

ixi-UMS Business Client Tools

Installation Guide

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1 Overview

The "ixi-UMS Business Client Tools" contains various tools that can be used with the ixi-UMS Business system:

1. Fax printer driver to send faxes out of different applications
2. Mail merge fax module and Auto fax module for MS Word (Word macro)
3. Fax, SMS buttons/menues for MS Outlook (add-in)
4. Sending of messages by Drag Drop (system tray)
5. Collecting faxes. This feature enables to print out of different applications (e.g. CorelDRAW file and Excel table) via the virtual printer driver and unite them in one fax (system tray)
6. Connection to MAPland SMTP-systems

The ixi-UMS Business Client Tools are optional and are installed exclusively at the clients, by no means at the ixi-UMS Business-server.

The users do not have to start an application in order to be able to make use of the ixi-UMS Business Client Tools.

The needed "Prnd.exe" is started via an entry in the Autostart. The "Prnd.exe" takes care of the "transport" of the printed fax to the mail client.

Moreover, the features of the ixi-UMS system tray are controlled via this application.

Remark for the installation at a Citrix Server:

When the ixi-UMS Client Tools are applied on a Microsoft Terminal Server with Citrix in "Published Mode" you have to take care that this Prnd.exe is started per user and finished with the log off. The system tray, of course, is not available to this user. Furthermore, the necessary "IXI-spool" directory has to be set up at an LW, on which every user has unlimited access.

1.1 Requirements

Operating system:

- Windows 7/ 8.x /10 (32/64 bit)
- Windows 2008 32 / 64 bit
- Windows 2008 R2
- Server 2012, 2012R2
- Server 2016
- Terminal server and Citrix

In general:

- Office 2007
- Office 2010 32/64bit
- Office 2013 32/64 bit
- Office 2016 32/64 bit

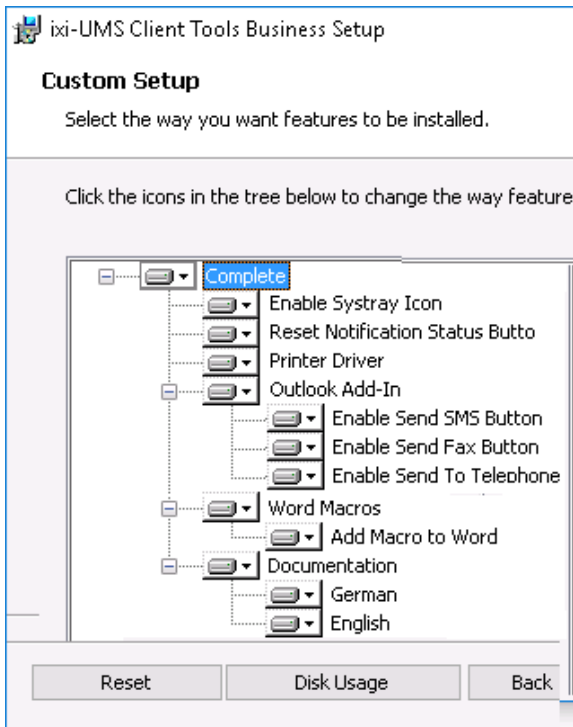
Necessary rights for installation:

- Administrator

In order to be able to install the Word macros, the Macro Security must not be set higher than "Medium".

All the users at the client must have unlimited access to the IXI-Spool directory.

1.2 Available Features



The ixi-UMS Business Client Tools consist of several features, which are optionally in parts.

The options that shall be installed can be selected at the setup.

Enable Systray Icon (Optional)	Enable systray icon. By mouse-click right, the user then can: Collect / send faxes Enter his phone extension in order to be able to forward voice mails Open the collect box See also User Manual
Reset Notification Status Button (Optional)	Extension of the Outlook add-ins and of the systray in order to reset the status of the notifications. See also User Manual.
Printer Driver	Installs the IFax-printer. Only with that the MS Words Macro can be used
Outlook Add-In (Optional)	Drop-down menu in Outlook in order to: Send faxes, SMS out of the Contacts Reset the status of the notifications at the server (MWI) - optional Send voice mails to the telephone
Word Macros (Optional)	Copies the Word macros to the hard disk. From there, they can be "installed" per user. Needed for the creation of Auto fax and mail merge fax out of MS Word
Add Macro to Word (Optional)	Installs the Word macros for the user logged in
Documentation (Optional)	Copies the documentation to the disk and inserts a respective entry in the start menu

1.3 Client Connections

During the installation, you have to state whether or not the messages are passed on to a mail system and if so, in which way. Some "usual" combinations are described in the following.

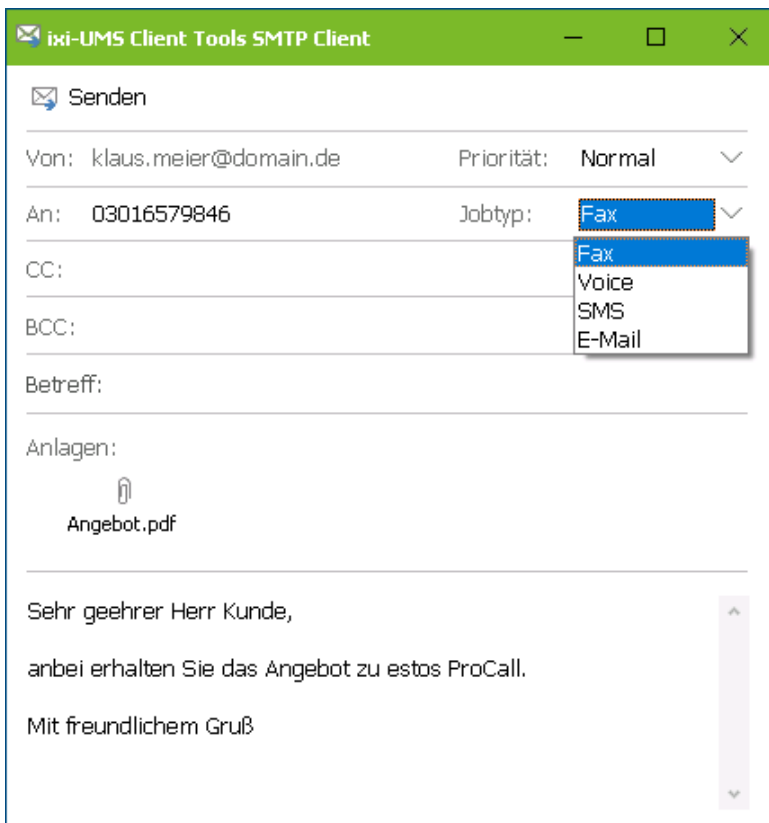
MAPI / Mail Server

MAPI Clients mean mail clients like e.g. Outlook, Outlook Express, GroupWise, Notes 8.5 and higher and Hotmail. The client is addressed, which is entered as mail client in the properties of the Internet Explorer at Programs.

The fax or the SMS is sent by the mail client.

SMTP

If you do not have an e-mail client at the workstation or do not want the faxes to be under "Sent Items", select "SMTP" on the Selection of the Messaging Platform tab. The user can open the ixi-UMS SMTP Client at any time via Start - Programs to send ixi-UMS messages.



Also after the printing via the ixi-UMS FAX printer, the ixi-UMS SMTP Client opens in that the recipient number is entered.

During the installation, you have to determine the IP-address of the mail server or of the ixi-UMS Business Server.

2 Installation via Software Distribution

The ixi-UMS Client Tools can either be installed manually at every client, via a group policy or via third party products (e.g. SMS-Server).

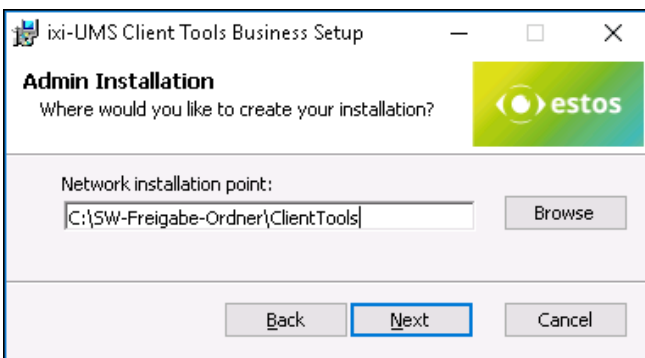
Please consider the installation of the printer drivers. With the ixi-UMS Business Client Tools, a "virtual" printer is installed. The **ixi-UMS Fax** printer has been tested and signed by Microsoft.

Note:

When an older ixi-UMS Client Tools-version has been distributed via "Batch"-file or manual, the ixi-UMS Client Tools is replaced, but is still displayed at "Programs and Features"

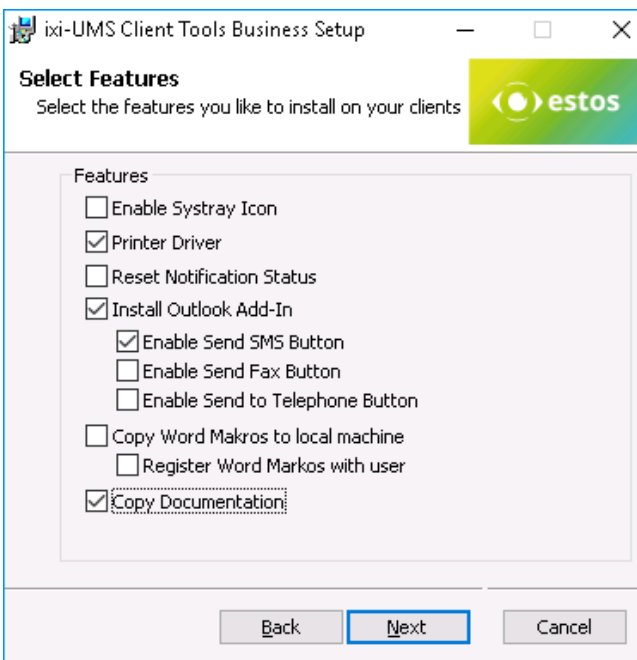
2.1 Preparation

The setup for the network installation by software distribution is a little different from the client setup. Start the installation via Start - Execute msixec /a "ixi-UMS Business Client Tools.msi".



You now have the option to state a directory where the prepared installation shall be deposited. This has to be a shared folder in the network.

After that please choose which software components shall be installed on the clients.



After that you have to choose, which software components shall be installed on the clients.

After that, Language, Messaging Platform, Addressing, Spool Folder and Allowed File Extensions are polled. Then the copy process starts.

2.2 Group Policy

For every organization unit, you can set up group policies, via that also the automatic installation of software is regulated. Start the "Active Directory User and Computer Management Console". Arrange your users or computers in a way that they have organization units.

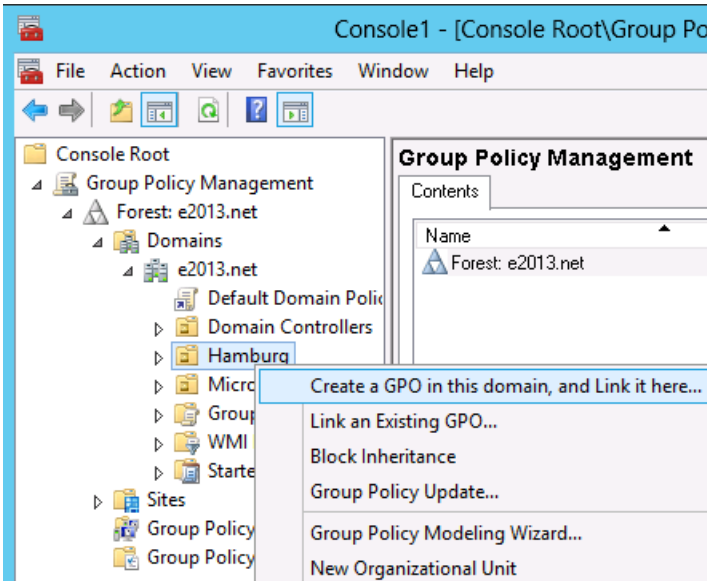
Installation per User:

The software is only available to this user. Moreover, the user guide and the start menu link are only available when this user logs in.

If another user of the same OU logs in, the software is re-installed.

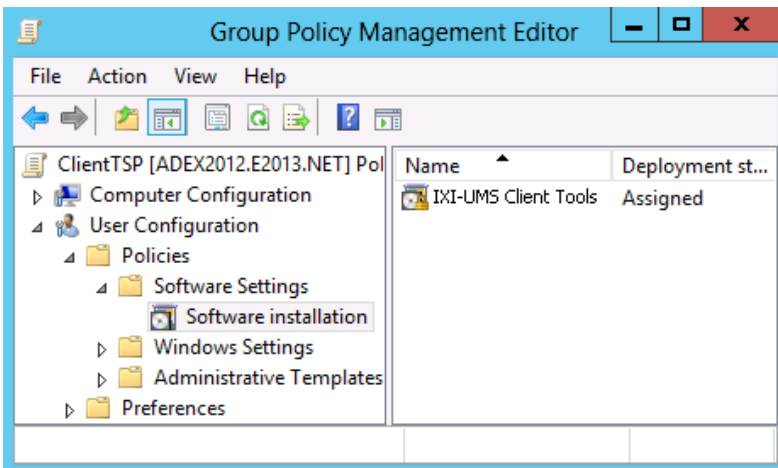
Installation per Client/Computer

The software is available to any user that logs in. Manuals and start menu links have been set up at "All Users".



Depending on the Windows Server version, please open the properties of an organization unit in AD User and Computers (Server 2003) or the Group Policy Management (since Server 2008).

Create a new group policy object. Open the group policy with Edit.

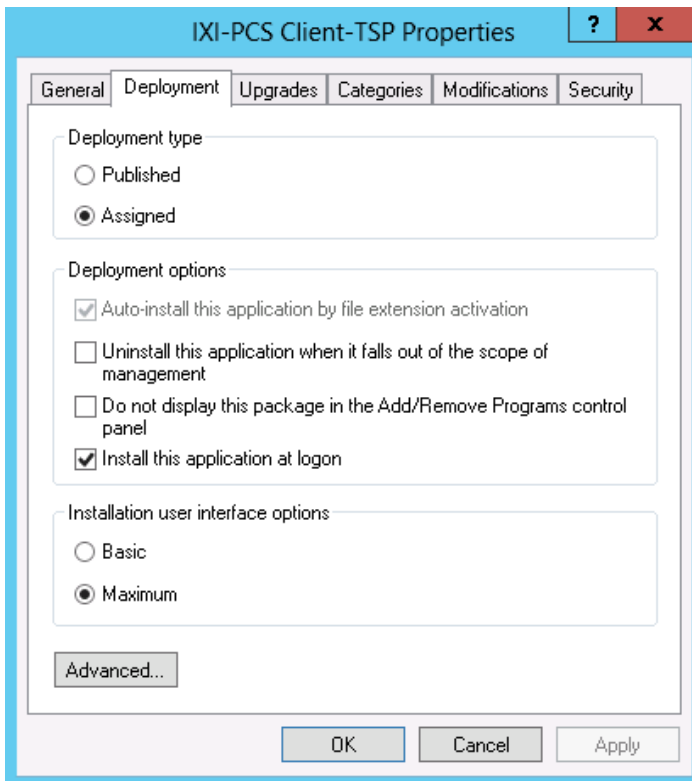


Add a new package at User Configuration or Computer Configuration - Software Settings - Software Installation.

Now select the installation package you prepared beforehand via the administrative installation.

Please select as Deployment type: Assigned

If you like to install per User: Open "Properties" and make the following settings:



Tab "Deployment"

Deployment type: Assigned
Deployment options:
Install this application at logon

When publishing the 32bit IXI-PCS Client TSP, please add:

Button "Advanced":

Uncheck the option:
"Make this 32-bit X86 application available to Win64 machines"

Confirm all settings.

When a user who is member of the selected OU logs in at his PC, the assigned application is installed automatically.

See also the respective documentation about Windows Server, Active Directory and Group Policies.

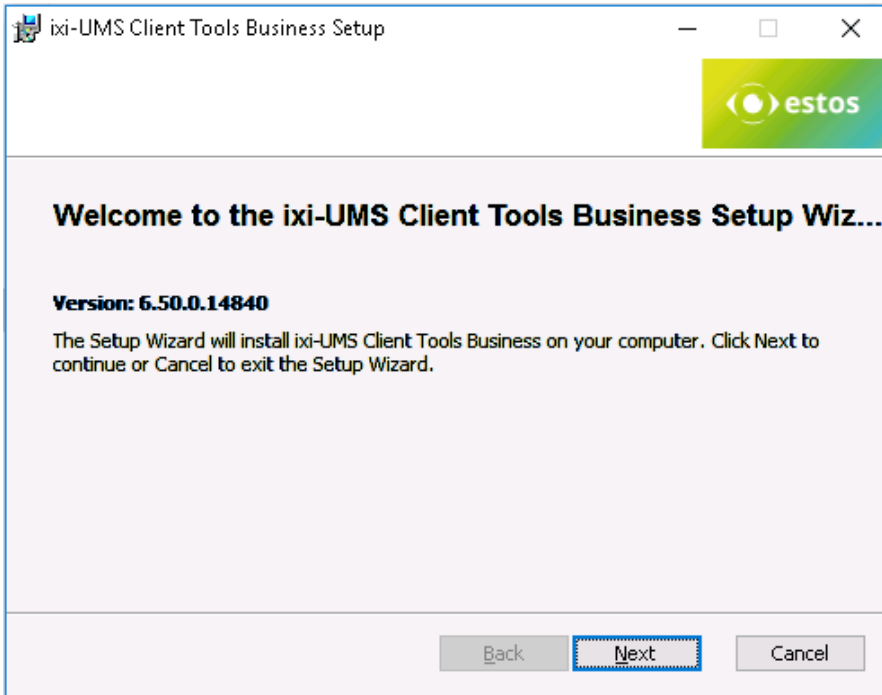
3 Single-PC installation

At the start of the setup you can select which features should be installed.

Installation at a client

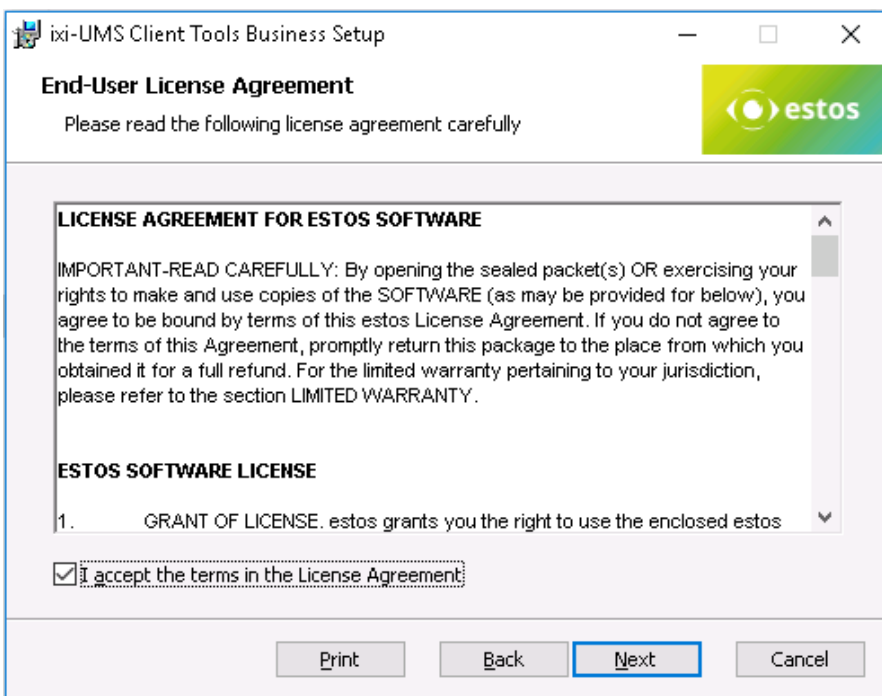
In order to be able to finish the ixi-UMS Business Client Tools installation successfully, you have to be logged in with an account that is allowed to install a local printer, e.g. the administrator.

3.1 Welcome



After the welcome-screen with general instructions, the installation starts.

3.2 License Agreement

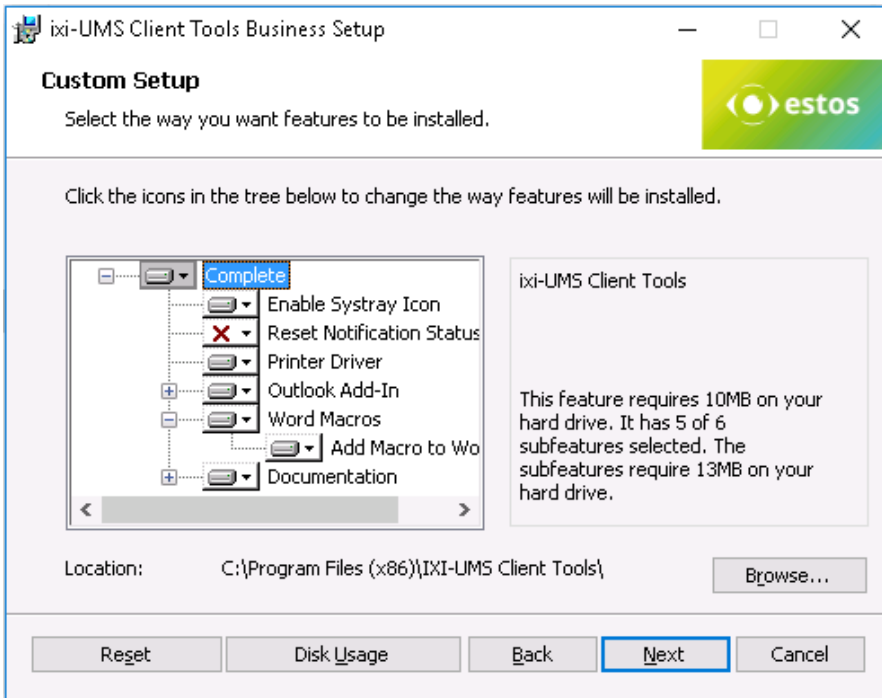


The end user's licence agreement is indicated.

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

Only then the installation can be continued.

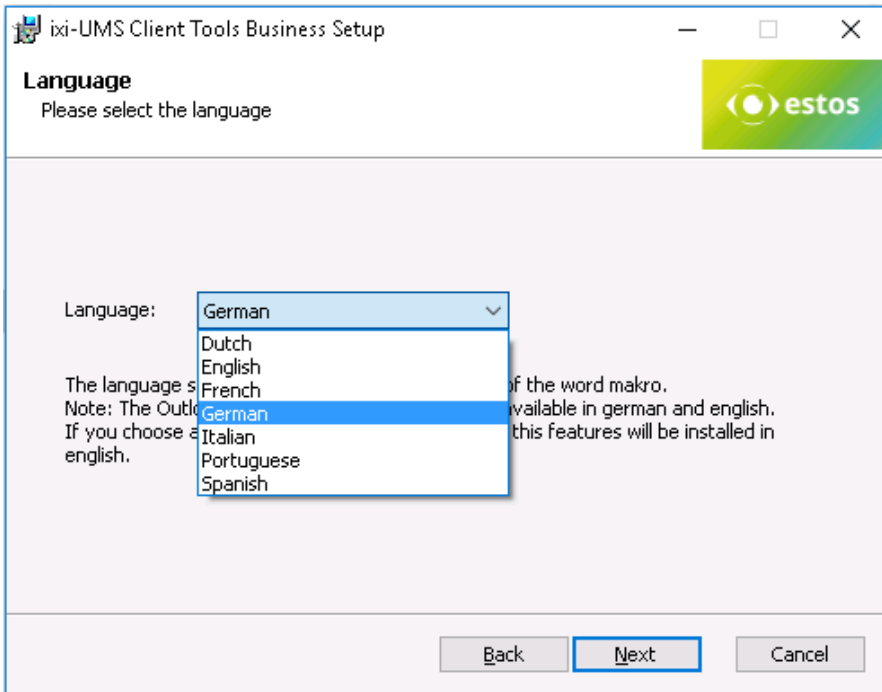
3.3 Select Features



Here you have to choose, whether and which features you want to install.

If ixi-UMS Client Tools shall not be installed in the default program directory, the path can be changed at "Location".

3.4 Select Language



The language for

- Outlook Add-In
- Drop down menus
- Word Marco

are selected here.

The system tray and the Outlook Add-In are only available in German and in English. If you choose another language, the Word macro is registered in the chosen language and the Outlook Add-In and the system tray are installed in English.

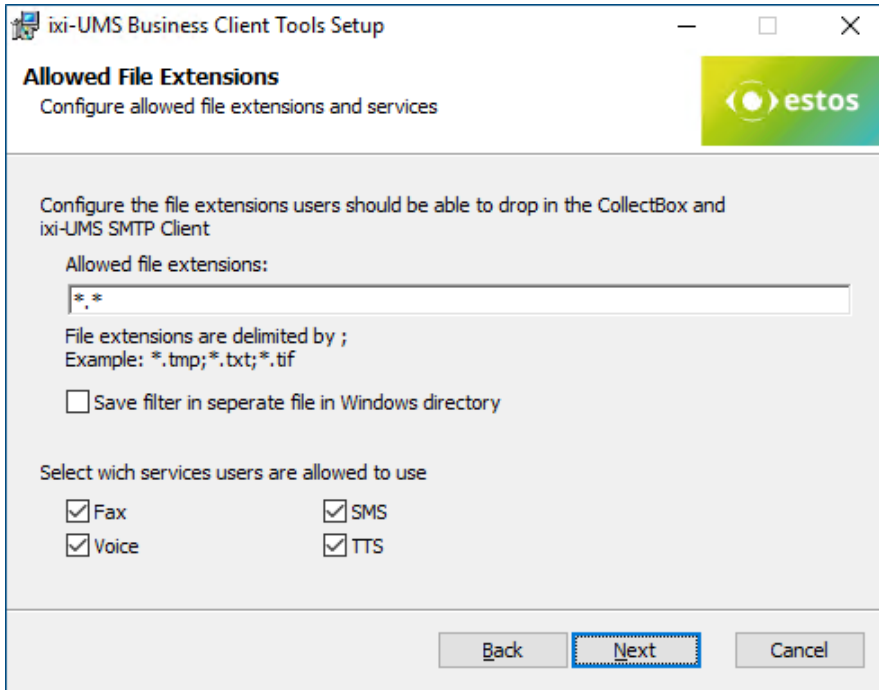
3.5 Allowed File Extensions

Next, a list of the allowed file extensions can be stored in the <ixi-UMS Business Client Tools and the services offered can be selected.

Allowed File Extensions

It is determined therewith which attachments are allowed to be sent via the CollectBox or ixi-UMS SMTP Client

The setting can optionally be stored in the "Prnd.ini" in the user profile at C:\Documents and Settings\



This setting is stored in the respective file in the section UMS. The file extensions are delimited by ; (see screenshot above).

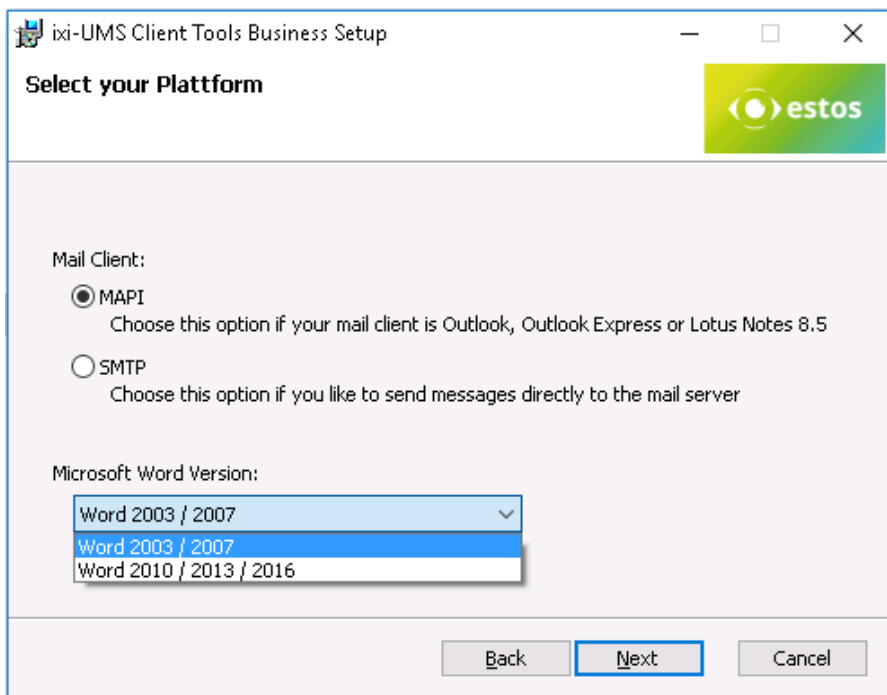
```
[UMS]
AllowedExtensions=*.tmp;*.doc
```

After having changed and stored manually, the Prnd.exe has to be restarted. For this, the Prnd.exe in the task manager has to be stopped and restarted via Start - Programs - ixi-UMS Client Tools.

Select services

Select which services are offered to the user to send the ixi-UMS messages in the collection box and the ixi-UMS SMTP client.

3.6 Select your Plattform



Here you have to choose, whether the mails are passed on to the mail system or the mail client and if so, in which way. Please see "Client Connections"

MAPI

For mail clients that use the "MAPI"-interface

SMTP

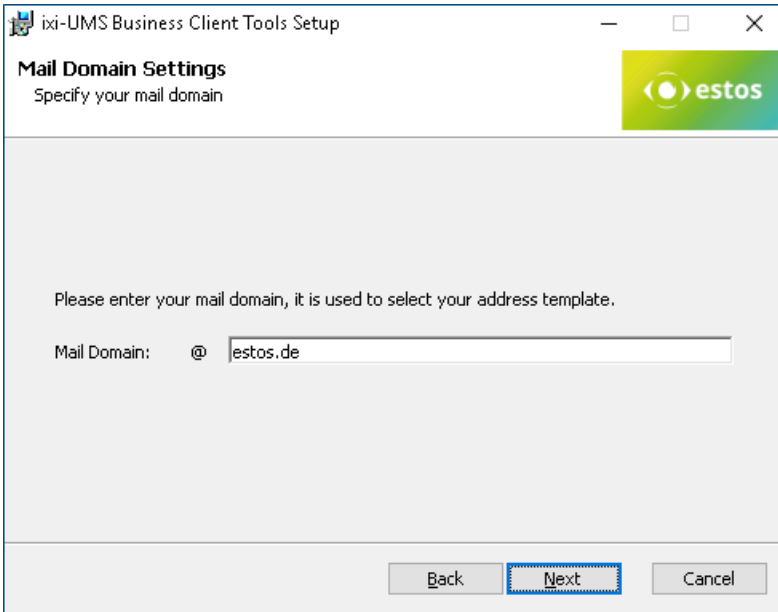
Delivery via ixi-UMS SMTP Client directly to the mail server / ixi-UMS Business Server. In a next step, you have to enter the IP-address of the mail server or the ixi-UMS Business Server as well as the e-mail address of the sender.

3.7 Platform Settings

Here it is determined how the messages created with the ixi-UMS Client Tools shall be addressed.

The addressing is like an E-Mail-Address and can be checked in the settings of the <ixi-UMS Business server (mail system - addressing).

3.7.1 MAPI Settings



ixi-UMS Business Client Tools Setup

Mail Domain Settings
Specify your mail domain

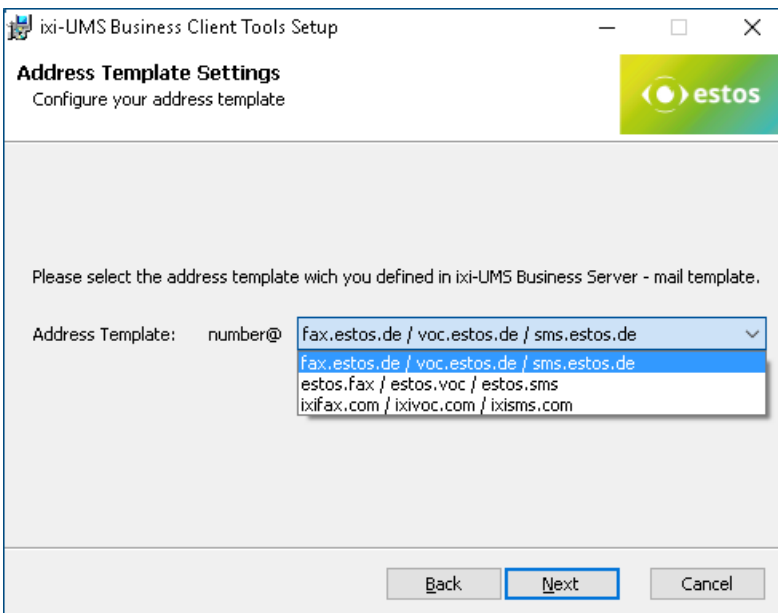
Please enter your mail domain, it is used to select your address template.

Mail Domain: @ estos.de

Back Next Cancel

The mail domain must be specified to create the addressing proposals.

In the next step, you will be offered the possible addresses for selection.



ixi-UMS Business Client Tools Setup

Address Template Settings
Configure your address template

Please select the address template wich you defined in ixi-UMS Business Server - mail template.

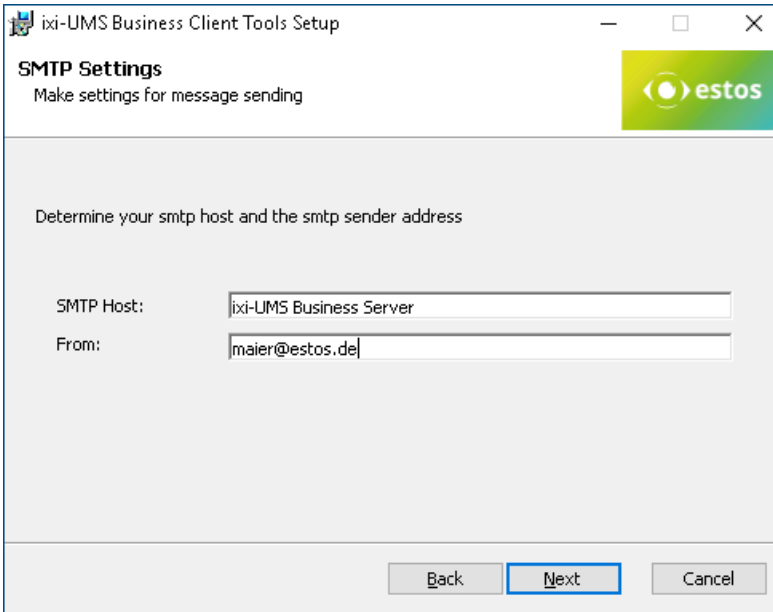
Address Template: number@
fax.estos.de / voc.estos.de / sms.estos.de
estos.fax / estos.voc / estos.sms
ixifax.com / ixivoc.com / ixisms.com

Back Next Cancel

Select how outgoing UMS-messages are to be addressed.

The addressing was set at ixi-UMS Business under "Mail system - addressing".

3.7.2 SMTP Settings

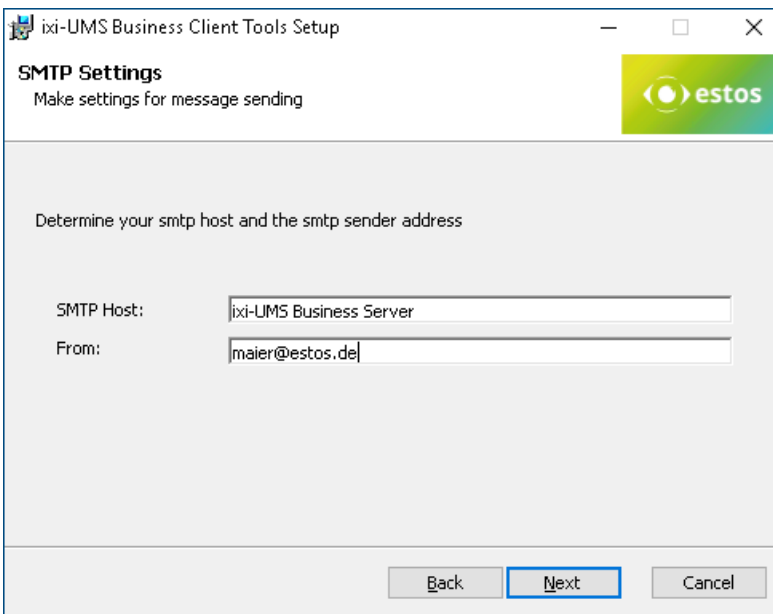


As "**SMTP Host**", the IP-address of the mail server or of the ixi-UMS Business server has to be entered.

As the faxes are not sent via the mail client, the sender e-mail address has to be entered permanently here.

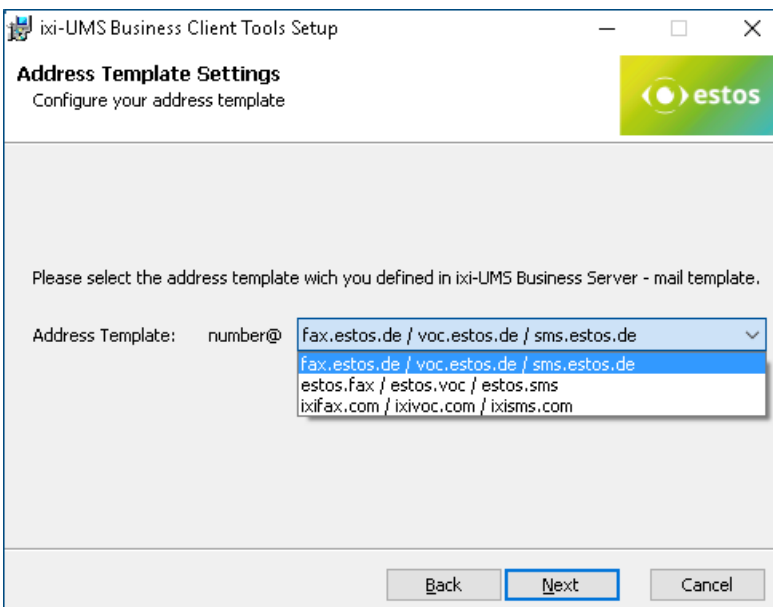
Remark:

At the clients, a link to the "ixi-UMS Client Tools Settings" in the start menu is established. The users can state their e-mail address via that.



The mail domain must be specified to create the addressing proposals.

In the next step, you will be offered the possible addresses for selection.

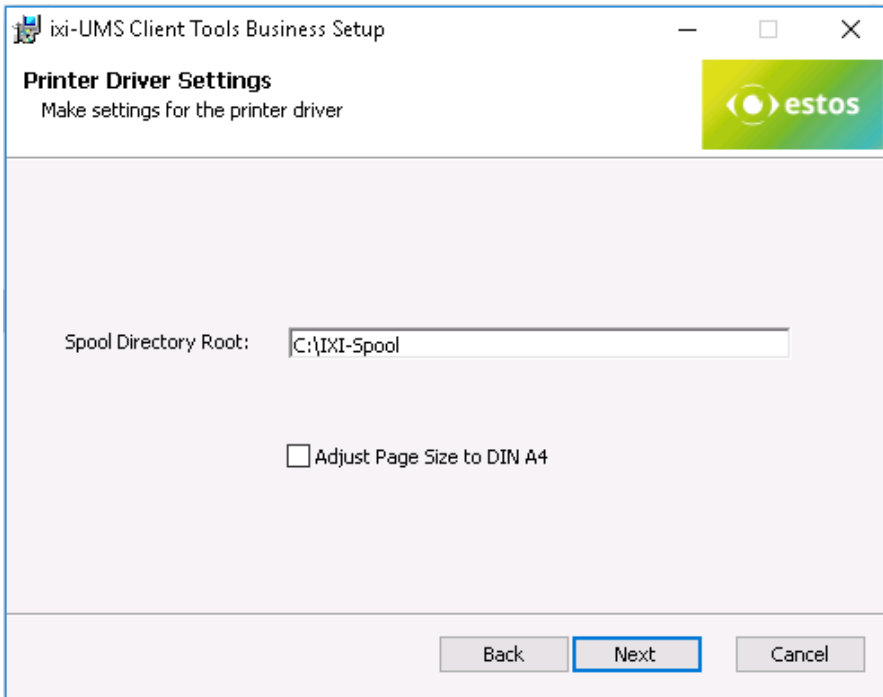


Select how outgoing UMS-messages are to be addressed.

The addressing was set at ixi-UMS Business under "Mail system - addressing".

3.8 Printer Driver Settings

For every user of the ixi-UMS Client Tools, an individual directory is created within the IXI-Spool directory.



The spool directory has to be on a drive / path, on which every has full access.

By default, only the actually labeled part of a document is printed by the printer of the ixi-UMS Client Tools and therewith transferred for delivery. Activate "Adjust Page Size" to create always a TIF in DIN A4-Format.

If you select "Next", the chosen options are installed.

3.9 Installing Word Macros

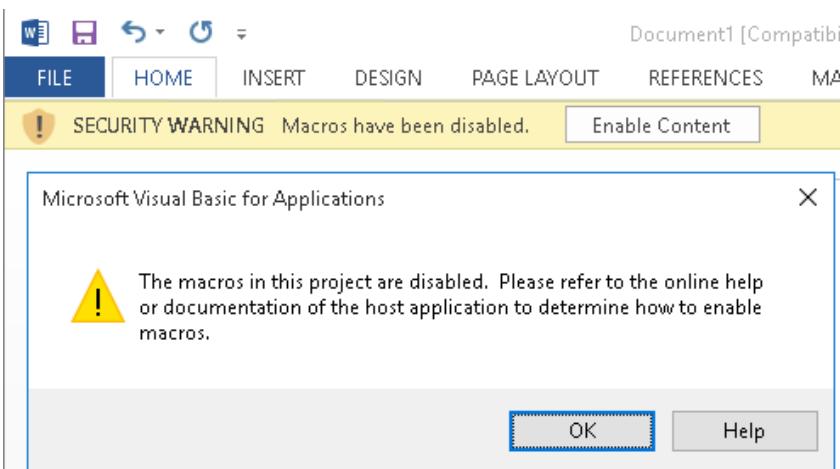
The Word macros can be installed during the setup or afterwards. During the setup, the installation is started automatically.

If the macros shall be installed subsequently, the following files must be called at ...\ixi-UMS Client Tools\MAKRO\<Language>:

- for Word 2000, 2003, 2007 the file WW80.dot
- for Word 2010 and higher the file WW2010.dotm

Remark:

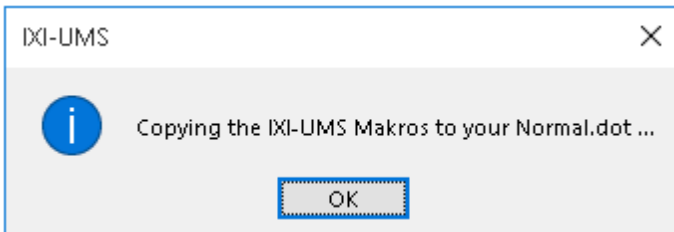
- Macros have to be installed per user
- The Macro Security in Word has to be lowered at least to "Medium"



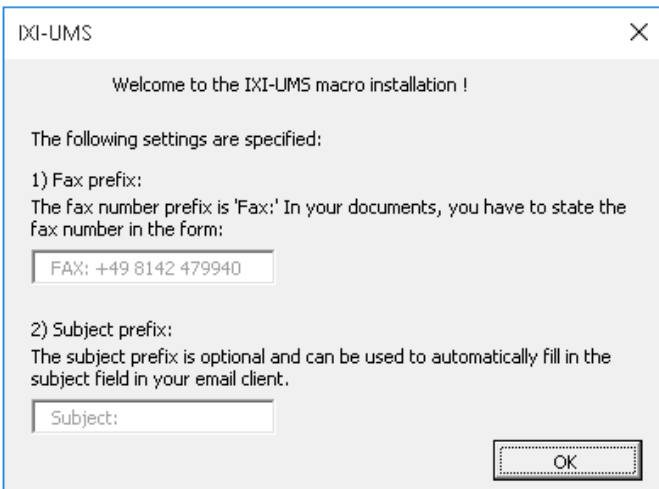
When starting the WW80.dot, Word opens.

If the macro security adjusted is "Medium" or "Low", the following query appears:

The macros have to be enabled.

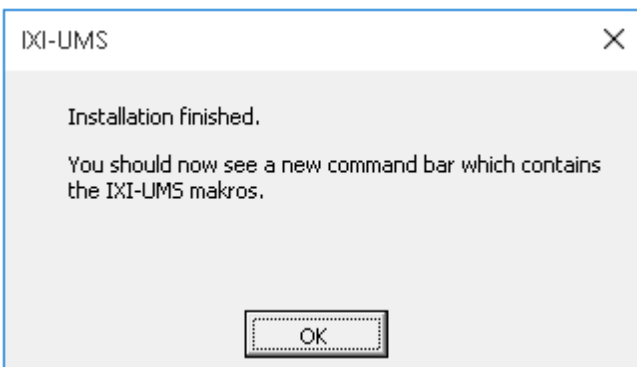


The following window appears:



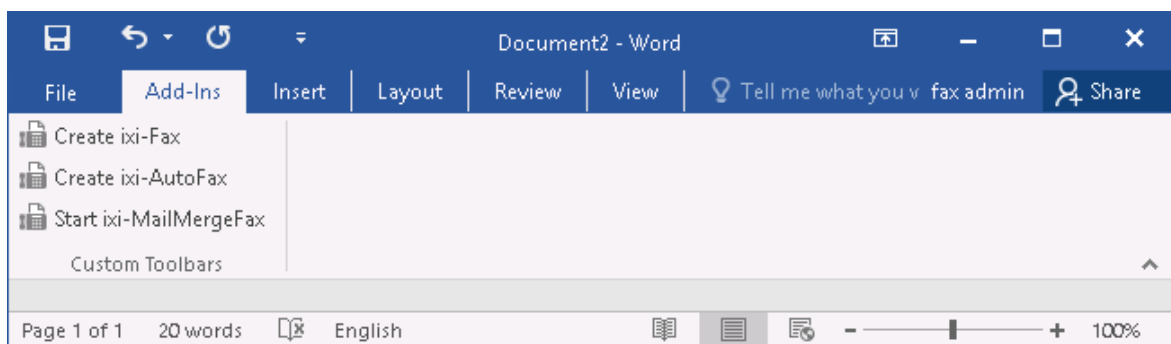
Now the prefixes have to be determined. This information is important for the Auto fax feature and the mail merge fax feature.

Die Prafixe sind fest vorgegeben und können nur über das Makro selber geändert werden.



If successful, the installation of the macros is confirmed.

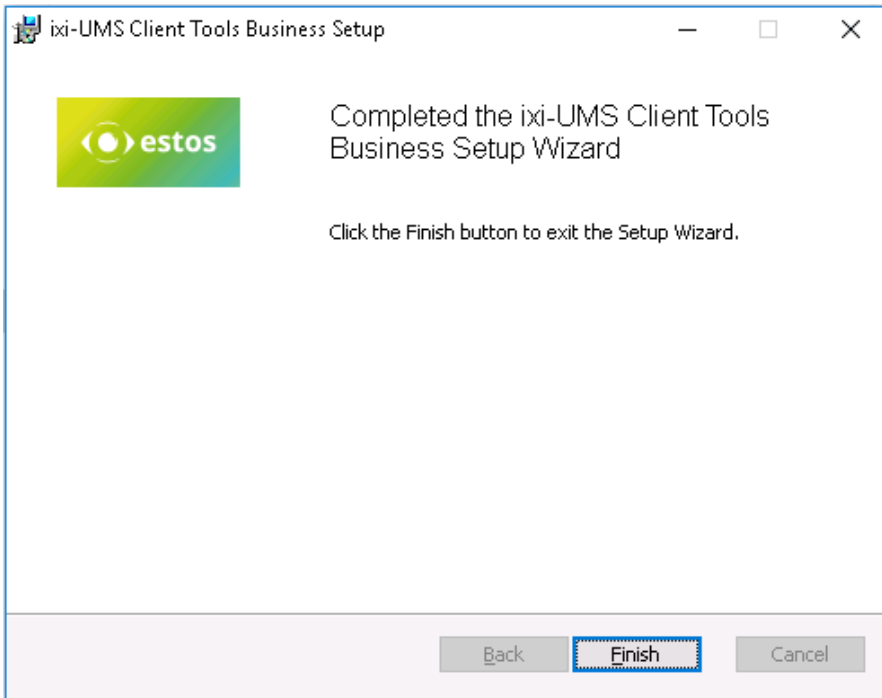
The button ixi-UMS now has to be available in Word FOR THIS USER.



Remark:

If the button is available several times, it can be switched off or the macro can be "uninstalled" completely.

3.10 Finish



At the end of the installation (no matter whether with or without Word macros), a respective message is displayed.

4 Info

4.1 About estos



estos GmbH, headquartered in Olching near Munich, Germany, is a leading manufacturer of software solutions with focus on unified communication with unified messaging, fax, voice mail, SMS and CTI (Computer Telephony Integration) with presence and instant messaging. The products of %Firma% 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 GmbH and its products, please visit estos GmbH website.

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4.2 Version

Software: ixi-UMS Business Client Tools
Version: 6 SR1
Manual: Administrator Manual
Date: 21.09.2017