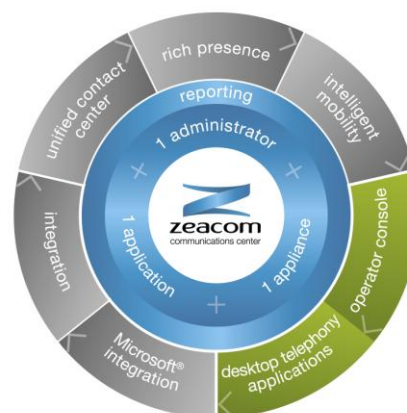


Unified Messaging for Lotus

Early Introduction Paper

Access your voice and fax messages from within your Lotus Notes email application and drive your Presence from your Appointment Calendar



Email is often the first port of call when checking for messages. Unified Messaging for Lotus lets you handle email, voice and fax messages in a single application, making you more efficient and productive. Schedule your Presence greetings to automatically reflect your Calendar status.

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Introduction

Unified Messaging (UM for Lotus allows for the consolidation of messages from different media types into a single 'email' inbox, accessible from Lotus Notes

UM users have the power to control how, when and in what order they wish to respond to voice and fax messages, just as they do with emails. Heavy users of email, voice messaging and fax will experience a significant increase in their productivity by eliminating the time spent accessing multiple messaging applications.

UM for Lotus is also ideal for employees who are often away from the office, giving them a single point of access for all their messages.

Business Drivers

- There are significant efficiencies in the ability to manage email, voice and fax messages from one central application, both in the time taken to clear messages and in terms of administering and managing a single solution.
- Calendar integration automatically activates your Presence greetings to reflect your Calendar status so your callers always receive up to date information
- Users who are away from the office are able to check their voice and fax messages remotely using iNotes¹. UM for Lotus is easy to use; you no longer have to dial into another system to listen to your voice messages, so toll costs are reduced.
- A common email interface eliminates the need to manage multiple applications leading to better voice and fax messaging management practices.
- Improve the flow of communication and the sharing of information within your organization. Voice and fax messages can be forwarded to colleagues and easily stored for future reference.

¹ The voice and fax messaging icon will not update from "unread" to "read" status when accessed from iNotes.

- Advanced voice messaging management functions can now be performed via the email application.
- The presentation and management of emails, voice messages and faxes in a single user interface enables them to be dealt with in order of their priority.

Key Features and Benefits

Features and Benefits

UM provides users with the best of Email, Fax and Voice Messaging functionality:

- **View messages from your email application** – using Caller ID, users can view caller phone numbers and see at a glance who called them or left a fax without even accessing the message.
- **Prioritize your messages** – access and respond to email, voice and fax messages in any order.
- **Access message content** – listen to voice messages using your PC speakers or your office extension; double-click on a fax item to view the fax.
- **Forward and distribute messages** – using standard email commands you can forward and distribute voice and fax messages to anyone with an email address worldwide.
- **Manage your messages** – treat voice and fax messages the same way you would email messages by deleting, saving or storing them into other folders for record keeping.
- **Customize UM** – configure your Mailbox to meet your business requirements, for example, set your preferences to automatically delete voice messages from your Inbox after listening to them.
- **Seamless interoperability between voice messaging, fax and email applications** – any action taken in one application is duplicated in the other.
- **Automatically change your Voice Messaging Profile for calendar appointments** - Each time you set up an appointment in your calendar, your chosen

Presence Profile is automatically activated at the appointment time. If you wish, Console, Desktop and Executive Insight users can even see your meeting title displayed on your Presence button.

- **Change your Profile back** - Set appointments to automatically switch your Presence Profile back to available, or you can change them manually when you return.
- **Keep your callers informed** – UM for Lotus allows seamless matching of up to 99 Presence Profiles with any Calendar appointment, so that as soon as the user sets an appointment, the appropriate greeting for that duration is automatically set too.
- **Access messages from iNotes** – users away from the office frequently can access all their email, voice and fax messages at the same time.
A .wav attachment is used to play voice messages.

Other Benefits

Combining Voice Messaging and Fax with your Email application provides an intuitive, time and cost efficient product

- **Less infrastructure** – implementation and administration costs are minimized by centralizing applications on a single platform, no other special hardware requirements.
- **Reduce time spent processing voice and fax messages** – by centralizing communications in your email application.
- **Easy to use** – the desktop user interface makes it easier to manage, keep track of and distribute voice messaging and fax correspondence.
- **Simplified Options** – Voice and fax messages can be easily saved from within Lotus Notes and stored indefinitely.
- **Effectively relay messages around the organization.** – Instead of transcribing the message and then re-typing the content for distribution, users can simply click Forward and enter an email address. Information is transferred accurately while maintaining an email audit trail.

- **Access voice and fax messages remotely** – Messages and faxes are automatically presented as .wav and .tiff types which can then be viewed and listened to remotely, providing the user can access email remotely. This eliminates the need to access two applications or to phone the office for messages.
- **Status icons** – customized icons clearly indicate whether a voice message has been listened to or a fax read.
- **Urgent and Private Messages are clearly marked** – If Voice messages are urgent or private this is clearly shown in the subject line of the email and using standard Lotus icons.






Prerequisites

In addition to the UM for Lotus module, each user requires a voice mailbox to support voice messaging functionality.



Fax Messaging is a prerequisite for fax capabilities.

Icons

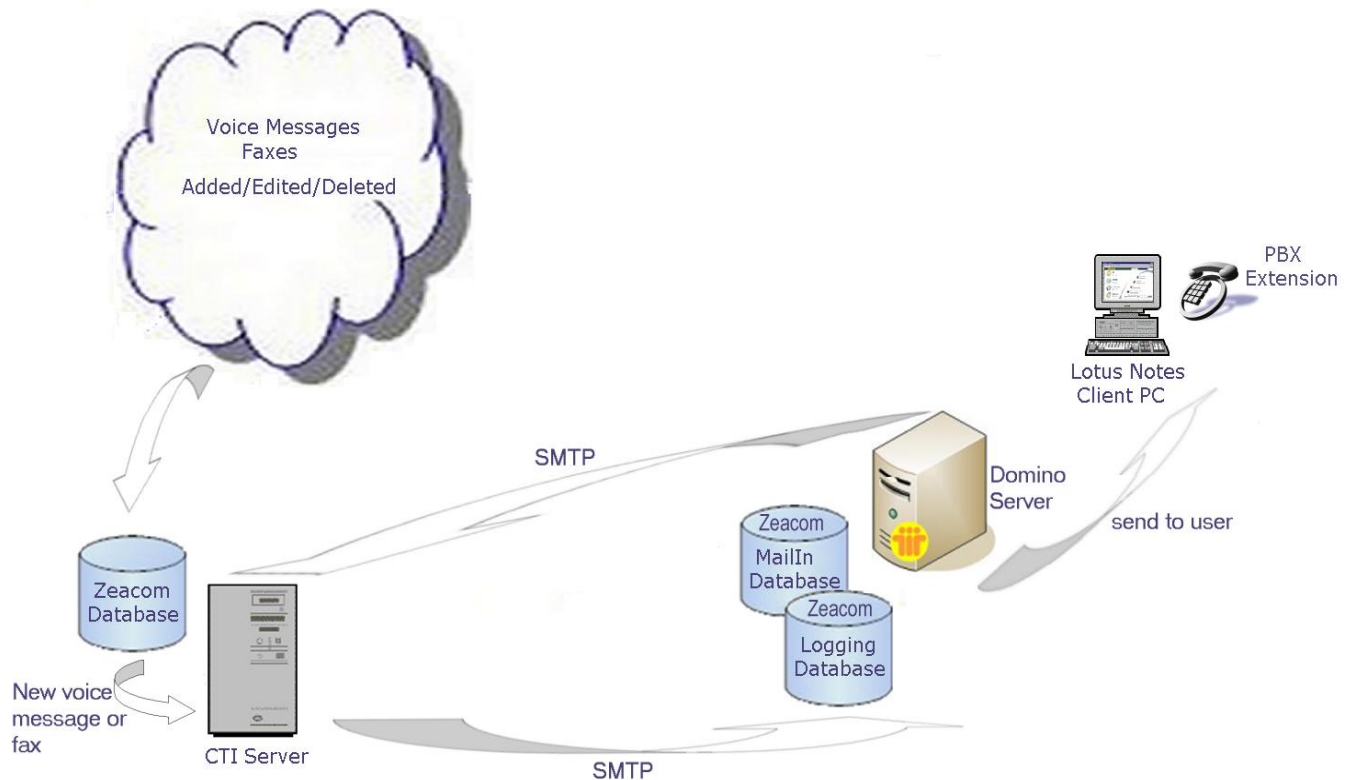
The following icons provide “at a glance” message type and status information.

-  New (unread) Voice Message
-  Read Voice Message
-  Saved Voice Message
-  New (unread) Fax
-  Read Fax

In addition, standard Lotus icons indicate private or urgent messages.

-  Private Message
-  Urgent Message

Physical Architecture Overview



How does UM for Lotus work?

Voice or fax messages from Zeacom's CTI Server are presented as emails in Lotus Notes. The messages are synchronized according to user customizable rules between the two systems.

UM for Lotus is synchronized by sending SMTP messages between the Zeacom and Domino servers containing synchronization information.

Example: When a new voice message arrives the CTI Server sends an SMTP message to the user's database, which is presented as their new Voice Message email. The user listens to the Voice message using Zeacom's Voice Message player in Lotus Notes. Hidden from the user, an SMTP message is sent to the CTI server to mark the Voice Message as "read". The light on the user's phone goes out and the Zeacom icon in Lotus Notes is changed from "unread voice message" to "read voice message".

Requirements

UM for Lotus is available with Zeacom Communications Center 4.1, as Early Introduction Release.

Customer Site Requirements

Administrator Skills required at Customer site	<p>Installation and setup of UM for Lotus is the responsibility of an authorized Zeacom installer.</p> <p>Customer Administration tasks include:</p> <ul style="list-style-type: none"> • Management of users and mailboxes. • Lotus Administrator skills including a good working knowledge of Domino and its security. Mailbox users will require their Mail File templates to be replaced. • One Mail-In and one Logging database will be added for each Domino Mail Server. • All users will require their Internet address to be populated within their Person document. The CTI Server uses this address to synchronize. • UM for Lotus runs Server side agents. These agents will require Administrative rights, including OS access (to write and read files) and Manager Rights over User Mailboxes.
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PBX Requirements

Switches Supported	4.1 Early Introduction will support all currently supported PBX types certified for Zeacom Communications Center V4.1.
Extra switch related hardware /software	None

Zeacom Server and Client Requirements

Zeacom Server	Please refer to Zeacom's Server and Client Requirements documentation. For other Server requirements refer to the Specifications documentation.
SPAM and Virus Protection	SPAM and virus protection is the customer's responsibility.

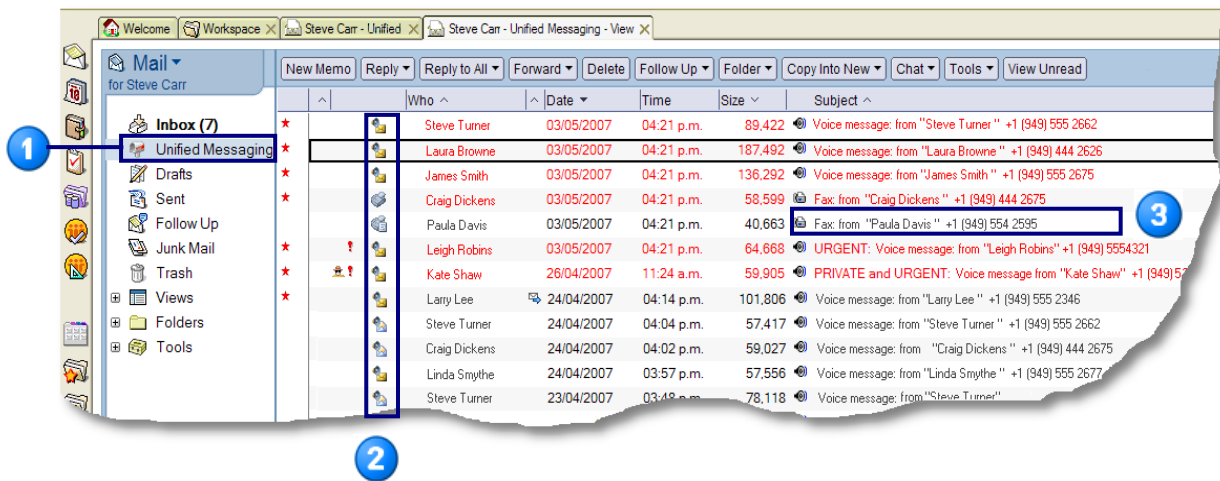
View Voice and Fax Messages

Zeacom's UM for Lotus application lets users view their voice and fax messages from within their email application. Voice and fax messages are clearly distinguishable from emails by unique icons and unread messages appear in **bold** so as to stand out clearly from read messages. Urgent voice messages are highlighted.

If Calling Line ID (CLI) is enabled, the name and telephone number of the contact will be displayed alongside each message assuming a Phonebook match is found. Phonebook is Zeacom's online contact database and usually contains the names and telephone numbers of all staff members, external contacts relevant to the company and your personal contacts. By identifying the caller in this way, Inbox lets you prioritize your voice and fax messages prior to listening to them.

Users can customize the way in which voice messages are displayed in their email application. For example, the user can choose to have a link to the voice message embedded into the email or have it shown as an attachment. Fax messages are shown as attachments.

- 1 Voice and fax messages are managed within the Unified Messaging folder
- 2 Icons clearly show whether the message is voice or fax type and whether the message is read or unread
- 3 The subject includes special information including caller name (if known) and if the message is private and/or urgent.

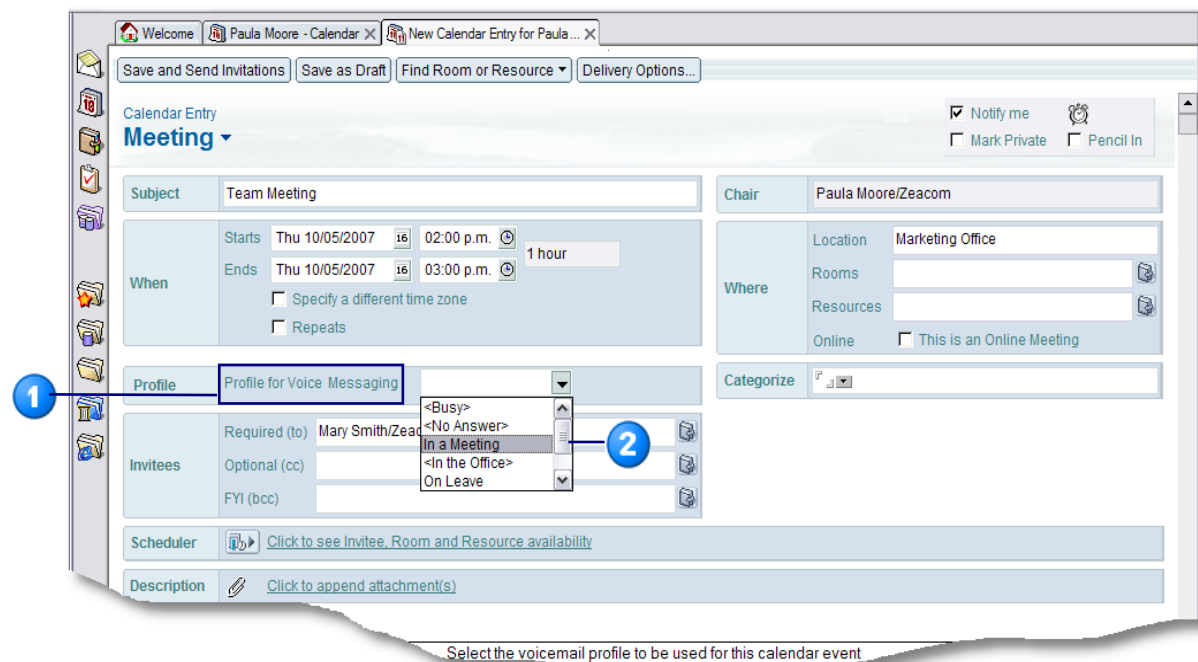


Create Calendar Events

Each time you set up an appointment in your calendar, your chosen Presence Profile is automatically activated at the appointment time. Your profile can be automatically switched back to available at the end of the calendar event or you can manually change it when you return.

Your greeting can optionally include an expected time of return by using the ETR feature within Voice Messaging.

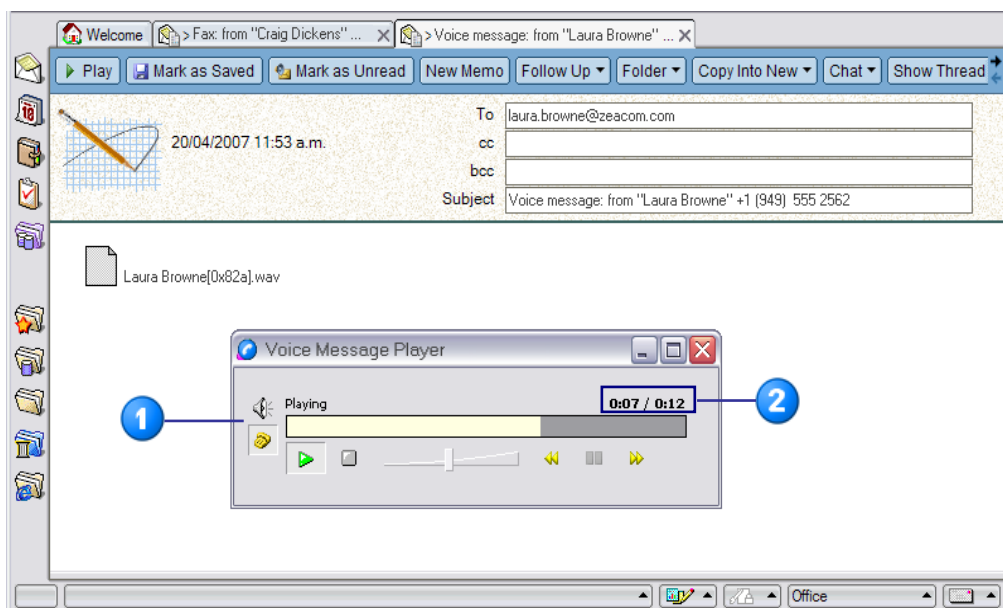
- 1 Select the Presence Profile you wish to play to callers for the duration of your Calendar Appointment.
- 2 UM for Lotus allows seamless matching of up to 99 Presence Profiles with any Calendar appointment.



Voice Message Player

When a Voice Message is sent to the Lotus Notes user, it will include both the Voice Message Player control and a regular file attachment (unless the user is offsite). You can forward the file attachment to an outside address.

- 1 The user can choose to either play the Voice Message from their office extension or from their PC speakers.
- 2 The message duration and current playback point are shown.



Zeacom Communications Center

System Prerequisites – Unified Messaging for Lotus

Prior to the installation of UM For Lotus, the Domino Server administrator must ensure the following server configuration tasks have been completed:

- The account that will be used to sign the .NTF template files and Mail-In Database has been set up with “Full access administrator” server access rights.
 - TCP/IP has been enabled on the domino DNS server and is running
 - If the Domino DNS server is unable to locate itself as a valid TCP/IP host then a server connection will need to be created. This designates the Domino DNS server as both the source and destination server.
 - SMTP has been configured on the Domino DNS Server. In Particular:
 - The SMTP Routing and SMTP listener tasks must be enabled.
 - The server must be configured to allow for SMTP to be used when sending messages outside the local internet domain.
 - All SMTP Server Tasks must be added and running.
 - The IP address of the CTI Server (e.g. 192.168.10.x) has been excluded from anti-relay checks. This is to allow Domino to relay SMTP traffic to and from the CTI server.
 - Pre-delivery agents have been enabled, with a pre-delivery agent timeout of at least 30 seconds.
- It is recommended that the Agent Manager Parameters be configured to allow for a minimum of 5 concurrent Daytime and 2 concurrent Night time agents.
 - It is recommended that antivirus software be configured to allow for unmonitored network traffic from the CTI server to the Domino DNS server.
 - The following tasks will be completed in conjunction with the Zeacom installer who will provide the required files. The Site Administrator must be available to assist with the following tasks:
 - The ZInboxController7.ntf and ZInboxMail7.ntf template files will be copied to the default Domino Data directory, these files must be signed with the server id. These templates contain the code that provides the functionality UM for Lotus offers. I.e. creating and managing voice emails and synchronizing the voice messaging with the Lotus Calendar. The Lotus mailbox and the Voice Messaging system are kept synchronized by exchanging hidden SMTP messages as notifications of changes. The main functionality is embedding the voice data into an email. This requires the code to be able to send and receive Emails. E.g. A user created a new Calendar appointment that uses the <In a Meeting> profile; the mail template will then send an email to the CTI server notifying it of the changes. The process of sending emails and executing code requires authentication which comes from the signing process. The standard mail templates provided by Lotus are signed using the server Id by default; UM for Lotus requires the same for its templates. The InboxController template contains two agents; the BeforeNewMailArrives and AfterNewMailArrives agents.

- As these agents have been signed with the Server's Id, they are able to access the mailboxes to modify and delete Voice and Fax emails. There are no agents (other than those already on the standard mail template) on the InboxMail template. The code in Zeacom's templates affects only Voice and Fax emails.
- A Mail-In Database will be created that specifies the SMTP email address and InboxController(R7) template. This database must be signed with the Server Id.

All Lotus Notes user profiles that will be utilizing UM for Lotus must be configured to inherit design from the ZInboxMail(R7) template. This is required in order to integrate to Lotus and to customise the display e.g. add a new form for Fax and Voice Emails; add a Profile selector to the Appointments form etc. If the mail template has already been customised Zeacom's code can be merged with the existing template. In order to facilitate this, we have placed most of the functionality in Libraries, most of our changes are additions, not modifications and documentation is available that provides the location of all code changes.

I _____ being
authorized staff member of _____,
confirm that I have read and fully understand
these requirements and agree the prerequisites
will be completed before the Zeacom Installer
arrives onsite.

Signed: _____

Date: _____

Position: _____



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