

ixi-UMS Portal Server

Installation & Configuration

Onlineversion

Content

1	General information	3
1.1	Overview	4
1.1.1	ixi-UMS Web Journal	5
1.1.2	ixi-UMS New Messages	6
1.1.3	ixi-UMS User Settings	7
1.1.4	ixi-UMS Voice-Mailbox	8
1.2	Preconditions	9
1.3	License	9
2	Installation preparation	9
3	Installation	10
3.1	Language	10
3.2	Welcome	10
3.3	License Agreement	11
3.4	Select Destination Location	11
3.5	Ready to Install	12
3.6	Information	12
3.7	Initial Instance	13
3.8	Connection to ixi-UMS	14
3.9	Distributed Installation	15
3.10	LDAP Configuration	16
3.11	User Login	17
3.12	Feature Selection	18
3.13	Finish Configuration	18
3.14	Finish	19
4	ixi-UMS Portal Server Configuration	19
4.1	Global Settings	20
4.1.1	Keys	20
4.1.2	URLs	20
4.1.3	Windows Authentication	21
4.2	Manage Instances	22
4.3	Instance name/Company ID	23
4.3.1	LDAP	23
4.3.1.1	Connection	23
4.3.1.2	Login data	24
4.3.1.3	BaseDN	24
4.3.1.4	User login	25
4.3.1.5	SSO	26
4.3.1.6	Advanced	27
4.3.2	ixi-UMS Server	28
4.3.2.1	ixi-UMS Server	28
4.3.2.2	ixi-UMS Voice-Mail Server	29

4.3.3 ixi-UMS Web Journal	30
4.3.3.1 General.....	30
4.3.3.2 User data.....	31
4.3.4 ixi-UMS New Messages	32
4.3.4.1 General.....	32
4.3.4.2 Features.....	32
4.3.5 ixi-UMS User Settings	33
4.3.5.1 General.....	33
4.3.5.2 Features.....	35
4.3.6 ixi-UMS Voice-Mailbox Configuration	36
4.3.6.1 General.....	36
4.3.6.2 Features.....	37
4.3.6.3 Notification.....	38
4.4 Logging	39
4.5 Information	39
5 Info.....	40
5.1 About estos	40
5.2 Version	40

1 General information

With the ixi-UMS Portal Server, ixi-UMS Enterprise makes the ixi-UMS User Portal Web application available to users.

The settings of the available options of the individual web applications are defined in the respective ixi-UMS components as "Standard" or "Default". In addition, these can be specified individually in the LDAP user administration for the user object. The values entered in the user object overwrite the settings defined in the ixi-UMS components.

If an option is activated for the web application, the user can change or overwrite the defaults entered in the LDAP user administration.

Which information the user sees in the ixi-UMS User Portal and which settings he can make depends on the installed and available ixi-UMS components and the settings on the ixi-UMS Portal Server.

The ixi-UMS Portal Server can be installed on a computer with the ixi-UMS components or on its own computer.

Several instances with different settings can be created in the ixi-UMS Portal Server.

The ixi-UMS Portal Server can be set up so that users are offered the option "Use Windows session authentication". This enables "Single Sign-On" (SSO) for all users, in all instances.

Please note:

If the ixi-UMS components are installed on other computers, some settings (depending on the required and desired websites) must be made manually after the installation and access must be ensured:

1. Access via HTTP/HTTPS to the ixi-UMS computers

Existing firewalls must be set up in such a way that the ixi-UMS Portal Server can access the ixi-UMS computers via HTTP or HTTPS (depending on the setting) on the defined port. All computers must trust the certificates -> the certificates must be entered in the certificate store.

2. Connection security

The "public-key" created by the ixi-UMS Portal Server during installation must be entered in the ixi-Framework installed on all ixi-UMS computers.

3. Customize welcome email (ixi-UMS Voice-Mail Server only)

On the welcome email for the ixi-UMS Voice-Mailbox the link to the ixi-UMS User Portal can be given. The IP address/name of the ixi-UMS Portal Server must be entered in the ixi-UMS Voice-Mail Server.

ProCall Enterprise Integration

The ixi-UMS User Portal can be published via the "WebTabs" of ProCall. The function "Record and listen to announcements by microphone" cannot be used in this case, as the Internet Explorer does not support this function.

In order that users do not have to log on to the ixi-UMS User Portal in this case, the authentication via "ProCall Enterprise Integration" can be done automatically via Single-Sign-On.

1.1 Overview

The scope of the ixi-UMS User Portal available in the ixi-UMS Portal Server depends on the installed ixi-UMS Enterprise components:

available web module	required ixi-UMS component
ixi-UMS Web Journal view incoming messages and confirmations in the ixi-UMS Web Journal	ixi-UMS Kernel
ixi-UMS New Messages Sending fax and SMS messages	ixi-UMS Mail Server Connector ixi-UMS Render Connector ixi-UMS Kernel
ixi-UMS User Settings Information about the fax, SMS, voice permissions, Change sender information and report language Select the cover page, Information about max. pages/fax Information about number of faxes/day	ixi-UMS Mail Server Connector additionally required: ixi-UMS Render Connector ixi-UMS Kernel
ixi-UMS Voice-Mailbox Configuration the browser-based configuration interface for the ixi-UMS Voice-Mailbox	ixi-UMS Voice-Mail Server

The ixi-UMS Portal Server needs a network connection to the required ixi-UMS components. The ixi-UMS User Portal can be provided via HTTP and/or HTTPS. The protocol is configured in the ixi framework. Please refer to the ixi-Framework manual for further information.

Users can open the ixi-UMS User Portal via the following link in their browser:

http://<IP-Adresse des ixi-UMS Servers>:8890/umsportal
respectively
https://<IP-Adresse des ixi-UMS Servers>:443/umsportal

Note: If the ixi-UMS User Portal is opened in the browser of a smartphone, the display is adjusted accordingly.

Users must log on to the ixi-UMS User Portal with the company ID/instance name and the logon data specified in the ixi-UMS Portal Server.

After logging in, the user has access to the defined modules with the options enabled.

1.1.1 ixi-UMS Web Journal

ixi-UMS Enterprise offers with the "ixi-UMS Web Journal" a browser-based overview for the individual user of his own sent and received ixi-UMS Messages from the ixi-UMS Kernel Journal. The ixi-UMS Kernel Journal must be activated. If users are to be able to open the messages, archiving must be activated on the ixi-UMS Kernel.

The prerequisite is that the required user information is available in the LDAP user database. The data is determined on the basis of the stored sender e-mail address and the UMS recipient number and the corresponding entries are displayed.

Your ixi-UMS Components:

ixi-UMS Web Journal Settings Help Logoff

Entries per page Time span Search

Service	Date	Remote station	Subject	
	13:34:51 01.Aug.2019	04569874564	-	<input type="button" value="Details"/> <input type="button" value="Archive"/> <input type="button" value="Delete"/>
	07:10:19 01.Aug.2019	003046549845	Offer to estos ixi-UMS	<input type="button" value="Details"/> <input type="button" value="Archive"/> <input type="button" value="Delete"/>
	08:16:43 09.Jul.2019	017145679879	Please call me at the office	<input type="button" value="Details"/> <input type="button" value="Archive"/> <input type="button" value="Delete"/>
	17:47:16 07.Jul.2019	+31 0578 564896	-	<input type="button" value="Details"/> <input type="button" value="Archive"/> <input type="button" value="Delete"/>
	13:47:32 02.Jul.2019	562	WG: Call from Sales GmbH	<input type="button" value="Details"/> <input type="button" value="Archive"/> <input type="button" value="Delete"/>
	12:51:53 02.Jul.2019	+4917297454	-	<input type="button" value="Details"/> <input type="button" value="Archive"/> <input type="button" value="Delete"/>

6 entries

Details for received fax message ×

Sender:	+31 0578 564896
Recipient:	+49 8142 48384562
Transmission time:	17:47:16 07.Jul.2019
Subject:	-
Remote station ID:	+0 00 00000
Number of pages:	1
Result:	Fax successfully received

The user can display all relevant data for sending and receiving messages in detail.

If the option "Archive all files" is activated on the ixi-UMS Kernel, the user can print or save incoming and outgoing faxes and SMS including the report and listen to messages left behind by callers.

1.1.2 ixi-UMS New Messages

On the "New message" page, the user can send faxes and SMS directly via the browser.

The prerequisite is that the corresponding services are set up on the ixi-UMS Kernel, the ixi-UMS Mail Server Connector is installed and the user has the appropriate permissions.

In the case of an SMS, the text can be entered directly. The pre-searched number of remaining characters and the number of individual messages are displayed.

The screenshot shows the 'Your ixi-UMS Components:' header with navigation links: Web Journal, **New Message**, User Settings, Voice-Mailbox Configuration, Settings, Help, and Logoff. Below are two main sections:

- Send SMS:** Includes instructions on administrator limits and success checks. The 'Recipient number' field contains '+19173593924'. The 'SMS content' field contains 'Please call me back'. Summary statistics at the bottom show: 'Entered characters: 19', 'Estimated number of SMS: 1', and 'Remaining characters until next SMS: 141'. A green arrow icon is at the bottom right.
- Send Fax:** Includes instructions on uploading one PDF file. The 'Recipient number' field contains '+1202 4567041'. The 'Fax content (PDF file)' area has a dashed border and contains an upload icon, the text 'Upload PDF file by drag and drop or select a file', and a green 'select a file' button. Below the button, it says 'File name: Fax.pdf'. A green arrow icon is at the bottom right.

The fax to be sent must be dragged and dropped into the browser as a PDF file or selected on the computer via "Select file". The user can attach multiple PDF files.

For successful sending, the ixi-UMS system must be set up to render PDF files.

1.1.3 ixi-UMS User Settings

On the right side, the user is shown the permissions for the Fax, SMS and Voice functions defined by the administrator in the ixi-UMS system.

If the ixi-UMS Portal Server is enabled, the user can select a cover sheet/cover page stored on the server in the left area, define the language of the ixi-UMS Kernel Report, and specify his or her own fax header.

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 is divided into two columns: "Settings" and "Rights".

Settings Column:

- Coverpage:** "Specify which coverpage (stored by the administrator on the server) shall be used." A dropdown menu shows "System Default: DE_Mit_Absender". A checkbox "Always insert coverpage" is unchecked.
- 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".

Rights Column:

The Following permissions for sending ixi-UMS messages are effective for you:

- Priority:** Allowed send priority: normal
- Sending of fax messages:**
 - Rights: international
 - Maximum number of pages per fax: 60
 - Maximum number of messages per day: Unlimited
- Sending of SMS:**
 - Rights: national
 - Maximum number of messages per day: 5
- Sending of voice messages:** Rights: No sending

Options that have not been released are not displayed.

1.1.4 ixi-UMS Voice-Mailbox

The ixi-UMS Voice-Mailbox Configuration is only available to users with the optional "ixi-UMS Voice-Mail Server".
Via the ixi-UMS Voice-Mailbox, users can conveniently manage their profile settings and announcements via their browser.

The screenshot shows a web browser window with the URL `http://localhost:8890/umsportal/voice-mailbox-configuration/overview`. The page title is "ixi-UMS User Portal". The main navigation bar is green and contains "ixi-UMS Voice-Mailbox configuration" (highlighted), "Settings", "Help", and "Logoff".

Your ixi-UMS Components:

- [Overview](#)
- [Profile Management](#)
- [Notifications](#)
- [Office Hours](#)
- [Change PIN](#)
- [Remote Inquiry](#)

ixi-UMS Voice-Mailbox configuration

Set Profiles

Determine which profiles should be used:

Default profile (active) Work

Edit profile

- ✓ announcement in German available
- ✗ no announcement in English available
- ✓ callers are able to leave messages
- ✗ call forwarding is inactive

Profile used outside office hours: Mobile

Edit profile

- ✓ announcement in German available
- ✓ announcement in English available
- ✗ callers are not able to leave messages
- ✗ call forwarding is inactive

Profile used during breaks: None

Valid for all profiles

Selection of announcement language:

- defined: German
- manual ("Press one for German, press two for English")
- automatic (by means of country code of calling number)

configured at the server:

- 49 423 43 41 German
- Otherwise in German

Information about your voice-mailbox

Your access to the voice-mailbox includes:

- ✓ configuration
- ✓ remote inquiry

Determine the menu language: German

For further information on the functions and settings of the ixi-UMS Voice-Mailbox, please refer to the instructions of the ixi-UMS Voice-Mail Server and the ixi-UMS Voice-Mailbox as well as the User Manual for the ixi-UMS User Portal.

1.2 Preconditions

Hardware Requirements:

- Processor with at least 2000 MHz
- 1 GB free memory

The UTC times of the computers must match, otherwise the JWT token is not valid.

Software Requirements:

- Windows 10/11 (64 bit),
- Windows Server 2016 / 2019 / 2022
- ixi-Framework 8.00 or higher,
- ixi-UMS Enterprise Version 8.00

For distributed installations the ixi-UMS Portal Server requires access to the ixi-UMS components via HTTP/HTTPS.

For the function "Recording announcements via the headset" in the ixi-UMS Voice-Mailbox configuration, the ixi-UMS User Portal must be made available via HTTPS.

Prerequisite at the workplaces

- at least Internet Explorer 11, recording of announcement via headset is not supported
- Microsoft Edge , headset for recording the greeting must be re-selected in each session
- at least Mozilla Firefox 68
- Google Chrome 78

1.3 License

The ixi-UMS Portal Server is included in the scope of ixi-UMS Enterprise and does not have to be licensed separately.

2 Installation preparation

Prerequisite for the installation is the installed ixi-Framework in the given version.

The HTTP and HTTPS protocols are set up in the ixi framework. HTTP is activated by default when ixi-Framework is installed. HTTPS can be activated and set up later at any time. Further information can be found in the ixi-Framework manual under "Additional Information - Set up SSL/HTTPS later".

Note: For the function "Recording announcements via the headset" in the ixi-UMS Voice-Mailbox configuration, the ixi-UMS User Portal must be made available via HTTPS.

The ixi-UMS Portal Server requires access to the ixi-UMS components via HTTP/HTTPS. Because the connection to the ixi-UMS components and the workstations is secured, the "privat.key" created by the ixi-UMS Portal Server must be entered in all ixi-UMS servers.

all installed on one computer

If the ixi-UMS Portal Server is installed on the same server as all (!) required ixi-UMS Enterprise components, all required settings are made through the setup.

distributed installation

If some or all ixi-UMS components are installed on other computers, access via HTTP/HTTPS must be ensured (depending on the required and desired websites).

If necessary, existing firewalls must be set up so that the ixi-UMS Portal Server can access the ixi-UMS computers via HTTP or HTTPS on the defined port.

The "public-key" of the ixi-UMS Portal Server must be entered in the ixi framework on all ixi-UMS servers. Please refer to the Additional Information: Distributed Installations.

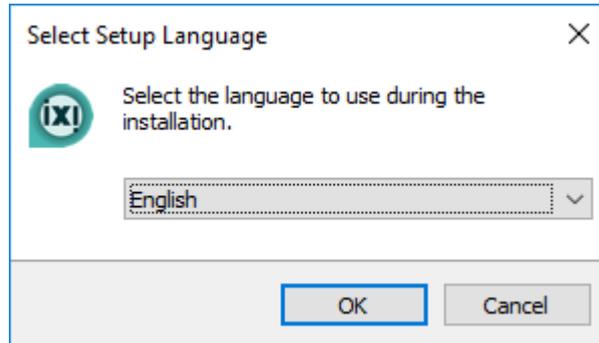
3 Installation

The ixi-UMS Portal Server can be installed on a computer with the ixi-UMS components or on its own computer. If the ixi-UMS components are installed on other computers, some settings (depending on the required and desired websites) must be made manually after installation and access must be ensured.

All settings selected in the setup can be changed later in the ixi-UMS Portal Server configuration.

3.1 Language

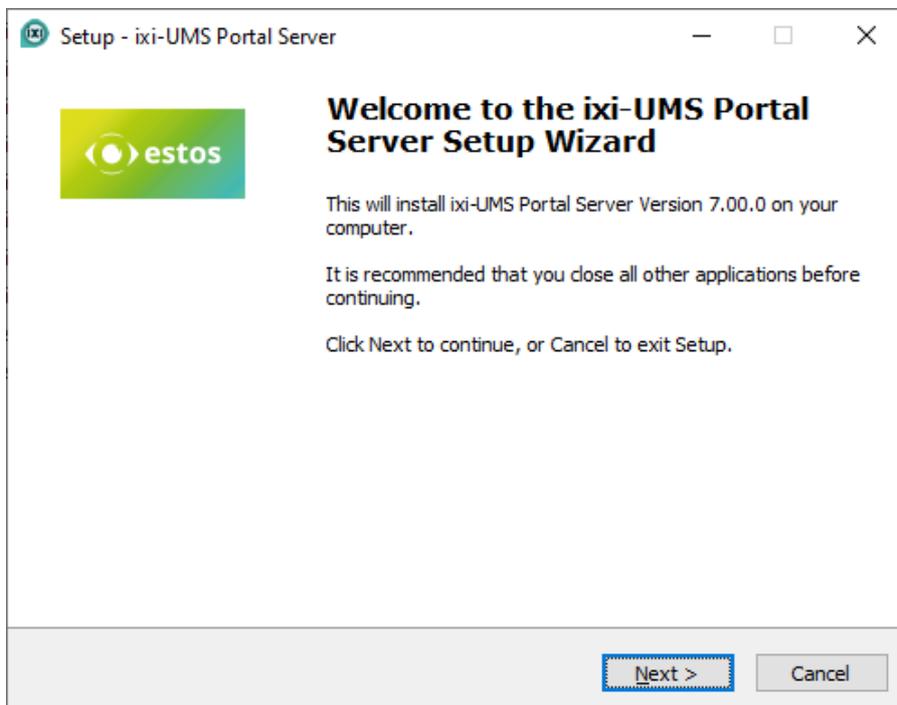
First of all you have to specify the installation language.



The language of the ixi-UMS configuration can be changed later.

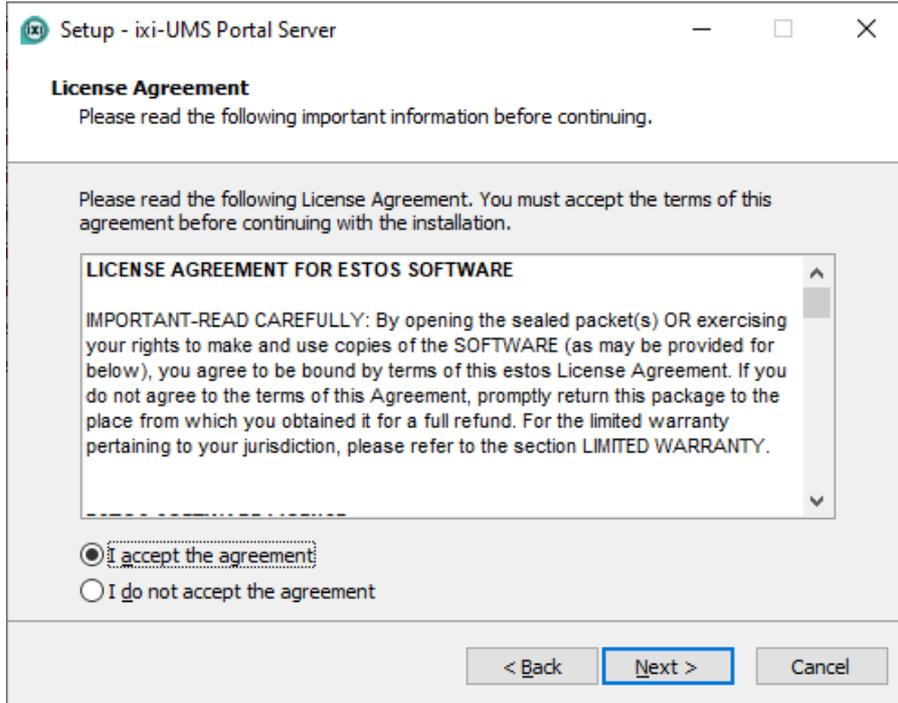
3.2 Welcome

After selecting the language, the installation can be started.



3.3 License Agreement

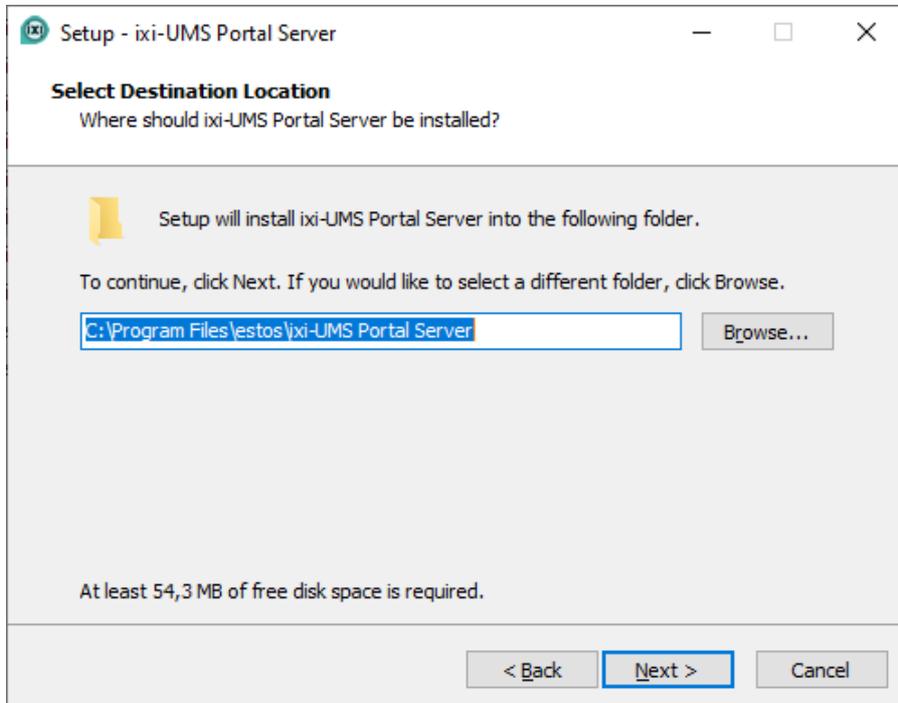
The End User License Agreement is displayed.



Read this carefully and select "I accept...".
Only then can the installation be continued.

3.4 Select Destination Location

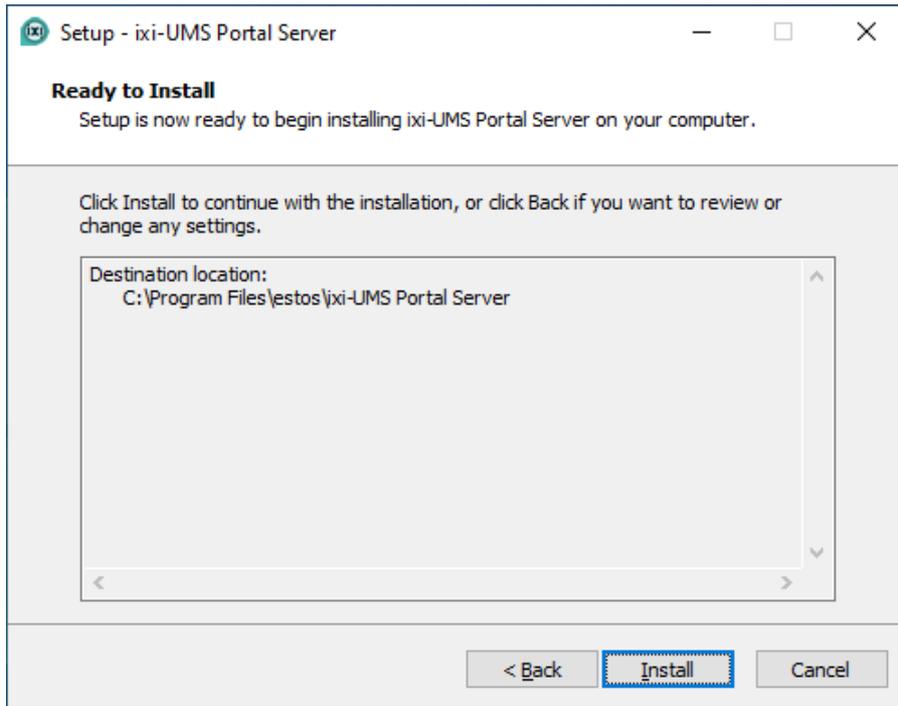
After confirming the license you will be asked for the installation folder.



By default, the folder in which the ixi framework was installed is offered.

3.5 Ready to Install

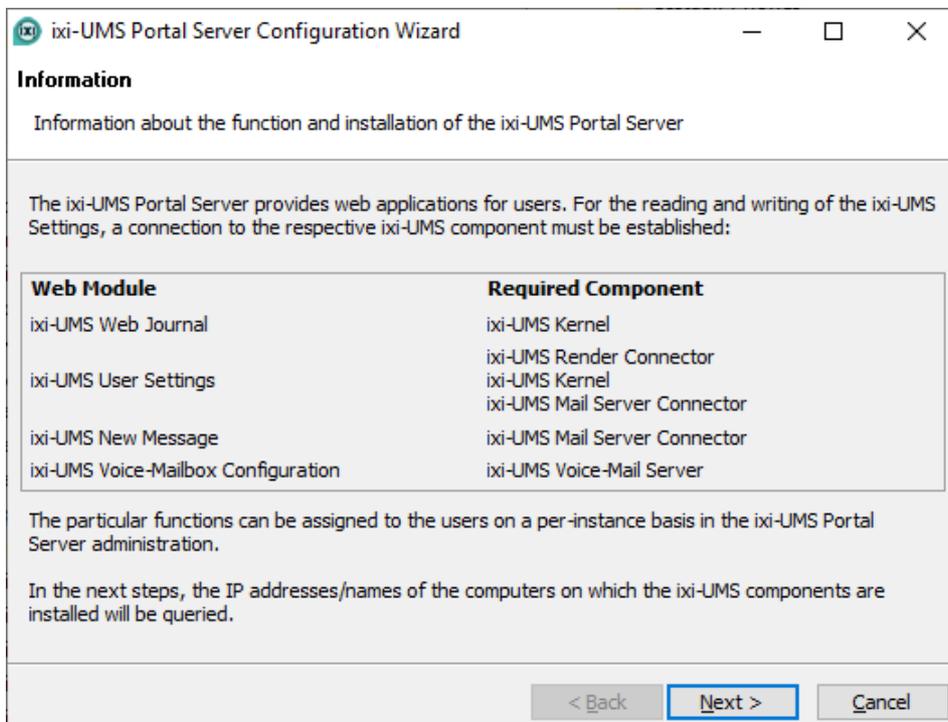
A summary is displayed before copying.



By clicking on the button "Install" the installation is started and all required files are copied.

3.6 Information

A list of the possible web modules and the required ixi-UMS components is displayed for your information.



The required information is then queried using a wizard.

3.7 Initial Instance

Several instances of the ixi-UMS User Portal can be created in the ixi-UMS Voice-Mailbox. Each instance can be configured individually.

Users must specify the instance name (company ID) when logging on to the ixi-UMS User Portal. You should therefore enter a department or company name as the instance name. The name must be 3 - 10 characters long. No blank or special drawings are permitted.

Specify the name for the first instance.

ixi-UMS Portal Server Configuration Wizard

Initial Instance

Set the name for the initial instance/company ID

Multiple instances can be created for administration purposes. It can be specified on a per instance basis which options are available to the user.

Set the name for the initial instance.

Instance Name/Company ID

< Back Next > Cancel

3.8 Connection to ixi-UMS

The ixi-UMS Portal Server can be installed on a computer with the ixi-UMS components or on its own computer. Select whether all ixi-UMS components are installed on one computer or whether the ixi-UMS components are installed on different computers.

If the Apache server is set up on the ixi-UMS servers for HTTPS, encrypted access can be enabled.

ixi-UMS Portal Server Configuration Wizard

Connection to ixi-UMS

Enter the connection data to the ixi-UMS server

Specify whether all ixi-UMS components are installed on one computer or whether the components are installed on several computers. The connection data required by ixi-UMS Portal Server will be queried depending on the selection.

All ixi-UMS Services are on one server

ixi-UMS Server: https

ixi-UMS Mail Server Connector is not installed

Select the instance of the ixi-UMS Mail Server Connector from which the LDAP connection data will be read. The settings can be changed later in the ixi-UMS Portal Server configuration.

Distributed installation

Exchange (selected)
Exchange
MSConnInst1

< Back Next > Cancel

If you have selected "**All ixi-UMS services on one server**", an instance of the ixi-UMS Mail Server Connector must be selected.

This ixi-UMS Mail Server Connector instance is used to provide the ixi-UMS User Settings for the default instance of the ixi-UMS Portal Server.

If an instance is selected, the LDAP connection data is taken from this ixi-UMS Mail Server Connector instance and used for user authentication when logging on to the ixi-UMS User Portal.

If you have selected "**Distributed installation**", the computers will be queried in the next step.

3.9 Distributed Installation

This page is displayed if you have selected "Distributed installations" under "Connection to ixi-UMS".

Enter the IP addresses or names of the computers on which the individual ixi-UMS components are installed.

If the Apache server is set up on the ixi-UMS servers for HTTPS, encrypted access can be enabled.

Hint: When changing to the next entry, the connection is checked.

Component	IP/Host	Port	https	Not installed
ixi-UMS Kernel	192.168.10.10	443	<input checked="" type="checkbox"/>	
ixi-UMS Render Connector	Connectorserver	8890	<input type="checkbox"/>	
ixi-UMS Mail Server Connector	Connectorserver	8890	<input type="checkbox"/>	<input type="checkbox"/>
ixi-UMS Voice-Mail Server	Connectorserver	8890	<input type="checkbox"/>	<input type="checkbox"/>

For each destination, you can specify whether the connection is to be established via HTTP or HTTPS and which port is to be used.

If the ixi-UMS Mail Server Connector and/or the ixi-UMS Voice-Mail Server are not installed, select "not installed" to deactivate this connection.

If an ixi-UMS Mail Server Connector is specified, you must select an instance of the ixi-UMS Mail Server Connector.

This ixi-UMS Mail Server Connector instance is used to provide the ixi-UMS User Settings for the default instance of the ixi-UMS Portal Server.

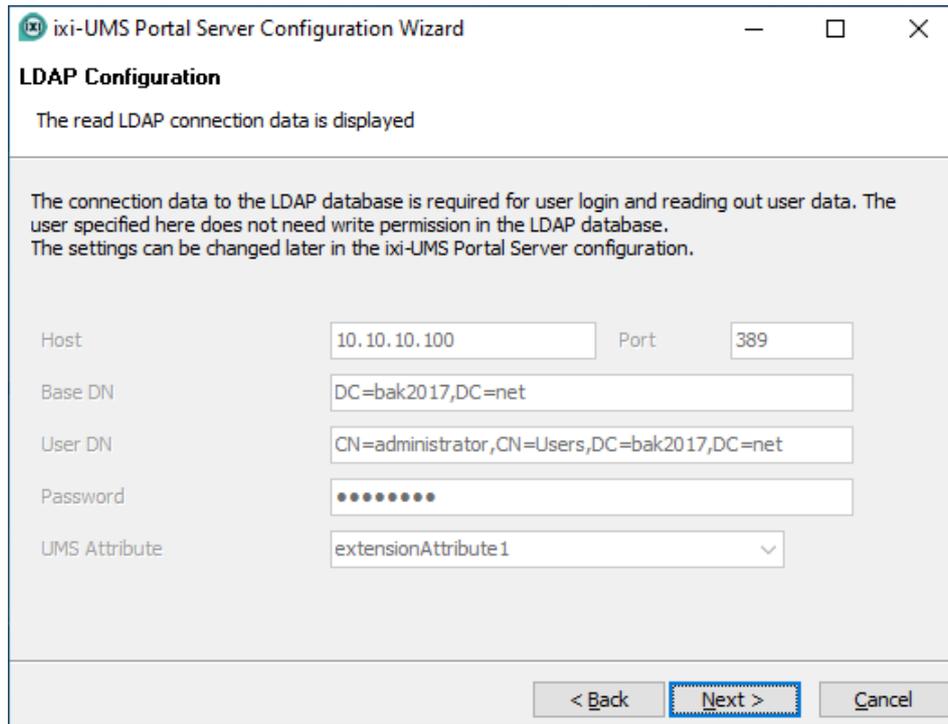
If an instance is selected, the LDAP connection data is taken from this ixi-UMS Mail Server Connector instance and used for user authentication when logging on to the ixi-UMS User Portal.

If no ixi-UMS Mail Server Connector is specified, the LDAP data is read from the ixi-UMS Voice-Mail Server or must be specified manually in the next step.

3.10 LDAP Configuration

If you have previously selected an instance of the ixi-UMS Mail Server Connector, the LDAP connection data entered there will be displayed here.

The LDAP connection data specified here is used for user authentication when logging in at ixi-UMS User Portal.



The screenshot shows a window titled "ixi-UMS Portal Server Configuration Wizard" with a sub-header "LDAP Configuration". Below the sub-header, it states "The read LDAP connection data is displayed". A paragraph explains: "The connection data to the LDAP database is required for user login and reading out user data. The user specified here does not need write permission in the LDAP database. The settings can be changed later in the ixi-UMS Portal Server configuration." The form contains the following fields:

Host	10.10.10.100	Port	389
Base DN	DC=bak2017,DC=net		
User DN	CN=admin, CN=Users, DC=bak2017, DC=net		
Password	••••••••		
UMS Attribute	extensionAttribute1		

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

If no ixi-UMS Mail Server Connector instance has been selected, the LDAP data is read from the ixi-UMS Voice-Mail Server or must be specified here.

You can change this setting later in the ixi-UMS Portal Server configuration.

3.11 User Login

Users must log on to the ixi-UMS User Portal. Specify how users should log on to this instance. If the default e-mail address is not to be used, you can specify any field from the LDAP database. LDAP databases are used by default to authenticate the user login:

LDAP database	attributes
Microsoft Activ Directory	sAMAccountName
Lotus Domino	CN
ixi-UMS User Management	UID

ixi-UMS Portal Server Configuration Wizard

User Login

Enter the attribute for the user login

The user must log on to the ixi-UMS web application.
Specify the LDAP attribute that contains the "Login Name":

Login name

E-mail address (attribute "mail")

Attribute for the user login

sAMAccountName

Specify whether users should be able to log in with their LDAP password or their PIN (only in conjunction with ixi-UMS Voice-Mail Server)

Login using

LDAP Passwords

Voicemail PIN (requires connection to the ixi-UMS Voice-Mail Se

< Back Next > Cancel

The standard LDAP password or the PIN for the ixi-UMS Voice-Mailbox (if the ixi-UMS Voice-Mail Server is installed) can be used as the password for user logons.

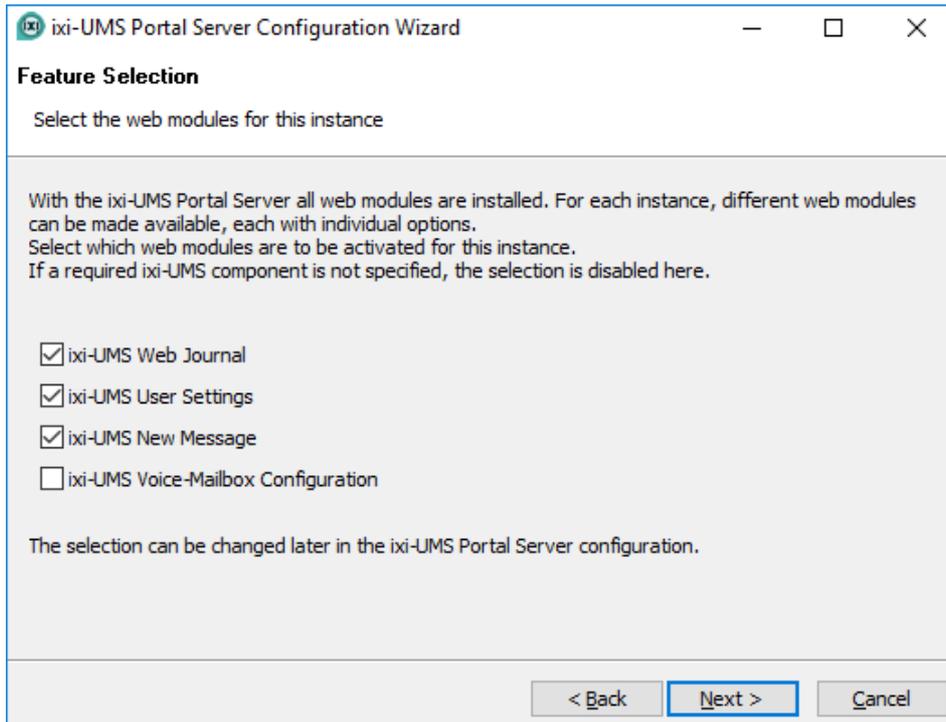
Important:

To enable users to log on to an Domino Server with the password, the "Internet password" of the respective user must be set. Alternatively, the login method must be changed to "PIN".

You can change these settings later in the ixi-UMS Portal Server configuration.

3.12 Feature Selection

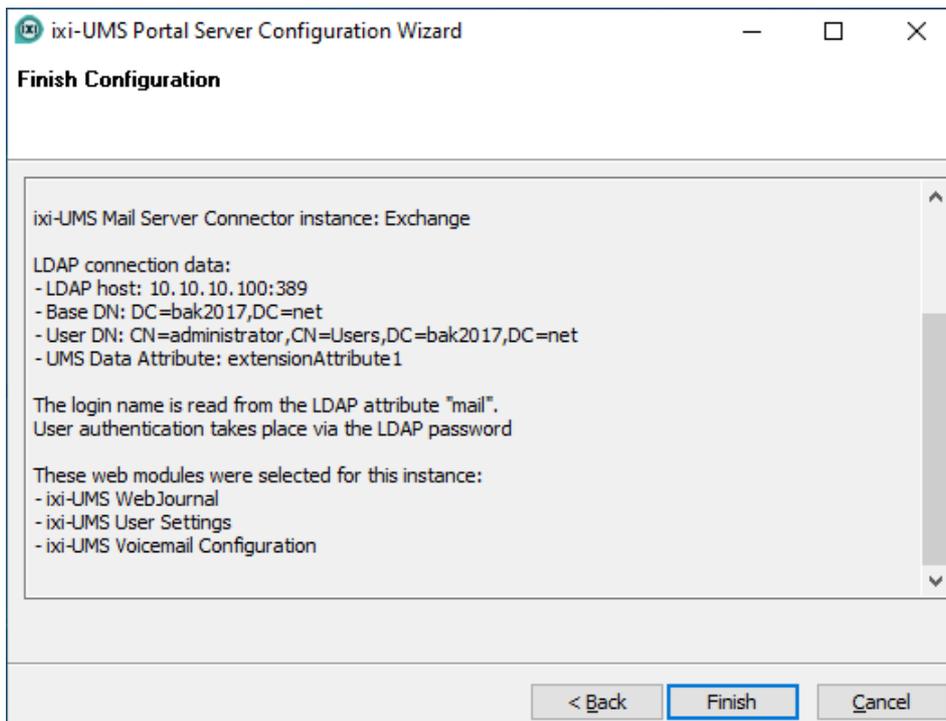
Select which modules of the Web application are to be activated in this instance of the ixi-UMS Portal Server.



You can change this setting later in the ixi-UMS Portal Server Configuration and define for each web application which options should be available.

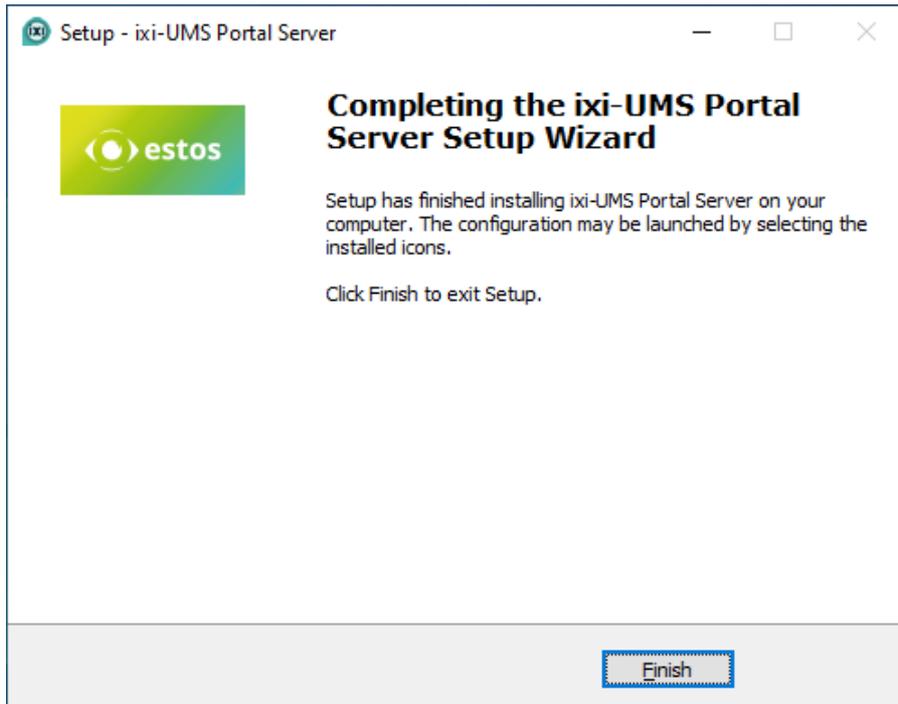
3.13 Finish Configuration

Finally, a summary of the selected settings is displayed.



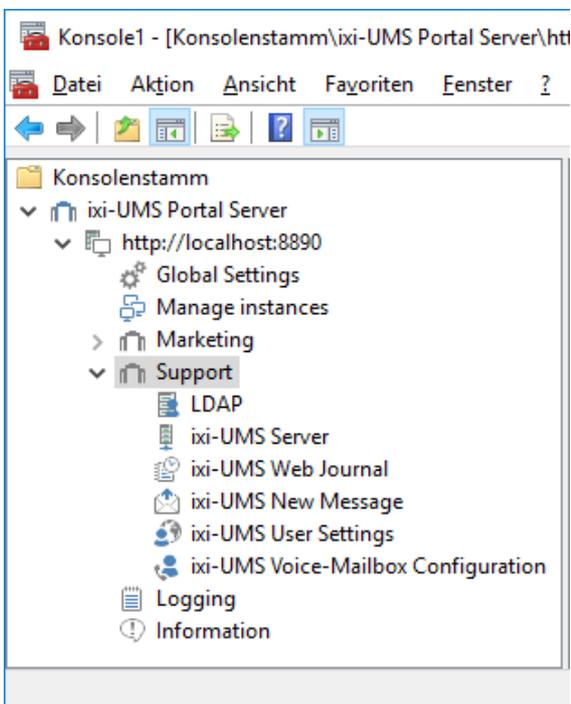
3.14 Finish

Once all components have been installed and set up, the setup can be finished by clicking "Finish".



4 ixi-UMS Portal Server Configuration

After installation, the ixi-UMS Portal Server can be configured via a snap-in in Microsoft Management Console (MMC).



Several instances can be created, each with its own "Company ID" (instance name) required for the login.

The ixi-UMS Portal Server configuration consists of global and instance-dependent settings.

For additional information on how to use the ixi-UMS Snp-Ins, see under Additional Informations:

Switching the language of the SnapIn

Registering SnapIn on Other Computers

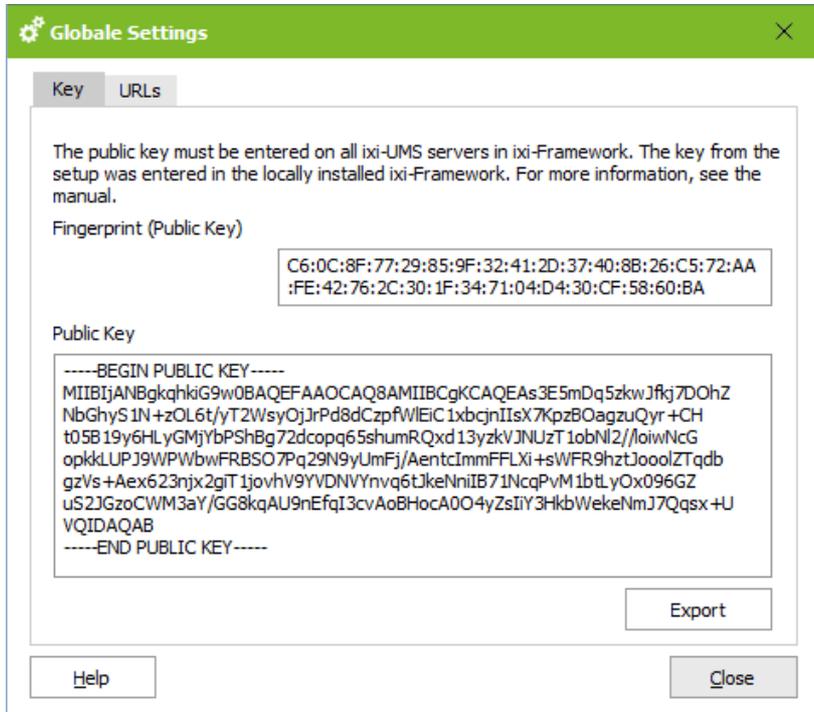
Administrating other ixi-UMS components of the same version installed in the network.

4.1 Global Settings

Basic server settings are made here and general information is displayed. These specifications are valid for all instances.

4.1.1 Keys

To secure the connection from the ixi-UMS Portal Server to the ixi-UMS components and to the workstations, the JWT tokens issued to the users after authentication are digitally signed.



For this purpose, the "public-key" must be entered in the ixi-Framework on all computers on which the required ixi-UMS components are installed.

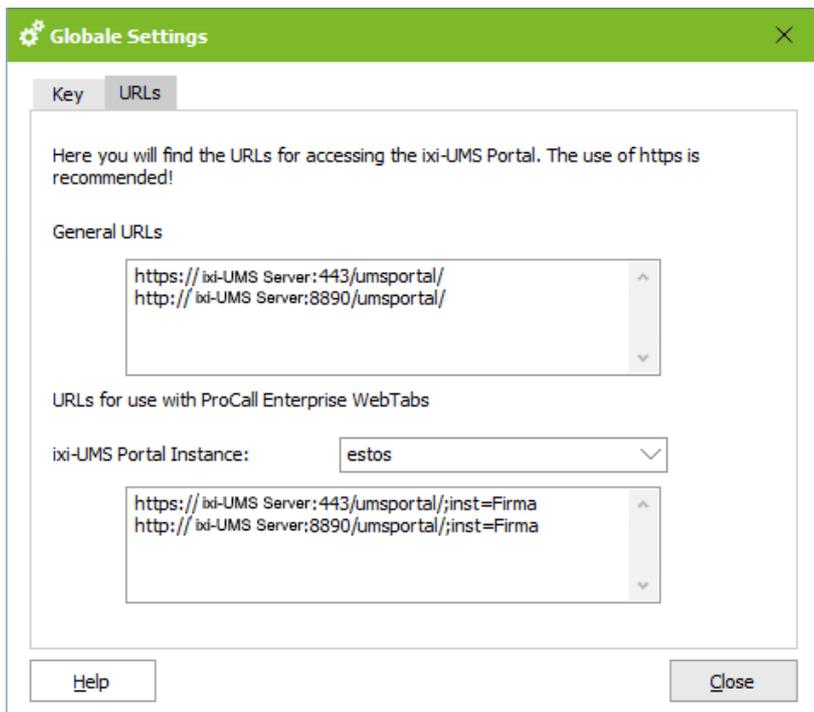
The "public-key" is automatically entered into the locally installed ixi framework.

If ixi-UMS components are installed on other computers, you can copy or export the key here, copy it to the other computers and read it into the ixi-Framework there. Alternatively you can download the key via http/https in the ixi-Framework.

For further information please refer to the "Additional Information - Distributed Installations".

4.1.2 URLs

The ixi-UMS User Portal can be opened via the links listed here. Note the prerequisites at the work centers.



General URLs

Tell the users this link, as well as the Instance ID/Company ID and the required credentials.

Integration into the estos ProCall WebTabs

In the URL to open the ixi-UMS User Portal the "InstanceID" can be transferred.

If the ixi-UMS User Portal is called using the link, the instance specification is preset.

Select the required instance to display the valid URL.

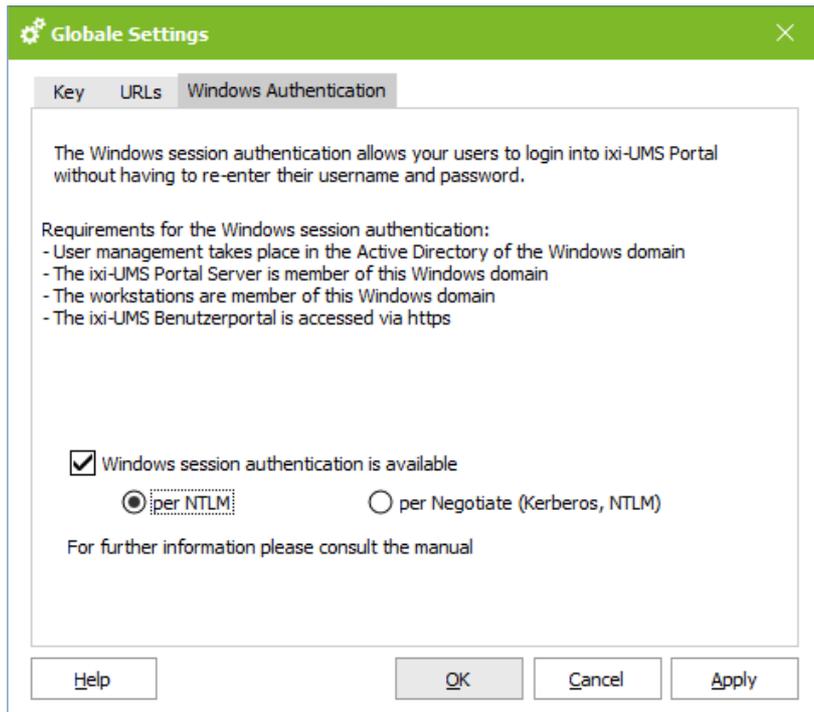
4.1.3 Windows Authentication

The ixi-UMS Portal Server can be set up to allow users to log in to the ixi-UMS User Portal using single sign-on. If this option is enabled, the "Use Windows session authentication" option is displayed on the login pages **for all instances**.

The following requirements are necessary for users to use this option:

- o the user administration is done in an Active Directory
- o the computer on which the ixi-UMS Portal Server is installed must be a member of this Windows domain
- o the workstations must be members of the Windows domain
- o the users must be logged on to the Windows domain
- o the ixi-UMS User Portal is made available to the users via HTTPS.
- o

For instances where these requirements are not met, the "Use Windows Session Authentication" option is displayed, but cannot be used successfully.



via NTLM (recommended)

Logon via SSO is performed using the NTLM method.

via Negotiate

The browser used and the domain controller negotiate whether the logon is performed using the NTLM or Kerberos procedure.

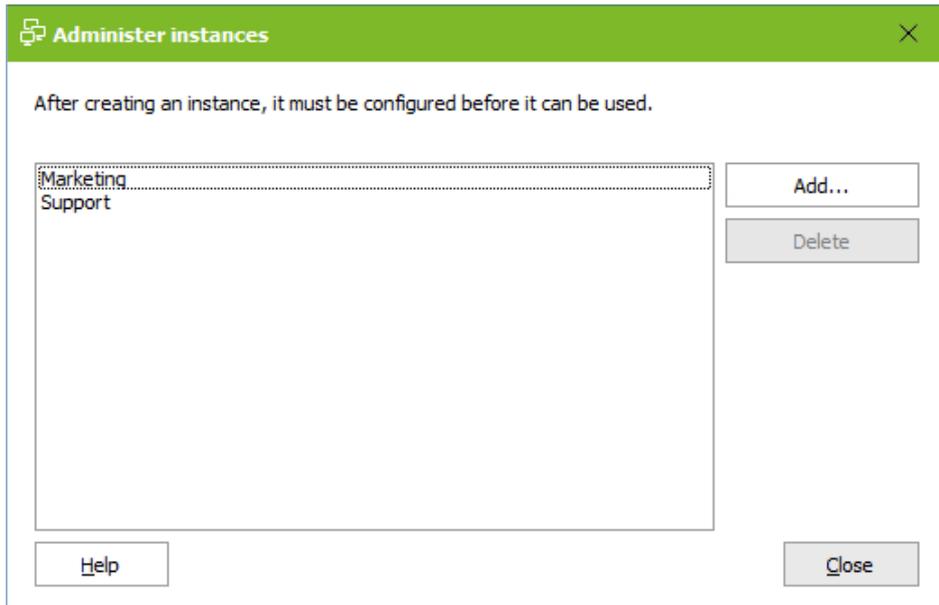
If this setting is used, see the notes in the chapter SSO with Kerberos procedure in the additional information.

Notice:

For the use of SSO, please note the required facilities at the workstations shown in the Additional Information.

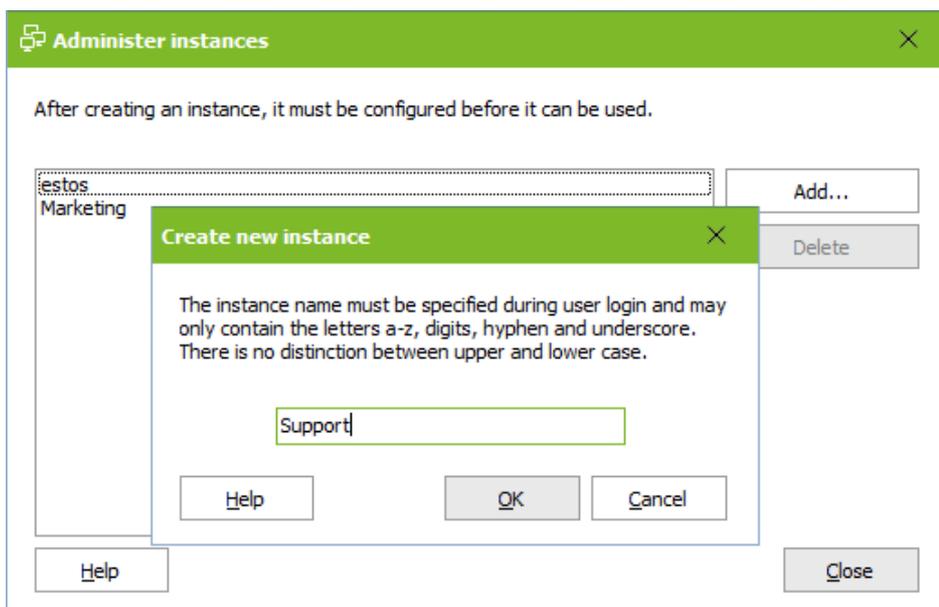
4.2 Manage Instances

Several instances can be created, each with its own "Company ID" (Instance name) required for the login.



The global settings are valid for all instances. The settings for LDAP, user logon and web applications can be made individually in the configurations in the menu under the instance name.

To create a new instance, click on "Add" and assign a name. Note that this name is part of the login for the user.



4.3 Instance name/Company ID

The following configurations are available for each instance created.

4.3.1 LDAP

During the installation of the ixi-UMS Portal Server, the LDAP connection data can be transferred for the first instance from the ixi-UMS Mail Server Connector or ixi-UMS Voice-Mail Server that may be installed. This data must be entered for all other instances.

4.3.1.1 Connection

The LDAP connection data entered here is required exclusively for the authentication of ixi-UMS User Portal users.

The specified servers must match the specifications at ixi-UMS Mail Server Connector and ixi-UMS Voice-Mail Server. The OUs to be defined under "Base DN" for the user search must also be accessible via the specifications on ixi-UMS Mail Server Connector and ixi-UMS Voice-Mail Server.

The read and write access for displaying and changing the ixi-UMS user properties is performed by the corresponding ixi-UMS component (e.g. ixi-UMS Mail Server Connector or ixi-UMS Voice-Mail Server).

LDAP configuration dialog box showing connection details for the main LDAP server and optional alternative servers. The main server is LDAP-Server with port 389. Alternative servers include LDAP-Server2 and LDAP-Server3, both with port 389. A checkbox for 'Use TLS/LDAPS for all servers (see manual)' is present and unchecked. Buttons for Help, OK, Cancel, and AcceptApply are at the bottom.

Specify at least one LDAP server and associated port.

Optional: Connections to alternative LDAP servers

If the first LDAP server cannot be reached, the query is started for the next one.

The query is executed on the next server until either it is no longer reachable or the "Apache Service" is restarted.

All servers must be domain controller / LDAP database servers **of the same domain** at the same level.

If the communication with the LDAP server is to be encrypted, please ensure that the servers specified match the certificate. Please also read the article "Certificates" in the additional information.

4.3.1.2 Login data

The user specified here requires read access to the OUs specified under "Base DN" or the entire domain.

The screenshot shows the 'LDAP' configuration window with the 'Login data' tab selected. The window title is 'LDAP'. The tabs are 'Connection', 'Login data', 'Base DN', 'User Login', 'SSO', and 'Advanced'. The main area contains the text: 'Enter the user data to login to the LDAP server. This account must have read access to all specified OUs.' Below this, there are two input fields: 'User DN' with the value 'cn=admin,ou=serviceAccount,dc=domain,dc=net' and 'Password' with a masked value '*****'. A 'Test' button is located to the right of the password field. At the bottom of the window, there are four buttons: 'Help', 'OK', 'Cancel', and 'AcceptApply'.

This account searches for the login data of the user in order to be able to perform the login at ixi-UMS User Portal.

Changes of the settings in the ixi-UMS User Portal by the user, are carried out by the respective ixi-UMS Module. The account entered in this module for LDAP access requires write permission !

4.3.1.3 BaseDN

Select whether the users of the ixi-UMS User Portals should be searched in the **entire domain** or in individual OUs.

The screenshot shows the 'LDAP' configuration window with the 'Base DN' tab selected. The window title is 'LDAP'. The tabs are 'Connection', 'Login data', 'Base DN', 'User Login', 'SSO', and 'Advanced'. The main area contains the text: 'Enter the BaseDNs to be searched.' Below this, there are two radio buttons: 'Full domain' (unselected) and 'Individual OUs' (selected). Under 'Full domain', there is an input field for 'LDAP domain' with the value 'dc=domain,dc=net'. Under 'Individual OUs', there is a list box containing two entries: 'OU=Marketing,dc=domain,dc=net' and 'ou=Benutzer,dc=domain,dc=net'. Below the list box are 'Add' and 'Delete' buttons. At the bottom, there is a dropdown menu for 'Attribute for UMS settings' with the value 'extensionAttribute1'. At the bottom of the window, there are four buttons: 'Help', 'OK', 'Cancel', and 'AcceptApply'.

If you want to limit your search to **individual OUs**, click on "Add" and enter the complete DN.

Any number of DNs can be specified.

The specified OUs must also be accessible via the entries in ixi-UMS Mail Server Connector and ixi-UMS Voice-Mail Server.

Further restrictions and filters for the login can be set up under Advanced.

4.3.1.4 User login

The users must log on to the ixi-UMS User Portal with the "Company ID/Instance name" and individual user login data. Specify with which specifications the users of this instance are to log on to the ixi-UMS User Portal. The following settings can be useful:

Loginname:

Email Address

Windows user name (sAMAccountName), only for Activ Directory Integration

Fax number (facsimileTelephoneNumber)

The screenshot shows a dialog box titled "LDAP" with a green header bar. It has several tabs: "Connection", "Login Data", "Base DN", "User Login" (which is selected), "SSO", and "Advanced". The "User Login" tab contains the following text and controls:

- Text: "Users must log on to the ixi-UMS web application. Enter the LDAP attribute that contains the "Login Name":"
- Section: "Login name"
 - Radio button (selected): "E-mail address (Attribute "mail")"
 - Radio button: "Attribute for user login"
 - Text input field containing "sAMAccountName"
- Text: "Determine whether the user should log on with his LDAP password or his PIN (only in connection with ixi-UMS Voice-Mail Server)."
- Section: "Login via"
 - Radio button (selected): "LDAP password"
 - Radio button: "Voicemail PIN (requires connection to the ixi-UMS Voice-Mail Server)"

At the bottom of the dialog box are four buttons: "Help", "OK", "Cancel", and "Apply".

Registration by means of:

LDAP password (useful for Activ Directory Integration)

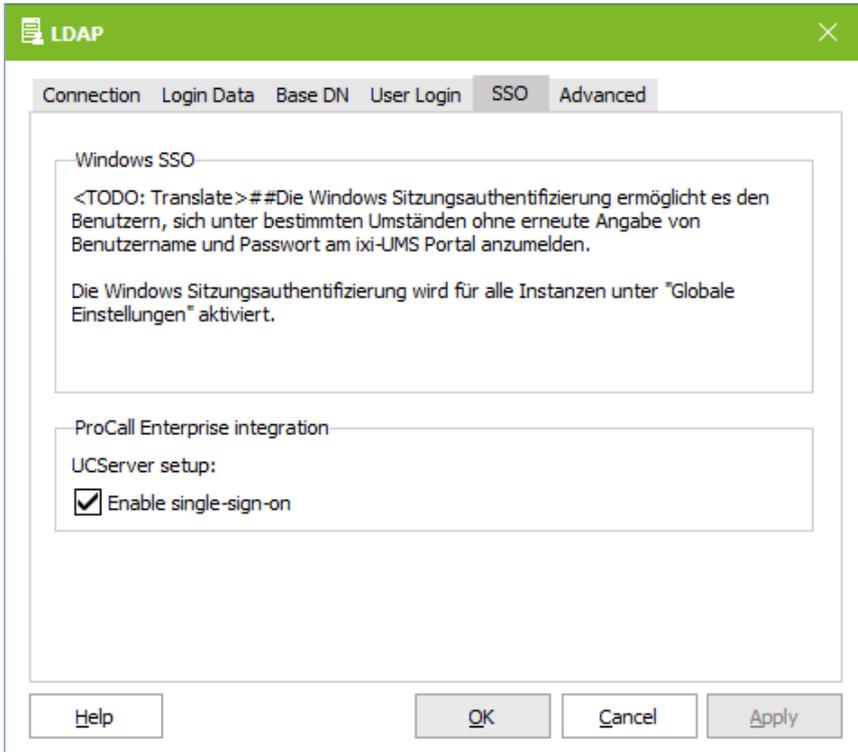
Voice mail PIN (only in conjunction with ixi-UMS Voice-Mail Server), mandatory when using public folders

Important:

To enable users to log on to an IBM Domino Server with the password, the "Internet password" of the respective user must be set. Alternatively, the login method must be changed to "PIN".

4.3.1.5 SSO

The ixi-UMS Portal Server can be set up so that users can log in to the ixi-UMS User Portal using single sign-on. If this option is activated in the "Global settings", the option "Use Windows session authentication" is displayed on the login pages for all instances.



ProCall Enterprise Integration:

If the ixi-UMS User Portal is published via the "WebTabs" of ProCall, the single sign-on login can be performed by the estos ProCall Enterprise Server.

For this function, the estos ProCall Enterprise Server must be entered in the ixi-Framework in the "UC Integration" menu.

See Additional Information: Including ixi-UMS User Portal in estos ProCall.

4.3.1.6 Advanced

By default, the entire LDAP directory is searched for the login data specified under User login. Here you can specify whether other filters should be applied for user login.

Restriction by attribute content

An attribute and the required content can be specified.

LDAP

Connection Login Data Base DN User Login SSO **Advanced**

Optionally restrict this instance either to members of a specific Active Directory group or specify an LDAP attribute and content (eg. phone or fax number range) the user's entry must match.

No restriction / all members of the selected OUs

Restriction via attribute content

Attribute Value

Only members of this AD group

Examples

Attribute: facsimileTelephoneNumber
Value: +49*

Result:

Only users who have entered a fax number that starts with 49 in user management can log in.

Attributes: department
Value: Managing director

Result:

Only users who have entered the word "business manager" in the "department" field of the user administration can log in.

Group Selection

Please choose the group

Group Name	DN of the Group
Exchange Install Domain Servers	CN=Exchange Install Domain Servers,CN.
Exchange Servers	CN=Exchange Servers,OU=Microsoft Exc
Exchange Trusted Subsystem	CN=Exchange Trusted Subsystem,OU=M.
Exchange Windows Permissions	CN=Exchange Windows Permissions,OU=.
ExchangeLegacyInterop	CN=ExchangeLegacyInterop,OU=Micros.
Faxuser	CN=Faxuser,CN=Users,DC=bak2017,DC=.
Gäste	CN=Gäste,CN=BuiltIn,DC=bak2017,DC=.
Help Desk	CN=Help Desk,OU=Microsoft Exchange S.
Hygiene Management	CN=Hygiene Management,OU=Microsoft.
Hyper-V-Administratoren	CN=Hyper-V-Administratoren,CN=BuiltIn,.
IIS_IUSRS	CN=IIS_IUSRS,CN=BuiltIn,DC=bak2017,.
Klonbare Domänencontroller	CN=Klonbare Domänencontroller,CN=Us..
Konten-Operatoren	CN=Konten-Operatoren,CN=BuiltIn,DC=.
Kryptografie-Operatoren	CN=Kryptografie-Operatoren,CN=BuiltIn,
Leistungsprotokollbenutzer	CN=Leistungsprotokollbenutzer,CN=Builti.
Leistungsüberwachungsbenutzer	CN=Leistungsüberwachungsbenutzer,CN.
Managed Availability Servers	CN=Managed Availability Servers,OU=Mi.
Netzwerkkonfigurations-Operat	CN=Netzwerkkonfigurations-Operatoren

AD group members only

If Active Directory is used for user management, the instance can be set up for members of a group.

After clicking on "Select group" all groups of the Active Directory are displayed.

ONE group can be selected.

Result:

Only users who are also members of this group can log in to this instance.

4.3.2 ixi-UMS Server

Enter the IP addresses or names of the <%PRODUCTNAME%> computers on which the individual ixi-UMS components are installed. If a component is not required, no connection data need to be specified.

If the Apache server is set up on the ixi-UMS servers for HTTPS, encrypted access can be enabled.

4.3.2.1 ixi-UMS Server

The connection to the ixi-UMS servers queried here is required for the use of the ixi-UMS Web Journal and the ixi-UMS User Settings.

The screenshot shows a dialog box titled "ixi-UMS Server" with a green header. It has two tabs: "ixi-UMS Server" (selected) and "ixi-UMS Voice-Mail Server". The main area contains the following text: "Enter the IP addresses/names of the computers on which the ixi-UMS components are installed. For ixi-UMS components that are not required or cannot be reached, the IP address/name can be left blank. Features from ixi-UMS components that are not specified here or marked as 'not installed' are not available or are restricted." Below this text are three rows of configuration fields:

ixi-UMS Kernel	<input type="text" value="localhost"/>	<input type="text" value="8890"/>	<input type="checkbox"/> https	✓
ixi-UMS Render Connector	<input type="text" value="ConnServ.domain.net"/>	<input type="text" value="8890"/>	<input type="checkbox"/> https	✗
ixi-UMS Mail Server Connector	<input type="text" value="ConnServ.domain.net"/>	<input type="text" value="8890"/>	<input type="checkbox"/> https	⚠

Below the fields is a "Connection test" button. Underneath, it says "Select the instance of ixi-UMS Mail Server Connector that reads the system defaults." followed by a dropdown menu with "Austria" selected and "MSConnInst1" as an alternative option. At the bottom are buttons for "Help", "OK", "Cancel", and "AcceptApply".

For each destination you can specify which port should be used (standard 8890) and whether the connection should be established via HTTPS.

After entering the IP address / name, the connection must be tested.

The result is displayed to the right of the entries.

If the connection to a ixi-UMS Mail Server Connector is specified, you must select an instance of the ixi-UMS Mail Server Connector.

From this ixi-UMS Mail Server Connector instance, the default settings and authorizations of the users for the services Fax, SMS and Voice are read and displayed in this instance of ixi-UMS Portal Server to the users in ixi-UMS User Portal.

4.3.2.2 ixi-UMS Voice-Mail Server

The screenshot shows a dialog box titled "ixi-UMS Server" with a sub-tab "ixi-UMS Voice-Mail Server". The main area contains the following text: "Enter the IP addresses/names of the computers on which the ixi-UMS Voice-Mail Server is installed. If the ixi-UMS Voice-Mail Server is not required or not installed, the entry can be omitted. Then the ixi-UMS Voice-Mailbox Configuration feature is not available." Below this text, there is a label "ixi-UMS Voice-Mail Server" followed by a text input field containing "ixi-UMS-VMS", a port number input field containing "443", a checked checkbox for "https" with a warning icon, and a "Connection test" button. At the bottom of the dialog, there are four buttons: "Help", "OK", "Cancel", and "Accept/Apply".

The connection to the ixi-UMS Voice-Mail Server must be entered here if the ixi-UMS Voice-Mailbox configuration is to be available in the ixi-UMS User Portal.

For each destination you can specify which port should be used (standard 8890) and whether the connection should be established via HTTPS.

After entering the IP address / name, the connection must be tested.

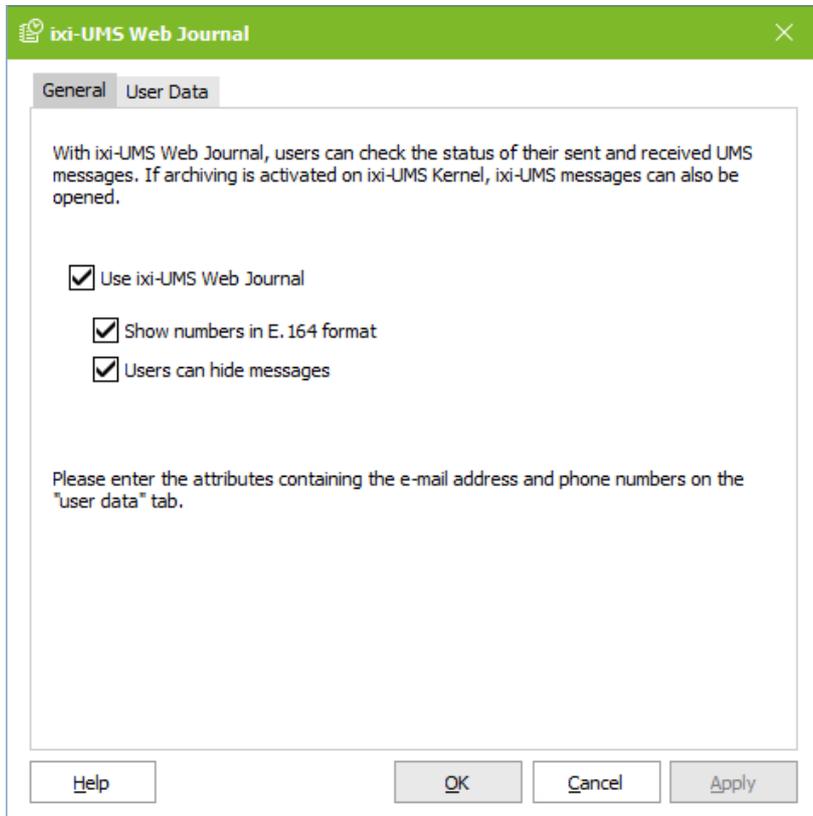
The result is displayed to the right of the entries.

4.3.3 ixi-UMS Web Journal

Define if users are allowed to use the ixi-UMS Web Journal and which attributes contain the required values.

4.3.3.1 General

If the ixi-UMS users should be able to access the ixi-UMS Web Journal via the ixi-UMS User Portal, the display of the Web Module must be activated here.



Show all phone numbers in E.164 format

The phone numbers of incoming and outgoing messages are displayed by default as they were transmitted. Optionally, all phone numbers can be displayed in international format.

Users can hide messages

If the user is allowed to hide journal entries in ixi-UMS Web Journal, he/she can switch between shown and hidden entries there by means of a button.

To enable users to open or save incoming and outgoing faxes and SMS including the report and to listen to messages left by callers, **the option "Archive all files" must be activated on ixi-UMS Kernel.**

Otherwise, only the reports for incoming and outgoing messages will be displayed

4.3.3.2 User data

The users are only shown their own entries in the ixi-UMS Web Journal. The UMS numbers assigned to them and the e-mail address are determined by LDAP query.

ixi-UMS Web Journal

General User data

Enter the LDAP attributes containing the user data.

E-mail address: mail

Attribute 1 for UMS number

E-mail address type IXI :

Other LDAP attribute: facsimileTelephoneNumber

Attribute 2 for UMS number

E-mail address type IXI :

Other LDAP attribute: telephoneNumber

Attribute 3 for UMS number

E-mail address type IXI :

Other LDAP attribute: otherfacsimileTelephoneNumber

Attribute 4 for UMS number

E-mail address type IXI :

Other LDAP attribute: otherTelephoneNumber

Help OK Cancel AcceptApply

Specify the attributes in which the fax recipient number(s) is entered and the attribute in which the default sender email address is stored.

Please note:

If older entries are to be displayed as well, the journal backup must be set up accordingly at ixi-UMS Kernel.

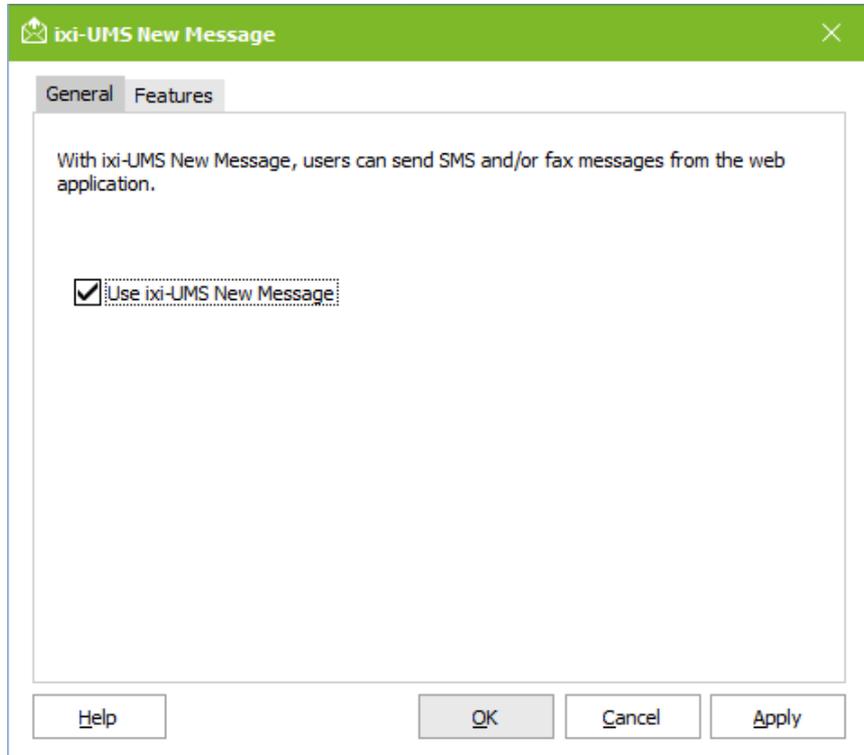
4.3.4 ixi-UMS New Messages

Enable the function if the users are allowed to send SMS and/or FAX messages from the browser.

The function requires the ixi-UMS Mail Server Connector to be set up. Make sure that the instance of the ixi-UMS Mail Server Connector selected in the ixi-UMS Portal Server can resolve the user's email sender address for outgoing messages.

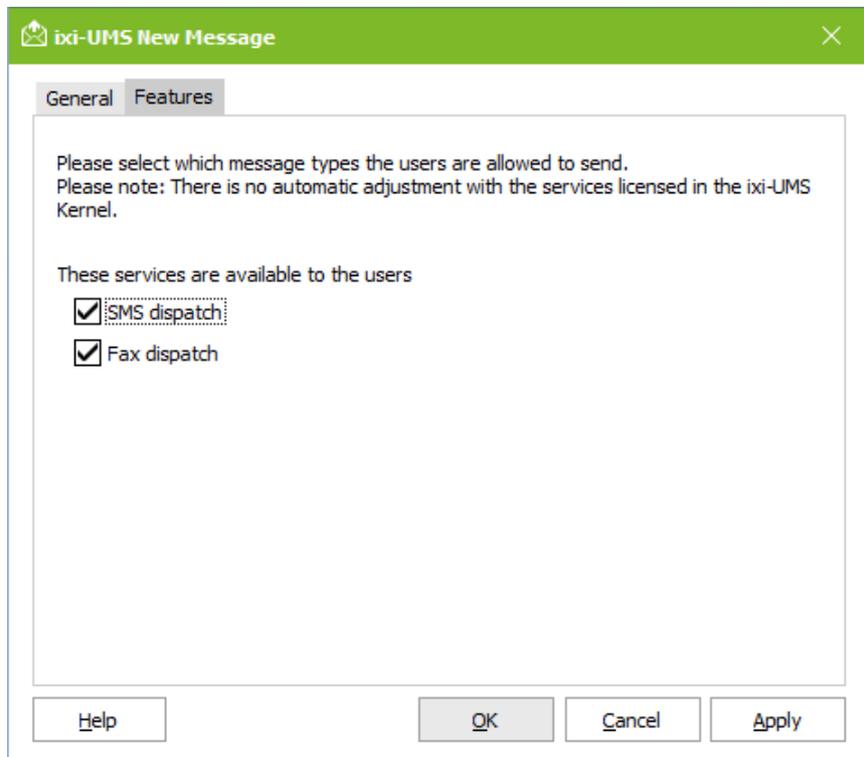
4.3.4.1 General

If the ixi-UMS users should be able to send messages via the ixi-UMS New Message web page, the display of the web module must be activated here.



4.3.4.2 Features

Specify whether the user is allowed to send fax messages and/or SMS.

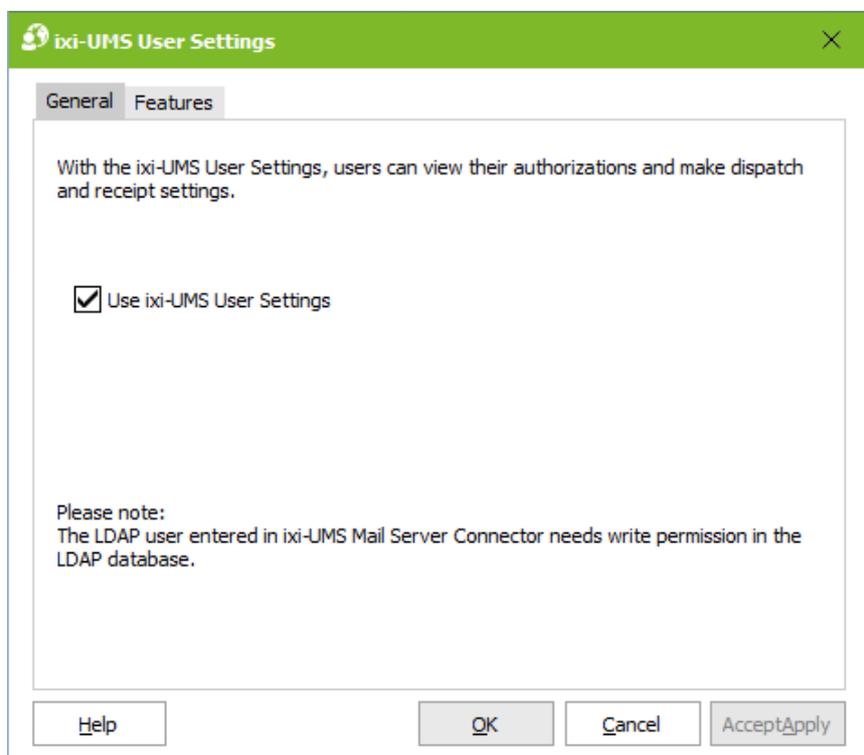


4.3.5 ixi-UMS User Settings

Specify which information the user can see and which settings the user can change.

4.3.5.1 General

If the ixi-UMS users are to be able to access the ixi-UMS User Settings via the ixi-UMS User Portal, the display of the web module must be activated here.



Please note:

The reading and writing of user data is performed by the ixi-UMS Mail Server Connector via the LDAP settings specified in the ixi-UMS Mail Server Connector.

The user specified there for LDAP access requires write permission if the users are to be allowed to change settings.

4.3.5.2 Features

Specify what information the user can see and what option the user can change.

Users are allowed to

Select coverage

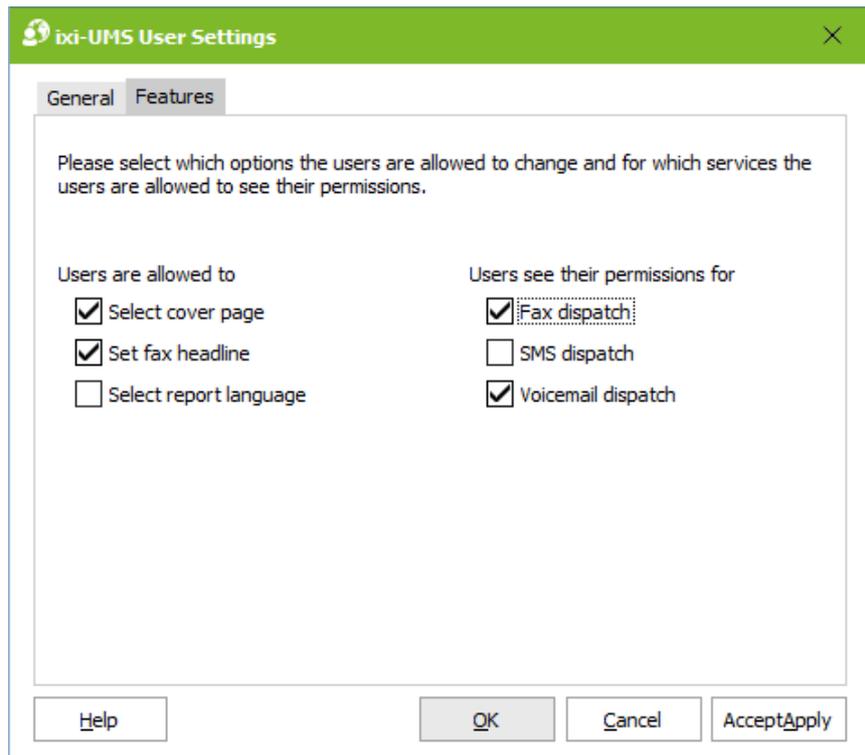
All coverage folder stored on the ixi-UMS server are displayed to the user for selection.

Please refer to the ixi-UMS Kernel Manual under ixi-UMS Render Connector - Coverpages for detailed information on setting up and creating a cover page.

Set fax headline

The Fax-Headline = Sender ID is stored at the ixi-UMS Kernel and is valid for all outgoing fax messages.

If the option for the web application is activated, the user can specify or overwrite the fax headline in the LDAP user administration.



Select Report Language

If the reports for incoming messages and responses are sent to the mail server in HTML format, the language of these messages can be specified.

This function must be activated in the ixi-UMS Kernel and ixi-UMS Mail Server Connector and the languages must be activated.

Note: In the web application, all languages are always displayed, regardless of whether they are activated in the ixi-UMS system or not.

Users see their permissions for

Define the services for which the user can see the authorizations defined globally or for the user object.

4.3.6 ixi-UMS Voice-Mailbox Configuration

The ixi-UMS Voice-Mailbox Configuration can only be used in conjunction with the ixi-UMS Voice-Mail Server !

Via the ixi-UMS Voice-Mailbox Configuration, users can conveniently manage their profile settings and announcements via their browser.

Important:

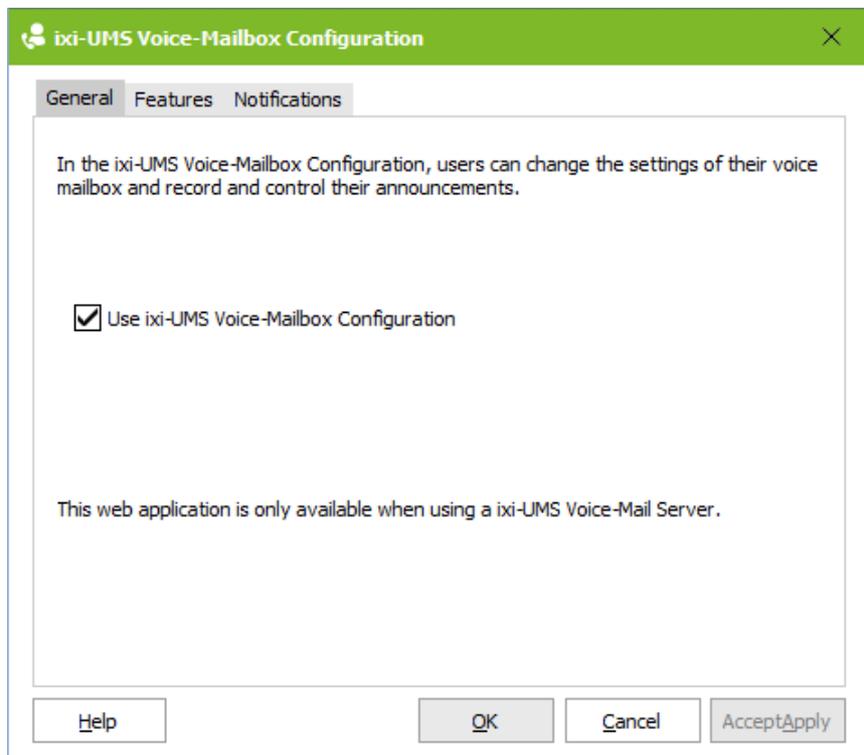
In order to record announcements via the browser-based ixi-UMS Voice-Mailbox configuration, either

- the telephone numbers of the office telephones must be entered in the LDAP database under "telephoneNumber" or
- the users can enter their telephone number themselves and/or
- a headset/microphone must be available at the workplace and ixi-UMS User Portal provided via HTTPS.
-

If no phone number can be read out or no headset is available in the browser, the "record buttons" remain grayed out even when used.

4.3.6.1 General

If the ixi-UMS users are to be able to access the ixi-UMS Voice-Mailbox configuration via the ixi-UMS User Portal, the display of the web module must be activated here.



Please note:

The reading and writing of user data is performed by the ixi-UMS Voice-Mail Server using the LDAP settings specified in the ixi-UMS Voice-Mail Server.

The user specified there for LDAP access requires write permission if the users are to be allowed to change settings.

The ixi-UMS Voice-Mail Server supports only one LDAP connection. All ixi-UMS User Portal users must be entered in the LDAP database given in the ixi-UMS Voice-Mail Server.

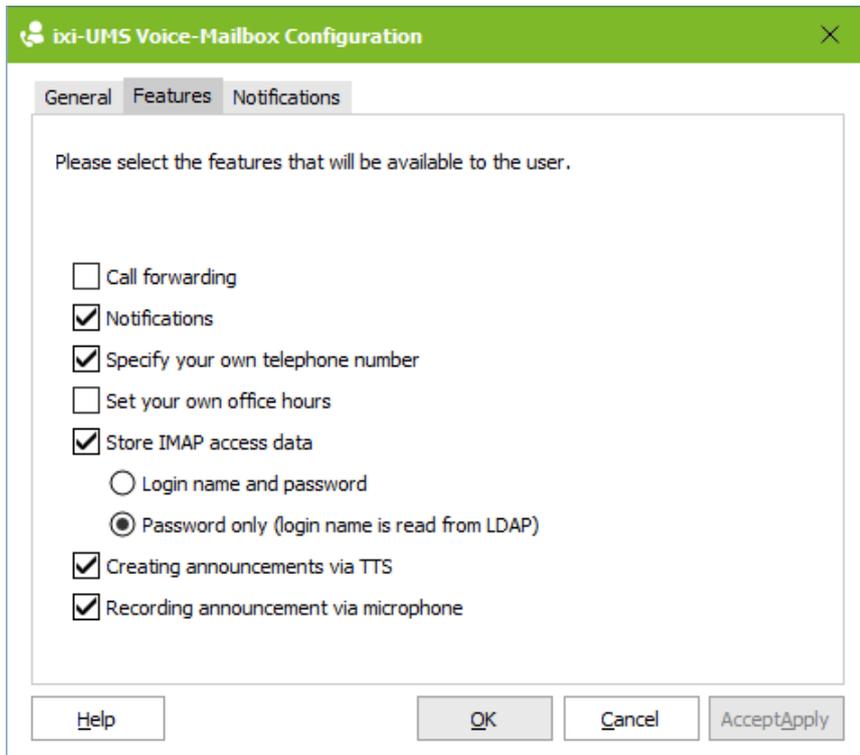
4.3.6.2 Features

Here you can specify which settings the users are allowed to make and change themselves in the ixi-UMS Voice-Mailbox Configuration.

Users can always manage their announcements and profiles. The option to configure call forwarding or notification can be hidden on the ixi-UMS Voice-Mailbox Configuration.

Please note that the connection to the PBX must support this feature. If this is not the case, the corresponding hooks should be removed here. Please refer to the ixi-UMS Voice-Mail Server Manual for further information on the requirements.

If call forwarding is activated, the user can optionally offer a caller to be forwarded to another telephone number or to leave a message.



The screenshot shows a dialog box titled "ixi-UMS Voice-Mailbox Configuration" with a green header bar. It has three tabs: "General", "Features", and "Notifications". The "Features" tab is selected. The main area contains the text "Please select the features that will be available to the user." followed by a list of features with checkboxes and radio buttons:

- Call forwarding
- Notifications
- Specify your own telephone number
- Set your own office hours
- Store IMAP access data
 - Login name and password
 - Password only (login name is read from LDAP)
- Creating announcements via TTS
- Recording announcement via microphone

At the bottom, there are four buttons: "Help", "OK", "Cancel", and "AcceptApply".

If the user is allowed to set the **Notifications**, the users can change the settings themselves via the ixi-UMS Voice-Mailbox Configuration. Overwrite the settings stored on the ixi-UMS Voice-Mail Server or in the LDAP database on the user object.

These features can be narrowed down further after activation on the "Notification" map.

Please note:

To create notifications, the function "Notifier Express" must be activated in the ixi-UMS Voice-Mail Server.

If the users record their greetings via the browser-based ixi-UMS Voice-Mailbox configuration, but not always from your office telephone, they can enter the number via which they want to record the greeting when activating the entry of **their own telephone number**.

By enabling "**Set own office hours**" the user can enter individual working times via the ixi-UMS Voice-Mailbox Configuration. Outside working hours, the Feierabenprofil takes effect.

access to the mailbox to listen to messages is performed with the "individual login" and not with an administrative login, the user must **enter his IMAP access data**. Depending on the LDAP/Mailserver used, the users have to enter their password and/or login name.

The interface for entering the required data can be made available in the ixi-UMS Voice-Mailbox Configuration.

Note: This option is only displayed for the user if the "Remote query" option is valid for the user.

Create announcements via TTS

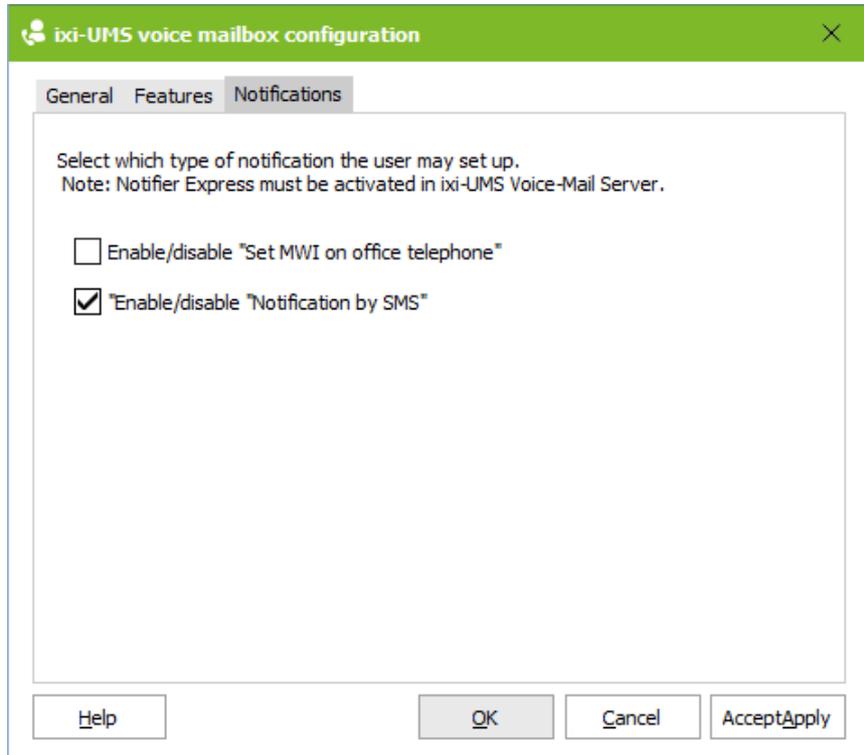
If the ixi-UMS Voice-Mail Server is configured to use "Text-to-Speech", the user can enter his greeting in the text field and have it created by the TTS Engine installed on the ixi-UMS Voice-Mail Server.

If users are to be able to **record announcements via Microphone**, the ixi-UMS User Portal must be available via HTTPS. This function is not available in Microsoft Internet Explorer.

4.3.6.3 Notification

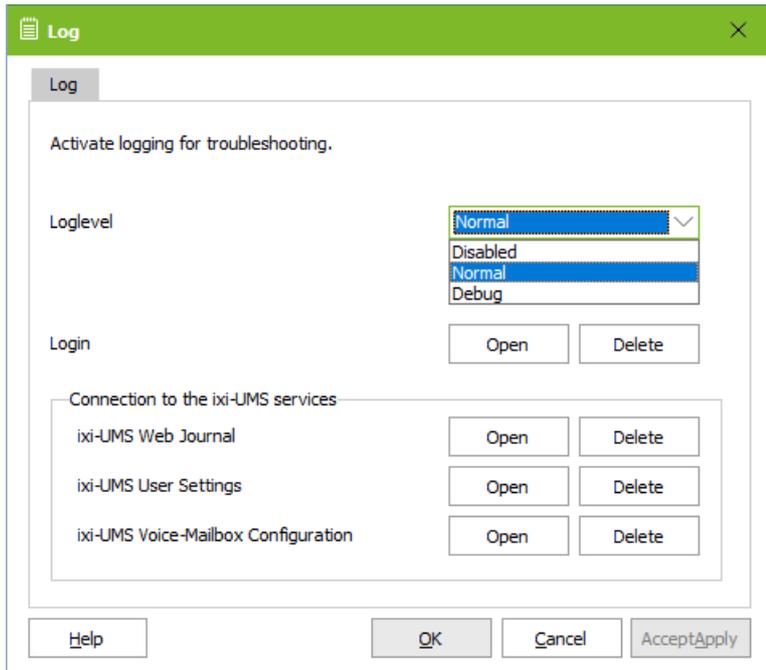
If you specify in the "Features" for the ixi-UMS Voice-Mailbox that the users are allowed to change their settings for the notifications themselves, this tab becomes visible and the available services can be restricted.

Please note that the features/functions (SMS, MWI) must be configured on the ixi-UMS Kernel and the required data must be entered in the user administration for each service.



4.4 Logging

Here you can log operations of the ixi-UMS User Portal and ixi-UMS Portal Server. The different logs cannot be activated individually.



Login:

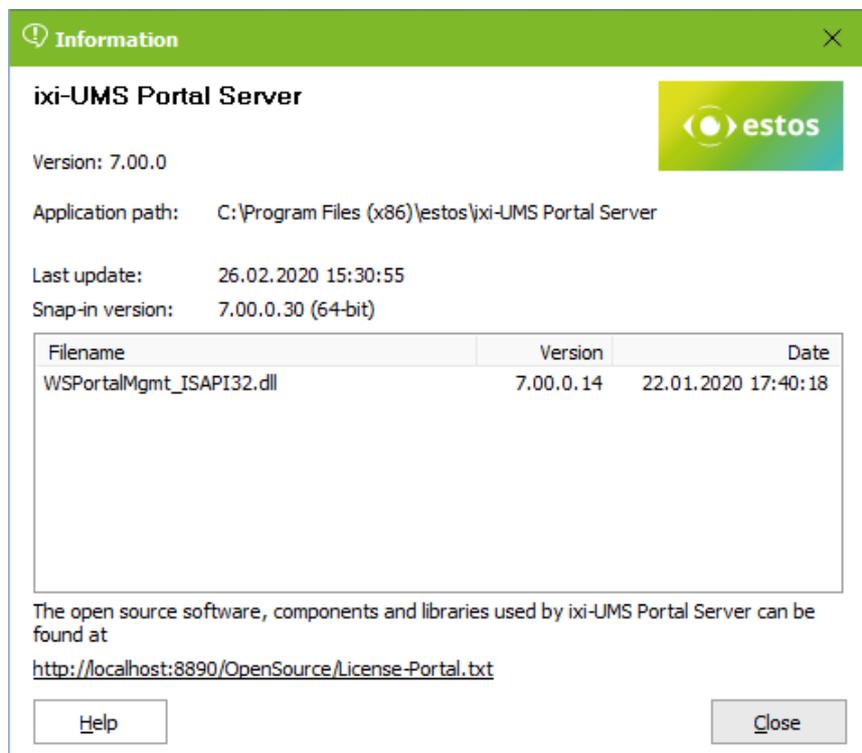
The logins of the users at the ixi-UMS User Portal with the necessary accesses to the LDAP database are logged.

Connection to the ixi-UMS services

If problems occur when reading and/or displaying the information in the ixi-UMS User Portal, the error in accessing the modules of the respective components is logged in the log files.

4.5 Information

Here you get information about version and installation path of the installed ixi-UMS Portal Server.



5 Info

5.1 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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5.2 Version

Software: ixi-UMS Portal Server
Version: 8.0
Manual: 11/21/2023