' tab of the 'UMS Configuration' dialog. It features two dropdown menus: 'Send permission' and 'Max. SMS Per Day', both set to 'System default'. Below these are three paragraphs of explanatory text regarding sender numbers for different SMS methods (HTTP, ISDN/VoIP, GSM). At the bottom are 'OK' and 'Cancel' buttons.

SMS Permissions:

Here it is entered how "far" a user is allowed to send SMS messages.

Max. SMS Per Day:

You can determine how many SMS per the user is allowed to send per day.

In order to activate this limitation, the score must be activated in the ixi-UMS Kernel Configuration at "AddOns - Daily Limit".

The settings of the users overwrite the settings at the server.

System default: The number set at the ixi-UMS Kernel is valid.

Infinite: Independent of the configuration at the ixi-UMS Kernel, the user is allowed to send any number of messages.

Custom: The number of the messages allowed must be entered.

5.2.2.4 Voice+TTS Settings

The screenshot shows the 'Voice / TTS' tab of the 'UMS Configuration' dialog. It features two dropdown menus: 'Send permission' and 'Max. Voice Per Day', both set to 'System default'. Below these are two paragraphs of explanatory text regarding voice and TTS settings. At the bottom are 'OK' and 'Cancel' buttons.

Send Permissions:

Here it is entered how "far" a user is allowed to send Voice- or TTS messages.

Max. Voice/TTS Per Day:

You can determine how many Voice and TTS messages (additively) per the user is allowed to send per day.

In order to activate this limitation, the score must be activated in the ixi-UMS Kernel Configuration at "AddOns - Daily Limit".

The settings of the users overwrite the settings at the server.

System default: The number set at the ixi-UMS Kernel is valid.

Infinite: Independent of the configuration at the ixi-UMS Kernel, the user is allowed to send any number of messages.

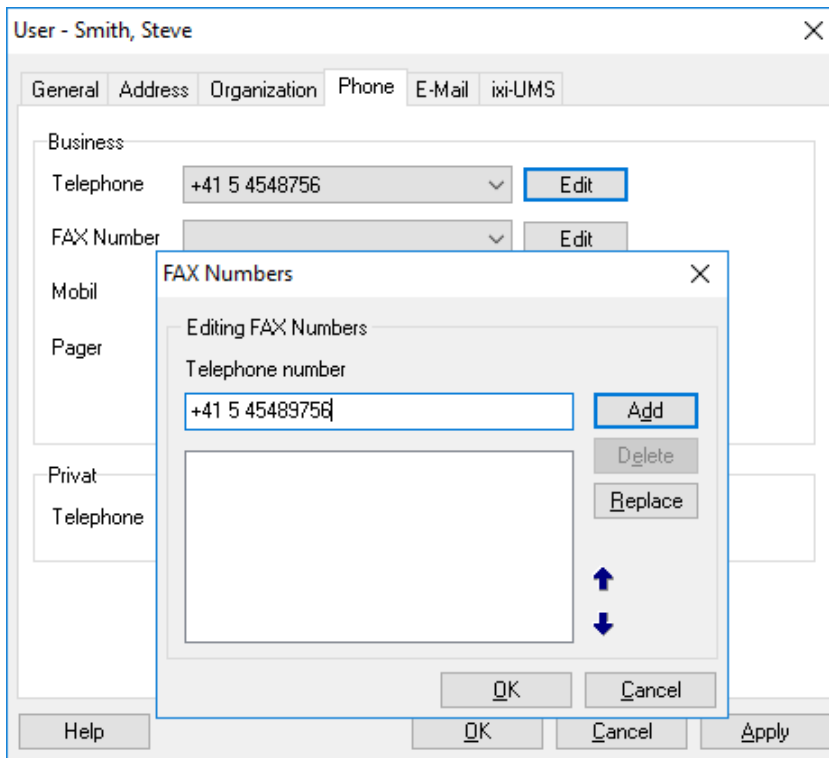
Custom: The number of the messages allowed must be entered.

5.2.3 Assign ixi-UMS number

Inbound Routing means the delivery of UMS messages to the e-mail inbox of the user. By means of LDAP, the ixi-UMS Mail Server Connector looks for the call number received by the ixi-UMS Kernel in the LDAP-Database.

When the UMS number is found, the ixi-UMS Mail Server Connector reads out the accompanying e-mail address of the user and transmits the message to the Exchange Server.

Principally, every user in the company can get one or several fax-, voice- and SMS-numbers assigned therewith. By Default, every user gets a UMS recipient number, on that all 3 sorts of messages can be received.



In order to be able to receive messages, a valid fax recipient number has to be entered at the user in the tab "Phone" at **FAX Number.**

(LDAP Attribute: facsimileTelephoneNumber)

When clicking on the button "Edit", the call number can be entered.

Via "Add", it is assigned to the user.

Remark:

The call number must be entered in the international format. Characters like () / - are NOT read out.

Example:

+49 8142 4799123 or

+4981424799123 (without all spaces)

Remark:

An E.164 telephone number is a number in the so-called canonical format, this means it contains country code, area code, phone number and extension information.

Example: +49 8142 4799123 or +4981424799123 (without all spaces)

By default, the country code, area code and call number depend on the ixi-UMS Kernel site settings. For further information on how the phone number is formed, please refer to the ixi-UMS Kernel Manual under *HowTo - Site Settings - Creating the Call Numbers.*

When the PBX transmits the recipient number in E.164 format (see ixi-UMS Kernel Manual - ISDN & PBX) or when a call number converter is deployed, you may have to enter the recipient number without blanks.

Note:

If the fax recipient number is to be searched in another field, the search string must be adapted.

5.3 IBM Domino

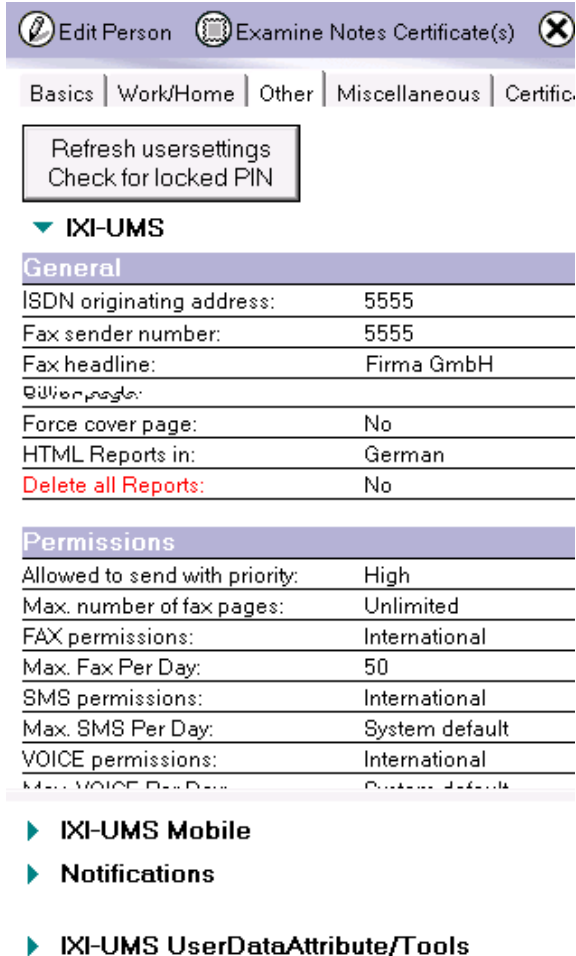
In the case of IBM Domino, an integration in the user administration of the IBM Domino Server takes place. For this, the Names & Address Book (names.nsf) is extended with fields that allow the configuration of these properties. The so-called "\$PersonalExtensibleSchema" is used that is designed for this kind of extensions.

5.3.1 Overview

After the extension of the names.nsf, the ixi-UMS fields are available in the user properties at "Other". The user administration is divided in several parts.

Refresh user settings / Check for locked PIN

By means of this option you can quickly check whether the PIN of the mobile user is locked. This is the case when the user has entered his PIN incorrectly more often than allowed.



The screenshot shows the user administration interface with the 'Other' tab selected. A button labeled 'Refresh user settings / Check for locked PIN' is highlighted. Below it, the 'IXI-UMS' section is expanded to show 'General' and 'Permissions' settings.

General	
ISDN originating address:	5555
Fax sender number:	5555
Fax headline:	Firma GmbH
Force cover page:	No
HTML Reports in:	German
Delete all Reports:	No

Permissions	
Allowed to send with priority:	High
Max. number of fax pages:	Unlimited
FAX permissions:	International
Max. Fax Per Day:	50
SMS permissions:	International
Max. SMS Per Day:	System default
VOICE permissions:	International
Max. VOICE Per Day:	System default

- ▶ IXI-UMS Mobile
- ▶ Notifications
- ▶ IXI-UMS UserDataAttribute/Tools

ixi-UMS

In this area, all the settings are done that represent the "basic features" of ixi-UMS Enterprise for the services Fax, SMS and Voice.

ixi-UMS Mobile

In this area, all the settings concerning ixi-UMS Voice with ixi-UMS Voice-Mail Server are done.

For information about this topic, please refer to the respective manual.

Notifications

In this area, all the settings around the ixi-UMS Notifier Express are configured.

For further information about this topic, please refer to the respective manual.

ixi-UMS UserDataAttribute/Tools

In this area, you can find further fields and features that are not needed normally and therefore are not treated in the manual.

Remarks:

Provided that an Notes Client is available on the PC on that the ixi-UMS Mail Server Connector is installed, the installation of the schema can already has been done during the installation.

5.3.2 ixi-UMS User Settings

General	
ISDN originating address:	5555
Fax sender number:	5555
Fax headline:	Firma GmbH
Billing code:	
Cover page:	
Force cover page:	No
HTML Reports in:	German
Delete all Reports:	No

General

- **ISDN originating address:**

The calling party number, which is signaled for this user with outgoing ixi-UMS Messages.

- **Fax sender number:**

The number that appears in the header of the sent fax. This number is an extension or MSN, which corresponds with the licensing information of the ixi-UMS Kernel.

Fax Headline:

This entry overwrites the sender ID in the ixi-UMS Kernel. If the users are to be able to enter these individually, they make the browser-based website ixi-UMS User settings available to the user via the ixi-UMS User Portal.

- **Billing code:**

Any string that is logged in the journal of the ixi-UMS Kernel in order to carry out the billing according to billing codes.

- **Message header:**

Here you state the directory name of a cover sheet subdirectory. This contains files that are used as fax cover sheet, fax layout and as header file for outgoing SMS-messages.

For further information about cover sheets and layouts, please have a look at the ixi-UMS Render Connector Manual.

Optionally it can be set **Force Cover Page** for all outgoing fax messages.

- **HTML reports in:**

The ixi-UMS Kernel reports, the text OCR and the information contained by the "transmitter identification", can be sent as HTML e-mail to the user. If this option [in the ixi-UMS Enterprise server is activated](#), an individual presentation can be assigned to the user.

Optionally **all reports can be deleted**. In this case the user gets no more positive and negative delivery reports. Errors that occur while processing an outgoing message keep the users informed.

If ixi-UMS Enterprise is set up so that ixi-UMS Messages and reports are only stored on the ixi-UMS server (see also [Message Store](#)), the settings for the confirmations are not relevant.

Permissions

- **Allow to send with priority:**

If the priority stated in the message exceeds the priority allowed for the user, the message is lowered to the allowed priority.

- **Max. number of fax pages:**

If the user wants to send a fax with more pages than the maximum number of fax pages, he receives an error message from the ixi-UMS system. The value 0 means "no limitation".

The maximum number of pages allowed is then limited by the configuration of the ixi-UMS Render Connector.

Permissions	
Allowed to send with priority:	▾
Max. number of fax pages:	Unlimited ▾
FAX permissions:	International ▾
Max. Fax Per Day:	System default ▾
SMS permissions:	International ▾
Max. SMS Per Day:	System default ▾
VOICE permissions:	International ▾
Max. VOICE Per Day:	System default ▾

- **Fax permissions:**

- **SMS permissions:**

- **VOICE permissions:**

With these options you can determine, how "far" (no, internally, locally, nationally, internationally) a user is allowed to send ixi-UMS Messages. If the permissions are not entered at the user, this user is not allowed to send any ixi-UMS messages.

- **Max. Fax / SMS / Voice Per Day:**

You can determine how many messages per message type the user is allowed to send per day. In order to activate this limitation, the score must be activated in the ixi-UMS Kernel Configuration at "AddOns - Daily Limit".

The settings of the users overwrite the settings at the server.

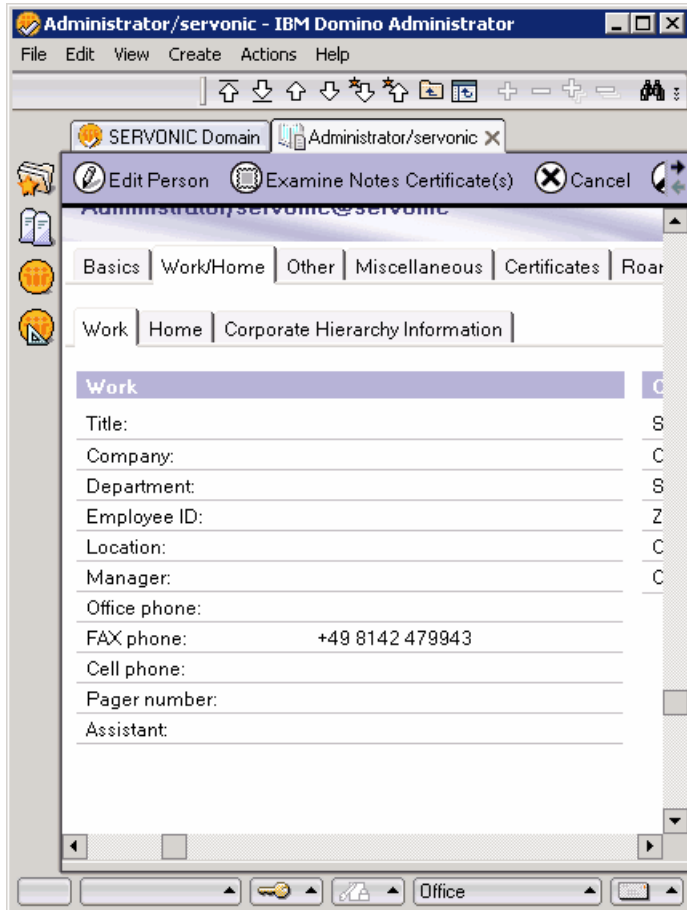
System default: The number set at the ixi-UMS Kernel is valid.

Infinite: Independent of the configuration at the ixi-UMS Kernel, the user is allowed to send any number of messages.

Custom: The number of the messages allowed must be entered.

5.3.3 Assign ixi-UMS number

Inbound Routing means the delivery of UMS messages to the e-mail inbox of the user. By means of LDAP, the ixi-UMS Mail Server Connector looks for the call number received by the ixi-UMS Kernel in the User database. When the UMS number is found, the ixi-UMS Mail Server Connector reads out the accompanying e-mail address of the user and transmits the message to the Mail Server.



Principally, every user in the company can get one or several fax-, voice- and SMS-numbers assigned therewith.

By Default, every user gets a UMS recipient number, on that all 3 sorts of messages can be received.

The assignment is done directly in the user database.

The UMS number for the user is entered in the properties at Work | Fax.

(LDAP Attribute: facsimileTelephoneNumber)

Please note that you can assign the same UMS-number to several users, because there is no check for duplicates.

The user is not assigned the extension but an **E.164 telephone number**.

Remark:

An E.164 telephone number is a number in the so-called canonical format, this means it contains country code, area code, phone number and extension information.

Example: +49 8142 4799123 or +4981424799123 (without all spaces)

By default, the country code, area code and call number depend on the ixi-UMS Kernel site settings. For further information on how the phone number is formed, please refer to the ixi-UMS Kernel Manual under HowTo - Site Settings - Creating the Call Numbers.

When the PBX transmits the recipient number in E.164 format (see ixi-UMS Kernel Manual - ISDN & PBX) or when a call number converter is deployed, you may have to enter the recipient number without blanks.

Note:

If the fax recipient number is to be searched in another field, the search string must be adapted.

6 Info

6.1 About estos



Estos GmbH, headquartered in Starnberg near Munich, Germany, is a leading manufacturer of software solutions with focus on unified communication with unified messaging and CTI (Computer Telephony Integration). The products of estos support existing standards like standard interfaces and standard hardware; proprietary solutions are avoided. The company strives to provide its customers with future-oriented product development, with a focus on integration in available environments.

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For more information about estos and its products, please visit estos website.

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6.2 Version

Software: ixi-UMS Mail Server Connector
Version: 7.00
Manual: 26.02.2021