Unified Messaging Application

Installation and Configuration

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Installation and Configuration

About This Guide

This guide describes how to install and configure the Unified Messaging application for use with the following messaging systems:

- MERLIN® Messaging Release 4.0
- PARTNER® Messaging Release 7.0

Using this guide, you will learn:

- What the Unified Messaging Application can do
- How to create and configure a user account for the Unified Messaging Application on your Microsoft Exchange server or SMTP server
- How to install the Unified Messaging Application
- How to verify whether the Unified Messaging Application is installed properly
- How to maintain the Unified Messaging Application

Once the Unified Messaging Application is installed, you will use the MERLIN Messaging Release 4.0 System Administration application or PARTNER Messaging Release 7.0 System Administration application to administer the Unified Messaging Application for your system.

Intended Audience

This guide is intended for users who are responsible for managing and maintaining the messaging system. It is assumed that the user is experienced with Microsoft® Exchange administration.

What is the Unified Messaging Application?

The Unified Messaging Application is a software application that interfaces between the messaging system and email servers (Microsoft Exchange servers and SMTP servers). The Unified Messaging Application receives voice mail messages from the messaging system and forwards them to the email server(s) so that users can access their voice messages from their email account. Users can view these voice mail messages as they would normally view their email messages using any email client (for example, Microsoft Outlook for an Exchange email server, and Yahoo mail or AOL mail for SMTP email servers). The mail messages have attached .WAV files that the users can play using an audio player on their PC.

If the email server is a Microsoft Exchange server, users' email accounts and voice mailboxes can be synchronized. If a user's email account and voice mailbox are synchronized, the message status (for example, new, old, delete) is reflected in both the email and voice mail mailboxes, regardless of where the status was changed. For example, when a message in the email account is deleted, the corresponding entry in the voice mailbox is also deleted. Conversely, when a message in the voice mailbox is deleted, the corresponding entry in the email account is deleted.

> ⇒ **NOTE:**
> *You must use the MERLIN Messaging Release 4.0 System Administration application or the PARTNER Messaging Release 7.0 System Administration application to administer the Unified Messaging application.*

PC Requirements

The Unified Messaging Application requires an IBM PC-compatible that meets or exceeds the following requirements:

- One of the following operating systems:
  - Microsoft Windows® 2000 Server, Service Pack 1
  - Microsoft Windows 2000 Professional, Service Pack 1
  - Microsoft Windows NT® 4.0 Server, Service Pack 5
  - Microsoft Windows NT 4.0 Workstation, Service Pack 5
- Microsoft Office 97 or later installed
- TCP/IP connectivity to the messaging system to allow message integration
- If Microsoft Exchange integration is required:
  - If the Unified Messaging Application will run on the same PC as the Exchange server, that PC must meet or exceed the following requirements:
    - a Pentium® II, 100 MHz processor
    - 256 MB of RAM
    - 2 GB of free hard disk space.
  - If the Unified Messaging Application is running on a different PC from the Exchange server, that PC must meet or exceed the following requirements:
    - a Pentium-based processor
    - 64MB of RAM
    - 20 MB of free hard disk space

  ### ➡ NOTE:
  The PC must belong to the same domain as your Exchange server.

- If SMTP forwarding is required, the PC must meet or exceed the following requirements:
  - Pentium-based processor
  - 64 MB of RAM
  - 20 MB of free hard disk space.

For users to receive email messages with voice mail message attachments from the messaging system via the Unified Messaging Application, their PCs must meet or exceed the following requirements:

- Pentium-based processor running Microsoft Windows 2000 Professional, Microsoft Windows NT 4.0 Workstation, Microsoft Windows 98, or Microsoft Windows 95
- a sound card
- a software application (such as Windows Media Player) that can play .WAV files
- speakers/headphone to listen to voice mail messages (which are sent as .WAV files)
- a valid email account
- one of the following email clients:
    - **For Microsoft Exchange integration:**
      An email client supported by Microsoft Exchange (for example, Outlook 98 or Outlook 2000 clients).
    - **For SMTP forwarding:**
      An email client supported by the end user's SMTP mail server.

Installation and Configuration Steps

To install and configure the Unified Messaging Application, perform the following steps:

1 Configure a user account for the Unified Messaging Application on your server.

Since the Unified Messaging Application will run as a service, you must create a user account for the Unified Messaging Application. This account must be set up as a domain user with Administrator privileges on the PC where you will install the Unified Messaging Application. (This will enable the Unified Messaging Application to access the files/registry of that PC.) If you are using Microsoft Exchange, this user account must also have permission to access the Microsoft Exchange server.

Depending on your configuration, perform the appropriate procedure:

- If you are using an Microsoft Exchange 2000 server, go to "Using the Unified Messaging Application with Microsoft Exchange 2000" on page 10.

- If you are using an Microsoft Exchange 5.5 server, go to "Using the Unified Messaging Application with Microsoft Exchange 5.5" on page 16.

- If you are using an SMTP server, go to "Using the Unified Messaging Application with an SMTP Server" on page 20.

2 Install the Unified Messaging Application.

Before installing the Unified Messaging Application, you must have the following information:

- the domain name of the PC on which you will install the Unified Messaging Application.

- the name and password of the user account you created for the Unified Messaging Application in Step 1.

To install the Unified Messaging Application, go to "Installing the Unified Messaging Application Software" on page 23.

Using the Unified Messaging Application with Microsoft Exchange 2000

Perform the steps in this section if you want to use the Unified Messaging Application with Microsoft Exchange 2000.

The Unified Messaging Application can either be co-resident with MS Exchange 2000 on the same PC or it can run on a different PC. However, to allow synchronization between email accounts and the messaging system, the PC running the Unified Messaging Application and the Exchange server must be on the same domain or are trusted domains.

To use the Unified Messaging Application with MS Exchange 2000, you must perform the following steps:

1 Create a domain user account for the Unified Messaging Application.

2 Assign local Administrator privileges to the domain user account you created for the Unified Messaging Application.

3 Assign Microsoft Exchange access privileges to domain user account for the Unified Messaging Application.

Step 1: Create a Domain User Account for the Unified Messaging Application

In this procedure, you will create a domain user account for the Unified Messaging Application.

At Windows 2000 Domain Controller, perform the following steps:

1 Select **Start -> Programs -> Administrative Tools -> Active Directory Users and Computers.**

   The Active Directory Users and Computers window appears.

2 Select the domain of the Exchange server and PC where the Unified Messaging Application will be installed.

3 Open the Users folder.

4 Click **Action** from the menu bar.

5   Select **New>User**.

The New Object - User dialog box appears.

6   Fill in the account information, and click the **Next** button.

The next New Object - User dialog box appears.

7   Fill in the account information.

> ⊟⟩ **NOTE:**
> *You must assign a password to this account and select the*
> ***Password never expires*** *check box.*

8   Click the **Next** button.

The next New Object - User dialog box appears.

9   Make sure the **Create an Exchange mailbox** check box is checked.

10 Click the **Next** button.

11 Click the **Finish** button.

Go to .

Step 2: Assign Local Administrator Privileges to the Unified Messaging Application Account

In this procedure, you will assign local Administrator privileges to the account you created for the Unified Messaging Application so that it can edit information on the PC where the Unified Messaging Application will be installed.

Depending on the operating system of the PC on which you will install the Unified Messaging Application, perform the appropriate step:

- For Microsoft Windows 2000 Domain Controller, go to .
- For Microsoft Windows 2000 Server or Windows 2000 Professional, go to .
- For Microsoft Windows NT Server or Workstation, go to .

Using a Microsoft Windows 2000 Domain Controller

If you will install the Unified Messaging Application on Microsoft Windows 2000 Domain Controller, perform the following steps from that PC:

1 Right-click on the account you created.

2 Select **Properties**.

The Properties dialog box appears.

3 Click the **Member Of** tab.

The Member Of tab appears.

4 Click the **Add** button.

The Select Groups dialog box appears.

5 Select **Administrators**, and then click the **Add** button.

6 Click the **OK** button to close the Select Groups dialog box.

7 Click the **OK** button to close the Properties dialog box.

Go to "Step 3: Assign Microsoft Exchange Access Privileges to the Unified Messaging Application Account" on page 14.

Using Microsoft Windows 2000 Server/Professional

If you will install the Unified Messaging Application on Microsoft Windows 2000 Server or Professional, perform the following steps from that PC:

1 Log on as system administrator:

- For Windows 2000 Server: Select **Start -> Program -> Administrative Tools -> Computer Management**

- For Windows 2000 Professional: Right-click **My Computer**, and select **Computer Management**.

2 Double-click on **Local Users and Groups**.

3 Double-click on **Groups**.

4 Double-click on **Administrators**.

5 At the Administration Properties menu, click **Add.**

The Select Users and Groups dialog box appears.

6 From the Look-in box, select the appropriate domain.

7 Select the account you created for the Unified Messaging Application service, and then click the **Add** button.

8 Click the **OK** button to close the Select Users or Groups dialog box.

Go to .

Using Microsoft Windows NT Server/Workstation

If you will install the Unified Messaging Application on Microsoft Windows NT Server or Workstation, perform the following steps from that PC:

1 From the Start menu, select **Programs>Administrator Tools>User Manager**.

   The User Manager window appears.

2 At the Groups panel, double-click **Administrators** to show the Local Group Properties dialog box.

3 Click **Add** at the menu to open the Add Users and Groups dialog box.

4 Select the account you created for the Unified Messaging Application, and add it to the Administrators group.

Go to "Step 3: Assign Microsoft Exchange Access Privileges to the Unified Messaging Application Account" on page 14.

Step 3: Assign Microsoft Exchange Access Privileges to the Unified Messaging Application Account

In this procedure, you will configure the Unified Messaging Application account to access the Exchange server.

If there is more than one Exchange server in your domain and your unification involves multiple Exchange servers across the domain, it is necessary that you repeat the permission assignment procedures on each of these servers.

At the Exchange 2000 server, perform the following steps:

1 From the Start menu, select **Programs>Microsoft Exchange>System Manager**.

   The Exchange System Manager window appears.

2 On the left panel, under your domain, double-click **Administrative Groups**.

3 Open the appropriate Administrative folder.

4 Double-click **Servers**.

5 Right-click the appropriate Exchange server.

   A menu appears.

6 Select **Properties**.

The Properties dialog box appears.

7 Click on the **Security** tab.

The Security tab appears.

8 Click the **Add** button.

The Select Users, Computers, or Groups dialog box appears.

9 Select the account you created for the Unified Messaging Application service, and then click the **Add** button.

The account is added to this group.

10 Click the **OK** button.

11 Make sure that all the permissions check boxes are checked for this account in the Security tab of the Properties dialog box.

12 Click the **OK** button.

Now that the user account for the Unified Messaging Application is configured, install the Unified Messaging Application software. Go to "Installing the Unified Messaging Application Software" on page 23.

Using the Unified Messaging Application with Microsoft Exchange 5.5

Perform the steps in this section if you want to use the Unified Messaging Application with Microsoft Exchange 5.5.

To allow synchronization between email accounts and the messaging system via the Unified Messaging Application, the Windows NT PC and the Exchange server must be on the same domain, or are trusted domains.

1 Create a domain user account for the Unified Messaging Application.

2 Assign local Administrator privileges to the domain user account you created for the Unified Messaging Application.

3 Assign Microsoft Exchange access privileges to the domain user account for the Unified Messaging Application.

Step 1: Create a Domain User Account for the Unified Messaging Application

In this procedure, you will create a domain user account for the Unified Messaging Application.

At Windows Domain Controller, perform the following steps:

1 Select **Start>Programs>Administrator Tools>User Manager for Domain**.

2 Select **User** on the menu bar.

3 Select **New User** from the menu.

4 Enter the account information.

> $\Longrightarrow$ **NOTE:**
> *You must assign a password to this account and select the* **Password never expires** *check box.*

5 Click the **Add** button.

The User Properties dialog box appears.

6 Fill in the information.

7 Click **OK** and close the dialog boxes.

Go to .

Step 2: Assign Local Administrator Privileges to the Unified Messaging Application Account

In this procedure, you will assign local Administrator privileges to the account you created for the Unified Messaging Application so that it can edit information on the PC where the Unified Messaging Application will be installed.

At the PC where you will install the Unified Messaging Application, perform the following steps:

1 Select **Start>Programs>Administrator Tools>User Manager for Domain**.

> $\implies$ **NOTE:**
> *If you are going to install the Unified Messaging Application on a PC that is a stand-alone member server or a workstation, that PC will not have the Administrator Tools program available from the Start menu. Select **Start>Programs>User Manager** to start the programming.*

2 At the Groups panel, double-click **Administrators**.

The Local Group Properties dialog box appears.

3 Click the **Add** button.

The Add Users and Groups dialog box appears.

4 Select the Unified Messaging Application account and add it to the Administrators group.

Go to .

Step 3: Assign Microsoft Exchange Access Privileges to the Unified Messaging Application Account

In this procedure, you will configure the Unified Messaging Application account to access the Exchange server.

This permission assignment will allow this account to grant access to different Exchange server(s) in your domain. Therefore it is **unnecessary** to repeat the permission assignment on each of these Exchange server(s), even if your unification involves multiple Exchange servers across the domain.

At the Exchange server, perform the following steps:

1   Select **Start>Program>Microsoft Exchange>Microsoft Exchange Administrator**.

    The Microsoft Exchange Administrator window appears.

2   Select your Organization Unit.

3   From File menu, select **Properties**.

    The Properties dialog box appears.

4   Click the **Permissions** tab.

    The Permissions tab appears.

5   Click the **Add** button.

6   Add the privileged account to the group.

7   At the Organization Properties dialog box, make sure the privileged account has Service Account Admin privileges. (In Roles box, select **Service Account Admin**.) Return to the Exchange Admin menu.

8   Double-click your Site.

9   From the File menu, select **Properties**.

    The Properties dialog box appears.

10 Click the **Permission** tab.

11 Add the privileged account to the group. Make sure that the account has Service Account Administration privileges. (See Step 6 above).

12 Return to the Exchange Administrator window.

13 Select **Site>Configurations**.

14 From the File menu, select **Properties**.

The Properties dialog box appears.

15 Click the **Permission** tab.

16 Select the Unified Messaging Application account. Add it to the group.

17 Make sure that the account has Service Account Admin privileges. (In Roles box, select **Service Account Admin**.)

Now that the user account for the Unified Messaging Application is configured, install the Unified Messaging Application software. Go to "Installing the Unified Messaging Application Software" on page 23.

Using the Unified Messaging Application with an SMTP Server

Perform the steps in this section if you want to use the Unified Messaging Application with an SMTP server (for example, a UNIX email server).

The PC where the Unified Messaging Application is to be installed needs a user account that has local Administrator privileges. This allows the Unified Messaging Application to access local files and to forward voice messages to your SMTP Server.

For the Unified Messaging Application to work with an SMTP server, you must create *one* of the following accounts:

- a local user account on the PC where you are installing the Unified Messaging Application, or
- a domain user account. (A domain user account provides more flexibility than a local user account.)

If your network is currently set up with a domain name, then using a domain account will make it easier to introduce Microsoft Exchange unification in the future. You will be able to re-use the domain account you will be creating here with Microsoft Exchange.

If your network is configured as a "workgroup" rather than a domain with a domain controller, or if you have no plans to use Microsoft Exchange unification in the future, you should create a local user account for your workgroup. If you decide to use Microsoft Exchange unification in the future, you will have to uninstall and re-install the Unified Messaging Application with a new domain account.

If you want to create a local user account for the Unified Messaging Application, perform one of the following steps:

- On a PC running Microsoft Windows 2000, go to "Create a Local User Account on a Microsoft Windows 2000 PC" on page 21.
- On a PC running Microsoft Windows NT, go to "Create a Local User Account on a Microsoft Windows NT PC" on page 22.

If you want to create a domain user account for the Unified Messaging Application, perform one of the following steps:

- On a PC running Microsoft Windows 2000, perform the following steps:

  1 Go to "Step 1: Create a Domain User Account for the Unified Messaging Application" on page 10.

  2 Go to "Step 2: Assign Local Administrator Privileges to the Unified Messaging Application Account" on page 11.

- On a PC running Microsoft Windows NT, perform the following steps:

  1 Go to "Step 1: Create a Domain User Account for the Unified Messaging Application" on page 16.

  2 Go to "Step 2: Assign Local Administrator Privileges to the Unified Messaging Application Account" on page 17.

Create a Local User Account on a Microsoft Windows 2000 PC

For a PC running Microsoft Windows 2000, perform the following steps:

1 Log on as local Administrator.

2 Right-click **My Computer**.

3 Select **Manage** from the menu.

The Computer Management window appears.

4 Select **Local Users and Groups**.

5 Open Users folder.

6 Click **Action** on the menu bar.

7 Select **New User**.

8 Enter the account information for the Unified Messaging Application.

> $\implies$ **NOTE:**
> *Do not insert any spaces when entering the account information.*

9 Right-click the account you just created for the Unified Messaging Application.

10 Select **Properties** from the menu.

The Properties dialog box appears.

11 Click the **Member Of** tab.

The Member Of tab appears.

12 Click the **Add** button.

13 Add Administrator to this account.

14 Assign Administrator privileges to this account.

Now that the user account for the Unified Messaging Application is configured, install the Unified Messaging Application software. Go to "Installing the Unified Messaging Application Software" on page 23.

Create a Local User Account on a Microsoft Windows NT PC

For a PC running Microsoft Windows NT, perform the following steps

1 Select **Start>Programs>Administrative Tools>User Manager for Domains**.

2 Select **User and then New User** from the drop-down menu.

3 Fill in the account information.

> $\implies$ **NOTE:**
> *Do not insert any spaces when entering the account information.*

4 Select **Groups** and assign Administrator privileges to this account.

Now that the user account for the Unified Messaging Application is configured, install the Unified Messaging Application software. Go to "Installing the Unified Messaging Application Software" on page 23.

Installing the Unified Messaging Application Software

To install the Unified Messaging Application, you need the following information:

- The full computer name (including the domain) of the PC to which you will install the Unified Messaging Application. You can determine the full computer name by right-clicking on the My Computer icon of that PC and selecting **Properties**. The System Properties dialog box appears. Click the **Network Identification** tab. The full computer name is displayed.
- The name and password of the user account you created for the Unified Messaging Application service.

To install the Unified Messaging Application, perform the following steps:

1 Insert the Messaging Library CD into the PC.

  The Welcome dialog box appears.

2 Click **Unified Messaging Application**.

  The Welcome dialog box appears.

3 Click the **Next** button.

  The Readme File dialog box appears.

4 When you are finished reviewing the readme file, click the **Next** button.

  The Select Destination Directory dialog box appears.

5 Specify the directory where you want to install the Unified Messaging application. By default the software will be installed into C:\Program Files\Unified Messaging Application. Use the **Browse** button.

6 Click the **Next** button.

  The Account Information dialog box appears.

7 Perform one of the following steps:

- **If you created a domain account:**

  In the Domain Name box, enter the full computer name (including the domain) of the PC to which you are installing the Unified Messaging Application.

- **If you created a local account:**

  In the Domain Name box, enter the computer name (excluding the domain) of the PC to which you are installing the Unified Messaging Application.

8 In the Account Name box, enter the account name you created for the Unified Messaging Application service.

9 In the Password box, enter password for this account.

10 Click the **Next** button.

The Ready to Install dialog box appears.

11 Click the **Next** button.

The Installing message box appears, showing the status of the installation. When the installation is complete, a message box appears.

12 Click the **OK** button.

The SMTP Service Install message box appears.

13 Click the **OK** button.

The Installation Complete message box appears.

14 Click the **Finish** button.

Next, you must configure the Unified Messaging Application. Go to "Verifying the Installation" on page 26.

Configuring the Unified Messaging Application

To configure the Unified Messaging Application, perform the following steps:

1 Start the MERLIN Messaging Release 4.0 System Administration application or PARTNER Messaging Release 7.0 System Administration application and log into the system.

2 Click the **System Properties** button.

   The System Properties window appears.

3 Click the **Parameters** button.

   The System Parameters window appears.

4 In the IP Address box, enter the IP address of the PC where the Unified Messaging Application is installed, and then click the **Save IP** button.

   The Unified Messaging button will be displayed in main window of the application.

   If you installed the Unified Messaging Application on a PC that has Microsoft Exchange Server installed, the information for the Exchange server will be added automatically to the MERLIN Messaging Release 4.0 System Administration application or PARTNER Messaging Release 7.0 System Administration application.

   If you installed the Unified Messaging Application on a PC that does not have Microsoft Exchange Server installed, you must add the Exchange server(s) to the MERLIN Messaging Release 4.0 System Administration application or PARTNER Messaging Release 7.0 System Administration application. See the topic "Add a Server" in the online help for the MERLIN Messaging Release 4.0 System Administration application or PARTNER Messaging Release 7.0 System Administration application.

5 Administer the Unify with Email for each user's mailbox that will use the Unified Messaging Application. See the "Set Unify with Email for a Mailbox" topic in the MERLIN Messaging Release 4.0 System Administration or PARTNER Messaging Release 7.0 System Administration online help.

Next, you should verify the installation. Go to "Verifying the Installation" on page 26.

Verifying the Installation

To verify the Unified Messaging Application installation:

1 Open the Control Panel window.

2 Double-click on **Administrative Tools**.

The Administrative Tools window appears.

3 Double-click on **Services**.

The Services window appears.

4 Make sure the Unified Messaging Application service is present in this window.

For this service, the status should be "Started."

If the service did not start, perform the following steps to start it manually:

      a Select the Unified Messaging Application service.

      b Right-click the mouse on the service name.

      A menu appears.

      c Select **Properties**.

      The Properties dialog box for the selected service appears.

      d Click on the **Log On** tab.

      e In the Password box, enter the password for the Unified Messaging Application account.

      f In the Confirm Password box, re-enter the password.

      g Click the **OK** button.

      The status should be "Started" for the service.

Maintaining the Unified Messaging Application

As system administrator, you should perform the following tasks periodically:

• back up the Unified Messaging configuration files
• view the Unified Messaging Log

Back Up the Configuration Files

The Unified Messaging configuration files contain all of the settings for the Unified Messaging application and should be backed up regularly. If the data in these files become corrupted, and you did not back up these files previously, you can lose all of the Unified Messaging Application settings.

To back up the Unified Messaging Application configuration files, make copies of the following files:

• umconfig.dat
• umconfigB.dat
• umsout.dat
• umsoutB.dat

These configuration files are located the directory where the Unified Messaging Application is installed. (The default directory is C:\Program Files\Unified Messaging Application.)

View the Unified Messaging Application Log

The Unified Messaging Application maintains a log of events. You set the types of events that are logged from the MERLIN Messaging Release 4.0 System Administration application or PARTNER Messaging Release 7.0 System Administration application. (See "Setting the Event Log" in the online help for the MERLIN Messaging Release 4.0 System Administration application or PARTNER Messaging Release 7.0 System Administration application.)

Each record in the Event Log contains the following information:

- event type (INFO or ERROR)
- severity level (1 through 4, with 1 being the highest severity and 4 the lowest severity)
- thread ID
- date event occurred
- time event occurred
- message

To view this file:

1 Start Windows Explorer.

2 Access the directory where the Unified Messaging Application was installed. (The default directory is C:\Program Files\Unified Messaging Application.)

3 Select the file *umslog.csv.*

4 Make a copy of this file.

> ⇛ **NOTE:**
> *Never open the Unified Messaging log (umslog.csv). Always open a copy of this file.*

5 Open the copy you created.

Troubleshooting

This section describes the problems you may encounter when using the Unified Messaging Application.

Problem 1:   A user's email account is not receiving the voice mail message (.WAV files) from the messaging system.

Perform the following steps:

1 Verify that the Unify with Email feature is enabled for the user's mailbox extension. (See the "Set the Unify with Email" topic in the online help of the MERLIN Messaging Release 4.0 System Administration application or PARTNER Messaging Release 7.0 System Administration application.

2 Examine the Unified Messaging Log. See .

Problem 2:   The Unified Messaging Application is not sending email.

This problem may occur if you have SMTP forwarding configured and your Internet service provider (ISP) blocks port 25. Perform the following steps:

1 Start Windows Explorer.

2 In the Programs\Unified Messaging Application folder, double-click on **smtpexp.exe**.

The EasyMail SMTP Express icon appears in the system tray.

3 Double-click on the **EasyMail SMTP Express** icon in the system tray.

The EasyMail SMTP Express dialog box appears.

4 Click the **Routing** tab.

The Routing tab appears.

5 Select the **Enable Fixed Route** check box in the Fixed Route area.

6 In the Domain box, enter the domain name for the server.

7 In the Server box, enter the name of the server.

8 In the Port box, enter the port number. Be sure to enter a port number other than 25.

9 Click the **OK** button.