



A MITEL  
PRODUCT  
GUIDE

# HiPath DS-Win V4

DS-Win V4, DS View

User's Guide

09/2024

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# Contents

<b>1 DS-Win V4</b>	<b>5</b>
1.1 Features of DS-Win V4	5
1.2 Configuration Overview	7
1.3 Concept of the DS View User Manual	8
<b>2 Data View</b>	<b>9</b>
2.1 Starting DS-Win	9
2.2 Settings	10
2.2.1 Application Settings	10
2.2.2 DS-Win Presence Settings	12
2.2.3 AC-Win Settings	14
2.2.4 BLF-Win Settings	18
2.3 The Standard Screen	19
2.4 Searching for Data	22
2.4.1 Speed Search (F5) and Automatic Dialing	22
2.4.2 Result Search (F6)	23
2.5 Pre-Selecting Areas	23
2.6 Viewing Search Results	24
2.6.1 Displaying Detailed Data	24
2.6.1.1 »Search for subscribers« Tab	24
2.6.1.2 »Selected subscriber« Tab	27
2.6.2 Altering Sort Settings	28
2.6.3 Deleting Search Criteria	28
2.6.4 Printing Results	29
2.7 Editing Records	30
2.7.1 Editing Records with the Control Buttons	30
2.7.2 Editing Combination Boxes with the Keyboard	31
2.8 Opening an Existing Database in DS View	31
<b>3 E-Mail Client and Presence Management</b>	<b>33</b>
3.1 E-Mail Client	33
3.1.1 Features	33
3.2 Configuration of the E-Mail Client	35
3.2.1 Prerequisites	35
3.2.2 Customizing Customer-Specific Dialogs / Configuring a Button for E-Mail	36
3.2.3 E-Mail Settings	37
3.2.3.1 E-Mail Type	39
3.2.3.2 Defaults	39
3.2.3.3 SMTP Server	40
3.2.3.4 SMTP Relay	41
3.2.3.5 MAPI/Outlook E-mail User Interface	41
3.2.3.6 Outlook/OLE	41
3.3 Presence Management for DS-Win V4	42
3.3.1 Description of DS-Win Presence Management	42
3.3.2 Configuration Requirements	43
3.3.2.1 Outlook	43
3.3.3 Description of the »Presence« Window	44
3.3.4 Extreme Situations	46

## Contents

3.3.5 Performance .....	47
3.3.6 Creating Custom Security Settings .....	48

# 1 DS-Win V4

DS-Win V4 is an electronic phone book designed for attendant consoles and office workstations. It consists of **DS View** for the application as well as **GUI Designer** and **DS-Admin** for customization and modifications. It has been designed on the basis of the latest technical know-how and is extremely user-friendly. The wide range of features offered by **GUI Designer and DS Admin** enable you to configure your phone directory to suit your special requirements and thus optimize it for your work.

## 1.1 Features of DS-Win V4

### Application Areas

The **DS-Win V4** electronic phone book can be integrated fully in the PC attendant console **AC-Win IP V2** and **BLF-Win V4**. Used in conjunction with this product, it provides a complete system that leaves nothing to be desired in terms of functionality, flexibility and user convenience. No matter whether you are looking for the phone number of a subscriber, a particular key word, a specialist field or a sphere of responsibility, all you have to do is press a few keys and **DS View** does the rest.

DS-Win V4 can, however, also be used on an office workstation. The integrated dialing aid allows a call to be set up automatically from the connected telephone after the desired call partner has been found.

### DS-Win Characteristics

The **DS-Win V4** electronic phone book is a directory service that can be customized for use on a PC and in a client/server configuration. The following functions are available:

- Telephone information system for attendant console and/or workstation with **DS View** functions
- Configuration of the database and the user interface to one's own requirements with **DS-Win Designer**
- Administration of all subscriber data including display of notes
- Distributed database, client/server technology
- Synchronization with host databases via LAN

Please see the Release Notes for the current supported Windows versions.

### Individually Configurable Database

The new **DS-Win V4** database provides you with tables in which you can record data such as employee names, room numbers, departments, e-mail addresses, product catalogs, keyword lists and much else. Apart from permanently set tables

in which you can adapt the fields to suit your requirements you also have the option of adding new fields and even of creating new tables. This is particularly useful if you want to have access to information that has only an indirect bearing on the telephone directory, such as hotel or restaurant addresses, notes, procedures, and so on.

A corresponding JDBC driver also provides access to other databases such as MS SQL Server 2005, MS Access and MYSQL. Existing databases containing your personal data, for example, can thus be used.

#### **Individually Configurable User Interface**

You yourself can determine how your data will be displayed on the screen. For this purpose, **DS-Win V4** includes a design tool (see the **DS-Win V4** Designer manual) that provides you with all the resources you need to configure the output of information on the screen in line with the requirements of your work.

#### **Finding and Modifying Data**

There are two basic search modes available: speed search and query.

- For a speed search, enter individual characters in a search field and move progressively closer to the subscriber or term you are looking for until the "correct" one is finally found.
- In query mode, enter several search criteria, where necessary, and let the system search for all data records that correspond to these criteria.

You can move (navigate) in the dataset, rearrange the search result according to different criteria, edit or delete records or add new ones.

#### **Dial Functions**

DS-Win supports not only the automatic telephone dialing equipment of the PC attendant console AC-Win, but also the optiPoint telephones through the USB interface. It can thus be used at both an attendant console as well as an ordinary workstation.

#### **Printing Data**

You can select different layouts for printing your data records or search results with the option of printing the entire dataset or individual records. DS-Win iReport from JasperSoftuses the software which can be used to create test pages.

#### **Import/Export**

Large volumes of data can be imported and exported via a flexible interface. The DS-Win database can be synchronized with host databases, for example the central HDMS/OpenScape 4000 Manager (OS4K) database, either manually or automatically according to a predefined timetable.

## 1.2 Configuration Overview

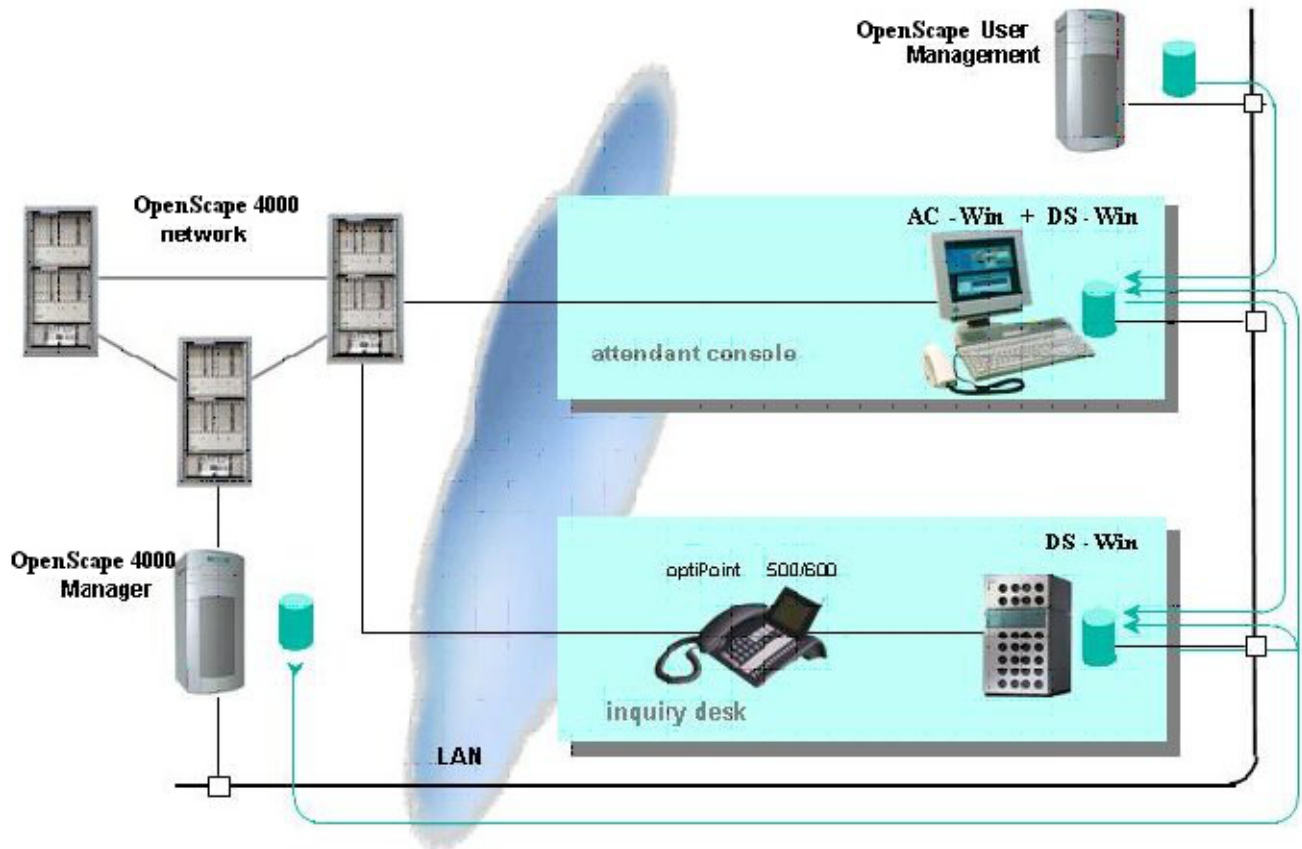


Figure 1

Configuration Overview: DS-Win - OpenScope 4000 Network

## **1.3 Concept of the DS View User Manual**

### **Purpose of this Manual**

This manual describes how to operate the system from the perspective of the user. The manual should

- describe the correct procedure for using DS-Win functions,
- indicate the correlation between the individual functions,
- serve as a reference for users familiar with the product.

An index and glossary are included.

### **Structure of the Manual**

The application-based chapters of the DS View User Manual are:

- [Chapter 2](#):  
Using the Data View Window, which provides access to the available data.
- [Chapter 3](#):  
Using an e-mail Client and Presence Management.

## 2 Data View

DS-Win is operated via the "Data view" window. This provides the user with an interface for entering and displaying phone book data.

### **Important**

In the following description of operating procedures it is assumed that the system is fully installed and ready for operation.

### 2.1 Starting DS-Win

Step	Action
1	Via "DS View" in the Start menu, open the application under Programs <b>DS-Win V4</b> . A connection to the license server as well as a valid license are prerequisites for this.

If the entries are correct, the "Data View" window is opened.

## 2.2 Settings

### 2.2.1 Application Settings

The first time you start DS-Win, **you will need to** make the following settings on the **Dial parameters** tab in the **Options/Application settings** menu in order to operate DS View.

The screenshot shows the 'Application settings' dialog box with the 'Dial parameters' tab selected. The dialog has a title bar with a close button (X) and a help icon. At the top, there are two fields: 'Default dialog form: designer\_en...' with a browse button (three dots) and 'Default language: en\_US' with a dropdown arrow. Below this is a tabbed interface with five tabs: 'Presence Management', 'BLF-WIN', 'License dialog', 'Dial parameters' (which is active), and 'AC-Win'. The 'Email Settings' tab is also visible. The 'Dial parameters' tab contains the following fields: 'Modem:' with a dropdown menu, 'Country code:', 'Area code:', 'Net code:', 'Tie number:', 'Trunk access:', 'National access:', and 'International access:', each with a text input field. At the bottom of the 'Dial parameters' section is a 'Domain list' with a large empty text area and a vertical scrollbar. At the very bottom of the dialog are three buttons: 'Ok', 'Cancel', and 'Help'.

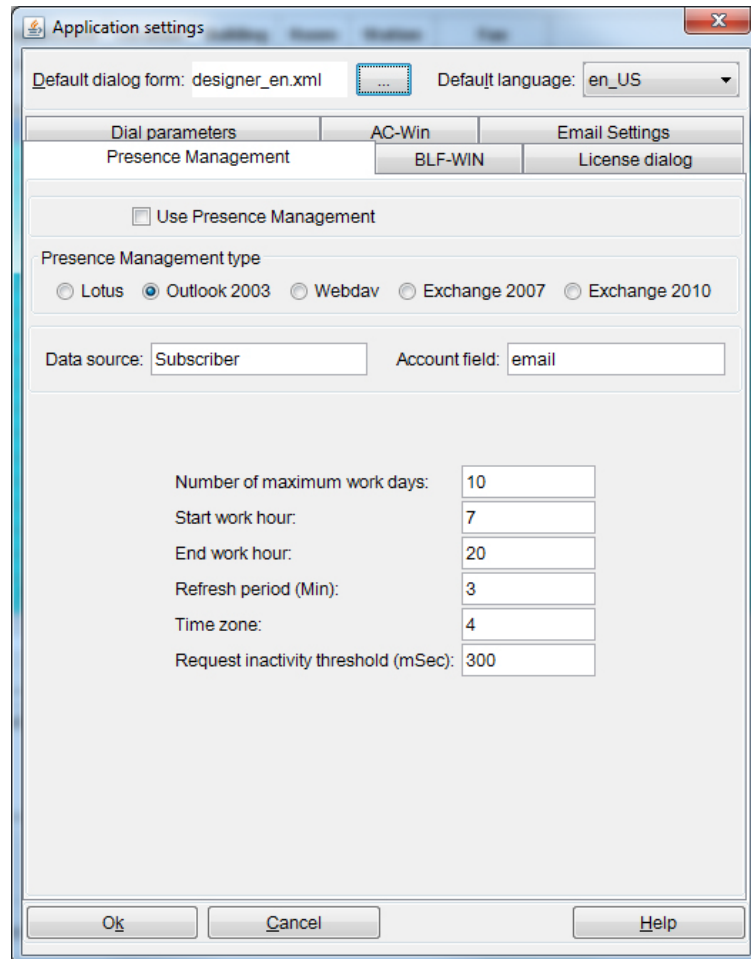
- Standard dialog form  
Select the dialog document for DS View. This form will be invoked the next time you start DS View.
- Default language  
Specifies the default language to be used the next time DS View starts.

The following settings under "Dial parameters" are for configuring automatic dialing.

- Modem  
This setting is only required if you are using DS-Win without AC-Win. Select the connection type from the drop-down list. The options are:
  - HDAUDIO SoftV92 Data Fax Modem
  - RAS Ppoe Line 0000
  - RAS-VPN-Line 0
  - WAN-Miniport (L2TP)
- Country code (required input)  
Enter your own country code here.
- Area code (required input)  
Enter your area code here.
- Net code (required input)  
Enter your net code here. For further information, consult your specialist staff.
- Tie number (required input)  
Enter your system's tie number here. For further information, consult your specialist staff.  
If your configuration uses tie numbers, it is very important that you enter them, since DS View can only process tie numbers if they are entered here.
- Trunk access (required input)  
If trunk access is used in your system, enter the code here. For further information, consult your specialist staff.
- National access code (required input)  
Enter an access code here for calls to the national network, e.g. 0.
- International access code (required input)  
Enter an access code here for calls to the international network, e.g. 00.
- Domain list  
Enter one or more domains.

## 2.2.2 DS-Win Presence Settings

Select the **Presence Management** tab under Application settings.



The Domino Server settings are only valid when Lotus Notes is used. If you use MS Outlook, these fields are inactive.

### Settings

- **Use Presence Management**  
This checkbox is not ticked. If you want to use presence management, tick this box. DS-Win has to be restarted for the on/off setting to take effect.
- **Presence Management type**  
This setting depends on whether you use Lotus, Outlook 2003, Webdav, Exchange 2007, or Exchange 2010. Only one option can be used.

- **Number of maximum work days**  
The search for appointments is limited by the value specified for the maximum number of work days.  
The following applies for Outlook: Work days are considered to be all days except Saturday and Sunday. Holidays are ignored.
- **Start work hour**  
The time when the work day starts. This value specifies the beginning of the daily interval in which appointments can be searched for.
- **End work hour**  
The time when the work day ends. This value specifies the end of the daily interval in which appointments can be searched for.
- **Refresh period (Min)**  
Update period for Outlook – The default is 3 minutes
- **Time zone**  
You will find further information in the Outlook documentation.
- **Request inactivity threshold (mSec)**  
This value is given in milliseconds. It specifies the amount of time until a new retrieval of appointment data when you change entries in the DS View data view.

### **Exchange Server 2010**

For Exchange Server 2010, the configuration is similar but not identical with the configuration of Exchange Server 2007. Via Exchange Web Services API (EWS), client applications communicate with the Exchange Server. The EWS provides access to most of the same data that is available by Microsoft Office Outlook.

The following settings are required for Presence Management in DS-Win:

- **enable on Exchange Server:**
  - Client Access role
  - Autodiscover Service
  - Availability Service
- **and configure the DS-Win client**

Testing the Exchange Server 2010 settings:

Because Outlook Web Access (OWA) also needs these services, configure OWA and test it. If OWA is enabled and works, DS-Win should also work.

## 2.2.3 AC-Win Settings

Choose the AC-Win tab under Application settings to access the AC-Win settings.

The screenshot shows the 'Application settings' dialog box with the 'AC-Win' tab selected. The dialog has a title bar with a close button. Below the title bar, there are two fields: 'Default dialog form: designer\_en...' and 'Default language: en\_US'. The main area is divided into several sections: 'Presence Management', 'BLF-WIN', and 'License dialog' are at the top. Below them are 'Dial parameters', 'AC-Win' (the active tab), and 'Email Settings'. The 'AC-Win' section contains two groups of radio buttons: 'Record selection originators' with options for 'Attendant intercept' (Caller, Destination) and 'Attendant recall' (Caller, Destination). Below this is the 'AC-Win Server' section with fields for 'IP number' (127.0.0.1), 'Port number' (54700), and 'Part of AC-Win window title' (ACCont). The 'Search parameters' section has fields for 'Grid name at int. call', 'Grid name at ext. call', 'Search field at int. call', 'Search field at ext. call', 'Tabsheet at int. call', 'Tabsheet at ext. call', 'Company', and 'Sortname'. The 'Key pressing' section has fields for 'Data source', 'Search field', and 'Search panel'. At the bottom of the dialog are 'Ok', 'Cancel', and 'Help' buttons, and a 'Dial properties' button is located above them.

### Record selection originators

- Attendant intercept  
Caller – Destination  
This parameter regulates which record is selected following a normal attendant intercept: caller or destination
- Attendant recall  
Caller – Destination  
This parameter regulates which record is selected for a recall.

### **AC-Win Server**

- IP number  
This parameter is stored in the DSWin\_View\_config.xml configuration file.
- Port number  
The default setting for the port is 54700. This parameter is stored in the configuration file DSWin\_View\_config.xml.
- Part of AC-Win window title  
The AC-Win title is stored in the DSWin\_View\_config.xml configuration file. The first characters show suffice (case sensitive)

### **Search parameters**

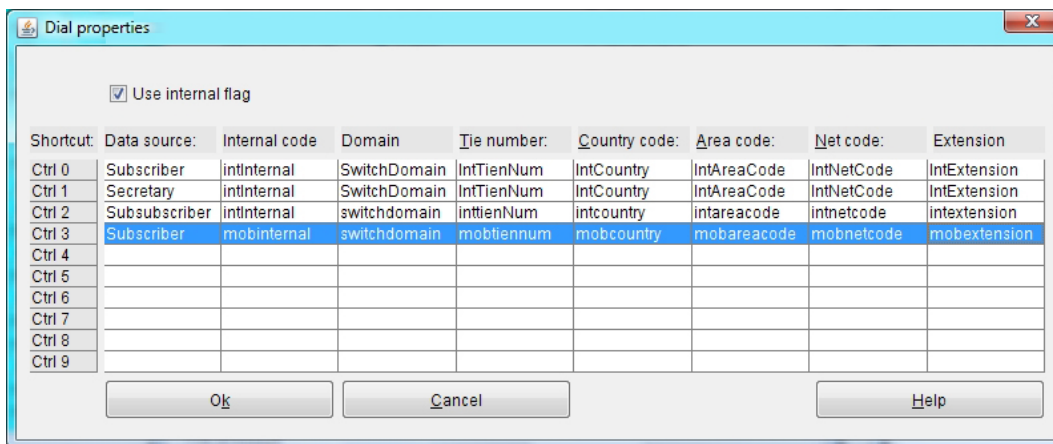
- Grid name at int. call:  
Grid1 should be set here for reasons of backward compatibility. The AC-Win query is performed in the first table.
- Grid name at ext. call  
Grid1 should be set here for reasons of backward compatibility. The AC-Win query is performed in the first table.
- Search field at int. call  
Database field name in the subscriber table (controls the choice of data record in the event of a query from AC-Win. TielnvertedNumber should remain set here for reasons of backward compatibility.
- Search field at ext. call  
Database field name in the subscriber table (controls the choice of data record in the event of a query by AC-Win. InvertedNumber should remain set here for reasons of backward compatibility.
- Tabsheet at int. call  
The default setting is 0. This parameter determines which tab should be selected in the event of a query from AC-Win. Possible values are 0 to 3.
- Tabsheet at ext. call  
The default setting is 0. This parameter determines which tab should be selected in the event of a query from AC-Win. Possible values are 0 to 3.
- Company  
Contains the field name of the subscriber table for the values returned to AC-Win. The default setting is company.
- Sortname  
Contains the field name of the subscriber table for the values returned to AC-Win if "automatic name retrieval" is set in AC-Win.

### **Key pressing**

- Data source  
When a key is pressed in AC-Win, DS-Win searches for this data source.

## Data View Settings

- **Subscriber**: Default setting if a PostgreSQL database is used.
- **MS SQL Subs**: Setting if an MS SQL database is used.
- Search field  
When a key is pressed in AC-Win, DS-Win searches for this field in the data source.
- Search panel  
When a key is pressed in AC-Win, the characters are displayed in the search panel in DS View.
- Dial properties  
If you click this button, the following dialog is displayed with fields from the subscriber table:



You can determine in this table which button dials which station number. Note the call parameters in the GUI Designer for ActionType = PHONECALL in this regard. The CallNumber parameter 0 to 9 corresponds in this case to the table row.

The following values contain database field names, whereby it should be noted that input is case sensitive:

- Use internal flag
- Data source
- Internal code
- Domain
- Tie number
- Country code
- Area code
- Net code
- Extension

Confirm input in each dialogue window by clicking **OK**.

If an MS SQL database is used, the table has to be filled as follows:

- "Ctrl 0": MS SQL Subs
- "Ctrl 1": MS SQL Secur
- "Ctrl 2": MS SQL SubSubscriber
- "Ctrl 3": MS SQL Subs

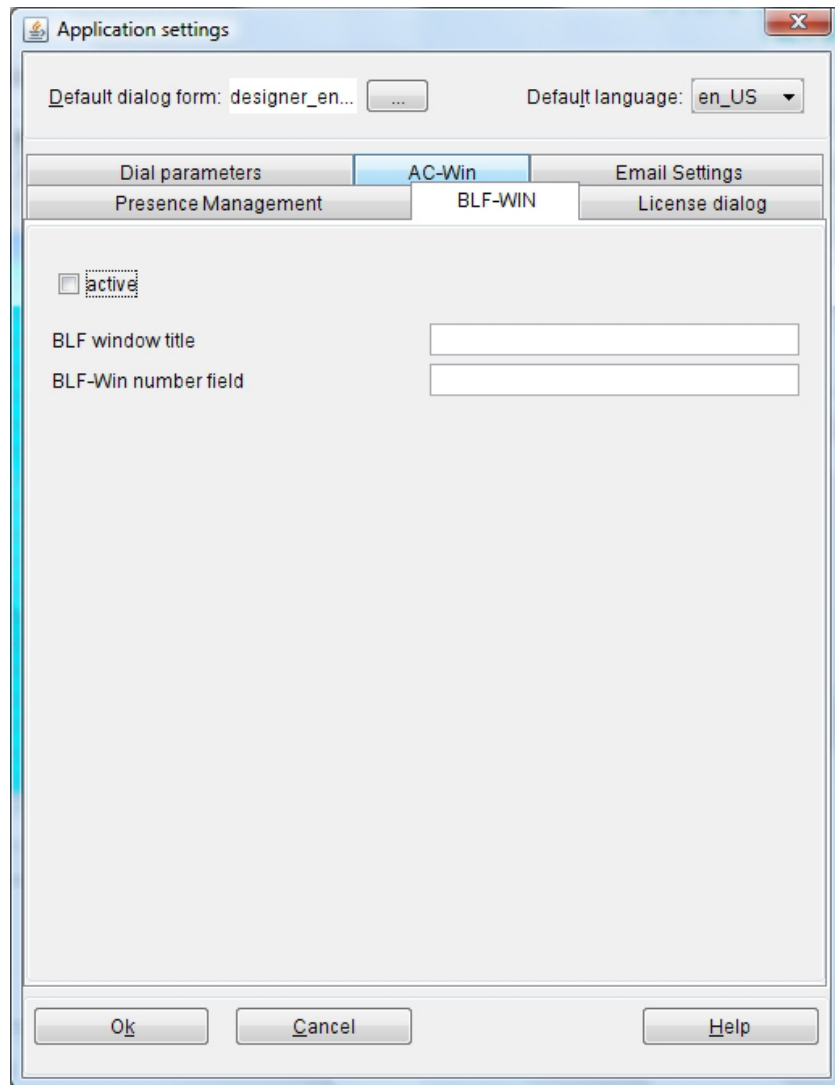
---

**NOTE:** The "Ctrl 0" value is assigned with the "CallNumber" property of the GUI Designer.

---

## 2.2.4 BLF-Win Settings

Choose the BLF-Win tab under Application settings to access the BLF-Win settings.



- **Active**  
This setting should only be enabled if BLF is installed on the same computer as DS-Win.
- **BLF window title**  
Part of BLF window title. Only the first pair of significant characters are important (case sensitive) for identifying the window.
- **BLF-Win number field**  
Corresponds to the field name of the Station field in the subscriber table. Please use the default settings for reasons of backward compatibility.

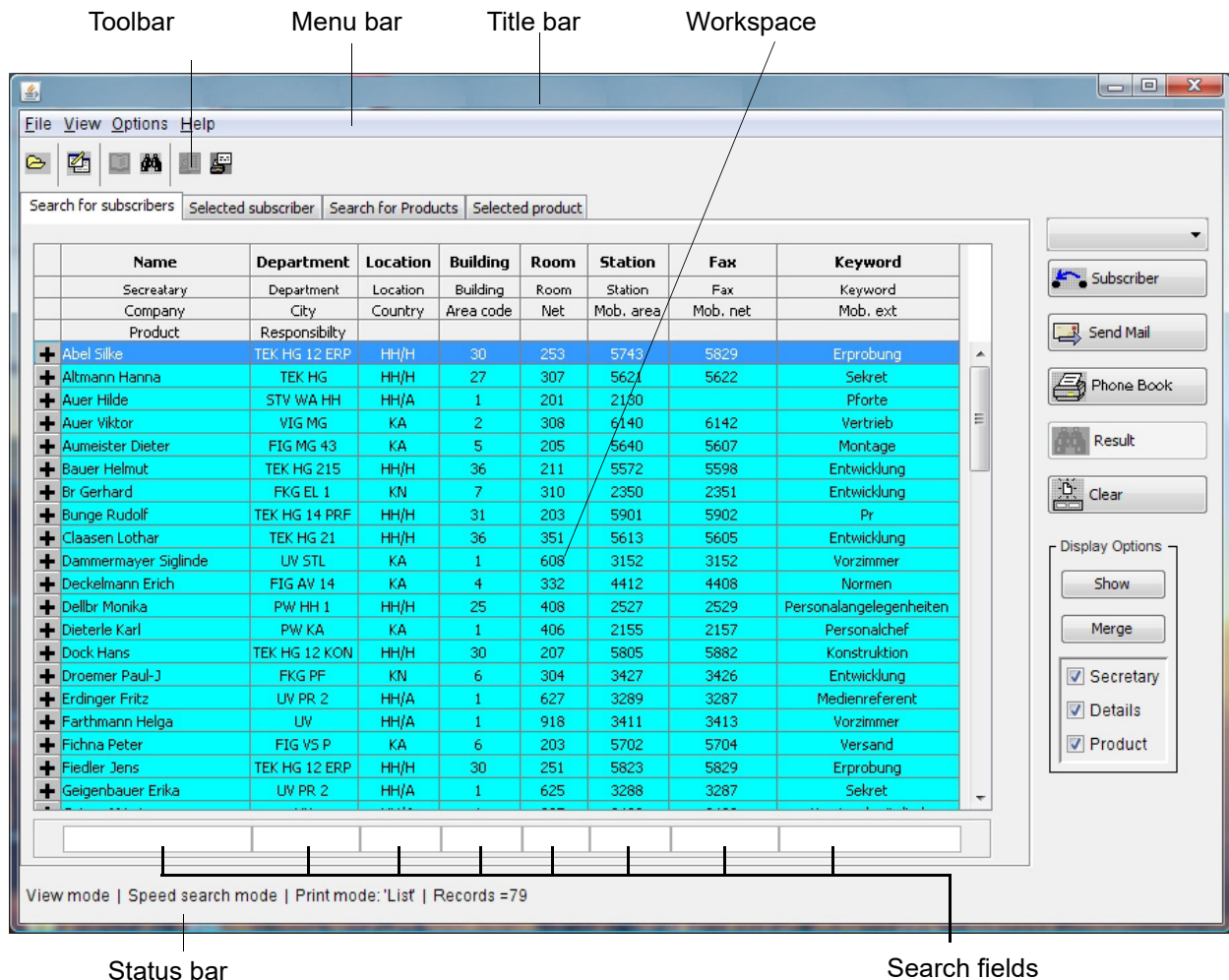
## 2.3 The Standard Screen

The window illustrated shows the configuration supplied with the software package. It may look different in your application if it has been adapted to the requirements of your company by the system administrator.

Please note that the size of the window should only be adjusted using the "GUI Designer" program. If you enlarge or reduce the size of the window while DS View is running, it may happen that components are not enlarged or reduced automatically at the same time and therefore may not be visible.

You can select the DS-Win functions in the standard screen using icons and menus. The icons in the toolbar enable you to structure the data view on the screen. The menu items that appear when you click on them are self-explanatory.

If you drag the cursor onto the fields in the menu bar or toolbar, the relevant functions will be displayed. When you do this for the first time it may be necessary to click on them to make the functions visible.



## Data View

### The Standard Screen

The large screen area is your workspace which is terminated at the bottom by the status bar. The workspace can be configured individually and may therefore differ in appearance from one installation to another. The workspace is where you make your entries and results are displayed. Messages and information about completed program steps and the status in different modes are displayed in the status bar.

The system is controlled via the menu bar.

### File View Options Help

When you click on the titles above, the following sub-menus are opened:

#### File menu

- The "File" menu is required for opening DS-Win applications that can be used alternatively.
- If you click on **Open**, the DS-WIN applications contained in the current directory are displayed. Double click on the application you require.

#### View menu

- You can use the "View" menu to activate or deactivate the status bar and toolbar.

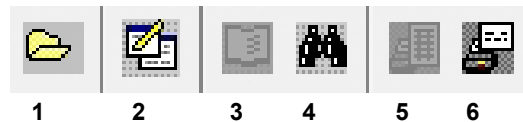
#### Options menu

- The "Options" menu provides you with additional functions: It enables you to select a search procedure and various print options, to configure the application and set the language. You can make changes to data records by clicking on Edit.

#### Help menu

- By clicking on **Help**, you can access the online help.

You can also call up some of these dialogs directly from the toolbar underneath:



From left to right:

If you	then
(1) Open a dialog file	you look for your file and place it in the workspace.
(2) Select edit mode	you switch modes (view or input mode).
(3) Activate a speed search	you switch to a search using a character string.
(4) Activate a result search	you switch to a search using defined terms.
(5) Set print mode to "List"	you print the displayed data in list form (phone book).
(6) Set print mode to "Record"	you print a single record.

The buttons in the workspace make it easier for you to use important DS-Win functions. The layout of the buttons depends on your individual settings and may differ from the layout depicted here.



If you click	then
Subscriber Secretary ...	you call the selected subscriber via their phone number. You can dial additional phone numbers using other configured buttons (for example secretary, mobile telephone). <b>Note:</b> If additional phone numbers are configured, you can dial them using the key combinations Ctrl-1... Ctrl-9. Refer also here to the "Dial parameters" dialog, which you can access via the "AC-Win" tab with the "Dial parameters" button. The CallNumber parameters for the "Action Type=PHONECALL" button, which are defined in the GUI Designer, also take effect here.
Phone book/ Record	you print either all displayed records (phone book) or only the record that is marked at the moment.
Result	you start a result search.
Clear	you delete all entries in the search fields.

## 2.4 Searching for Data

You can choose between two search methods:

- Result search
- Speed search

You can set the search mode via:

- Options
- the toolbar
- function keys (F5 for speed search, F6 for result search)

F5 for speed search



F6 for result search



Click with the mouse to activate the search mode you want. This will then be active in the following search procedure.

### 2.4.1 Speed Search (F5) and Automatic Dialing

With the speed search, the characters in the search term are entered in successive order in only one field; the system immediately directs you to the record that best matches your entry.

The records are sorted according to the column in which you are searching. If you enter a search string in the search field of another column, data is sorted according to this column before the search task is initiated.

As soon as the correct entry is found, the connection can be set up by pressing the Station key (subscriber or secretary). You can reach alternative numbers via other buttons if configured, and using the key combinations "Ctrl-1 ... Ctrl-9".

## 2.4.2 Result Search (F6)

Select this method to look for linked search criteria, e. g. according to name and department simultaneously. After entering the search criteria in the search fields, you can start the search process by clicking the "Search" button or by pressing **F3**.

The result you receive from this search will be the set of records corresponding to the criteria entered.

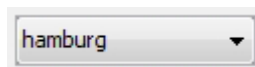
You can search with or without a wildcard. With wildcards, you can either extend or restrict search criteria as required:

If you use the wildcard	the system replaces
?	any individual character. Example: With "MA?OR" all values are searched which start with "Ma", end with "or" and also contain additional letters in the middle, for example "Major", "Mayor", "Manor", etc.
[..., ...]	only characters between brackets. Example: With MA[N,J,Y]OR, only "MAYOR", "MAJOR" and "MANOR" are searched.
[...- ...]	only characters between brackets. Example: 0-9 means all characters.

You should note that when using other databases, other wildcards may be required.

## 2.5 Pre-Selecting Areas

If your data is divided into various areas, you can use the combination box in the upper right margin to preselect records. To do this, open the list of available areas and mark the corresponding entry. Only records from this area are now displayed.



## Data View

Viewing Search Results

## 2.6 Viewing Search Results

After completing a search, the result is displayed on the screen in edited form. You can change the display to show detailed data (see Section 2.6.1 on page 2-24) and you can also print out the results (see Section 2.6.4 on page 2-29).

### 2.6.1 Displaying Detailed Data

You have the option of displaying detailed data both on the "Search for subscribers" tab and on the "Selected subscriber" tab.

#### 2.6.1.1 »Search for subscribers« Tab

Name	Department	Location	Building	Room	Station	Fax	Keyword
Secretary	Department	Location	Building	Room	Station	Fax	Keyword
Company	City	Country	Area code	Net	Mob. area	Mob. net	Mob. ext
Product	Responsibility						
+ Abel Silke	TEK HG 12 ERP	HH/H	30	253	5743	5829	Erprobung
+ Altmann Hanna	TEK HG	HH/H	27	307	5621	5622	Sekret
+ Auer Hilde	STV WA HH	HH/A	1	201	2130		Pforte
+ Auer Viktor	VIG MG	KA	2	308	6140	6142	Vertrieb
+ Aumeister Dieter	FIG MG 43	KA	5	205	5640	5607	Montage
+ Bauer Helmut	TEK HG 215	HH/H	36	211	5572	5598	Entwicklung
+ Br Gerhard	FKG EL 1	KN	7	310	2350	2351	Entwicklung
+ Bunge Rudolf	TEK HG 14 PRF	HH/H	31	203	5901	5902	Pr
+ Claasen Lothar	TEK HG 21	HH/H	36	351	5613	5605	Entwicklung
+ Dammernayer Siglinde	UV STL	KA	1	608	3152	3152	Vorzimmer
+ Deckelmann Erich	FIG AV 14	KA	4	332	4412	4408	Normen
+ Dellbr Monika	PW HH 1	HH/H	25	408	2527	2529	Personalangelegenheiten
+ Dieterle Karl	PW KA	KA	1	406	2155	2157	Personalchef
+ Dock Hans	TEK HG 12 KON	HH/H	30	207	5805	5882	Konstruktion
+ Droemer Paul-J	FKG PF	KN	6	304	3427	3426	Entwicklung
+ Erdinger Fritz	UV PR 2	HH/A	1	627	3289	3287	Medienreferent
+ Farthmann Helga	UV	HH/A	1	918	3411	3413	Vorzimmer
+ Fichna Peter	FIG VS P	KA	6	203	5702	5704	Versand
+ Fiedler Jens	TEK HG 12 ERP	HH/H	30	251	5823	5829	Erprobung
+ Geigenbauer Erika	UV PR 2	HH/A	1	625	3288	3287	Sekret

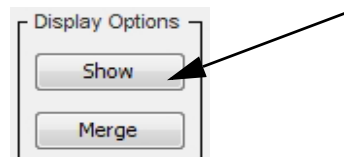
You can display detailed data in the result table. If the first column for a record displays the **+** icon, you can simply double-click on this icon to display additional data in sub-rows.

+	Auer Hilde	STV WA HH
+	Auer Viktor	VIG MG
+	Aumeister Dieter	FIG MG 43
+	Auer Hilde	STV WA HH
-	Auer Viktor	VIG MG
👤	Geiger AG	Karlsruhe
🏭	Electrostar100	Produktmanager
🏭	Electrostar200	Produktmanager
+	Aumeister Dieter	FIG MG 43

The sub-rows can be selected using the CTRL+Arrow UP or CTRL+Arrow Down key combinations.

### Show All

If you want to show all displayed records in this way, click on the "Show" button.



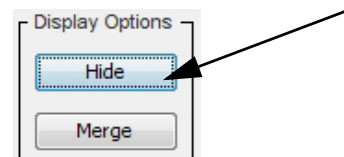
### Hide Detailed Data



The detailed data of an individual record is hidden.

### Hide All

If you want to hide the detailed data of all displayed records click on the "Hide" button.



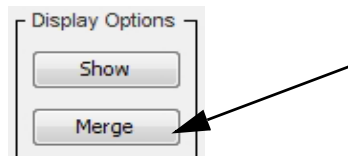
### Merging a Display

A display containing several records of the same type can often be very confusing, especially if the contents in the individual fields are similar.

In order to structure a display of this kind click on the "Merge" button. The structured display is not shown. If you first displayed the detailed data, the detailed data is hidden automatically for the structured display.

## Data View

### Viewing Search Results



Cells that are horizontally and vertically adjacent and that contain the same information will be displayed by DS-Win as a single large cell, which increases clarity considerably.

There are several ways of moving about the table

- by clicking the arrow keys to scroll up and down in the list
- by dragging the slide tab to scroll to the upper or lower section
- by using the cursor keys to access other data records in the table – the current data record is darkened.

### 2.6.1.2 »Selected subscriber« Tab

You can use the "Selected subscriber" tab to switch to form display for the record currently marked. This display is also required for editing individual records.

The screenshot shows a software window titled "Selected subscriber" with a menu bar (File, View, Options, Help) and a toolbar. Below the toolbar are four tabs: "Search for subscribers", "Selected subscriber" (active), "Search for Products", and "Selected product".

The main form area is divided into several sections:

- Subscriber:** Name: Auer, Title: , First name: Hilde, Salutation: Fr., Sortname: AUER HILDE
- Organization:** Department: STV WA HH, Company: Geiger AG, City: Hamburg
- Address:** Location: HH/A, Building: 1, Room: 201, Address: (dropdown)
- Keywords:** Pforte
- eMail address:** (empty field)
- Secretary:** Name: (dropdown)
- Info:** (blacked out area)
- Stations:** A table with columns: Country, Area code, Net code, Tie number, Extension, Internal station.
 

	Country	Area code	Net code	Tie number	Extension	Internal station
Internal:	49	40	2298	92	2130	<input checked="" type="checkbox"/>
Alternate:	49	40	2298	92	2135	<input checked="" type="checkbox"/>
Mobile:						<input type="checkbox"/>
Fax:						<input type="checkbox"/>

On the right side, there is a vertical toolbar with buttons: Subscriber, Secretary, Record, First, Previous, Next, Last. At the bottom of the window, it says "View mode | Speed search mode | Print mode: 'Record' |".

There are several ways of switching the current data record. You can use the following buttons to do this:

- **First** for the first record in the table
- **Previous** for the previous record
- **Next** for the next record
- **Last** for the last record in the table

## 2.6.2 Altering Sort Settings

You can easily modify sorting for your search result.

Step	Action
1	Click on the title of the column according to which sorting is to be performed. Result: The table is resorted accordingly.

The value of the field on which sorting is based is imported to the search field. This simplifies searching in this column because the term which has already been found does not need to be entered again.

### Examples:

A specific subscriber was searched for, however no connection was possible as the subscriber was unavailable. The caller asks to be connected with another subscriber in the same room. In this case, simply click on the column "Room" to immediately display all subscribers in the room where the originally requested call partner is located. You can now select a new subscriber.

Because a connection could not be set up with the first subscriber searched for, the caller asks you to connect him to the supervisor of the relevant department. If departmental names are classified hierarchically, the supervisor's departmental name contains either one letter or one digit fewer. Click on the "Department" column and then press the backspace key to delete the last characters of the term contained in the search field. This branches you back to the higher hierarchy levels where the other station required can be found.

## 2.6.3 Deleting Search Criteria

If you have entered several search criteria for the result search, you do not need to delete each search field individually before a new search. Simply use the corresponding accelerator.

Step	Action
1	Press the key combination Ctrl + Del. Result: The contents of the search fields are deleted.

## 2.6.4 Printing Results

You have the option of printing

- a single record or
- the complete list of all records (phone book).

To do this, activate either Print List or Print Form in the toolbar.




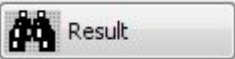


Depending on the switch setting you have selected, either the *Phone Book* or *Record* button will be displayed clearly for selection.

All available print forms are displayed in the "Options" menu under "Print form". You can click to select a print form.

In the print mode "List" the records are printed in the same order as displayed in the output table. If you switch to the result search before printing, you can conveniently define record selection and sorting. Record selection is defined by specifying search criteria in the search panel. All fields completed in the search panel are used for sorting. The search field to the furthest left is the main sort criterion. All other completed search fields are included in sequence in the sort criterion.

### Example:

You would like to print a list sorted according to location, and within the location according to department, and then according to name.

Step	Input	Action
1		Switch to the result search.
2	Text	Enter the required search criteria in the search fields "Location", "Department" and "Name". You can also only use the first characters of a search term.
3		Press the "Result" button on the right side of the main window.
4		Switch to the print mode "List" and select a print form.
5		Press the button "Phone Book" on the right side of the main window. The records are now printed in the required order.

## 2.7 Editing Records



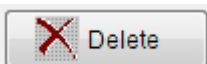


The Data view window allows you to edit individual records directly, providing you have the appropriate access authorization to the database. Switch to the Selected subscriber tab because it is **only** possible to edit data records in form fields and **not** in the list view.

You can switch from display mode to input mode as follows:

- By choosing the Edit menu option in the Options menu or
- By clicking the "Input mode" icon or
- Using the F2 key
- Other buttons appear on the right-hand side of the workspace.
- You have already selected a record. To edit the current record, you have to click in an editable field. The buttons on the right side are then activated.

When the database is edited with another program, the modifications will be visible after the table page is reloaded in the list view. The table page can be reloaded by selecting an entry from the list and pressing the CTRL+R key combination.

### 2.7.1 Editing Records with the Control Buttons

When you click the ... button	then
 Modify	you save the changes in the current record.
 Discard	you discard changes.
 Delete	you remove the current record from the database.
 Add	you insert the new record in the database.
 New	you create a new record.

## 2.7.2 Editing Combination Boxes with the Keyboard

Text is not entered directly in combination boxes, rather it is selected from a list of possible values and then transferred to the field. These fields can be edited both with the mouse and the keyboard. If the cursor is located in a combination box (field content is selected), the following accelerators are available.

**Requirement:** The combination boxes were preconfigured in the GUI Designer.

Using the key or key combination	you can
Alt + Down arrow	display the possible values in a drop-down list.
UP, DOWN	scroll line-by-line through the list.
PgUp, PgDn	scroll page-by-page through the list.
Shift + Enter	accept the selected value in the combination box.
Del	delete the value in the combination box.

## 2.8 Opening an Existing Database in DS View

When DS-Win is started, a database containing the last settings saved appears automatically. You can open a different database via the File > Open menu.

## **Data View**

Opening an Existing Database in DS View

## 3 E-Mail Client and Presence Management

### 3.1 E-Mail Client

#### 3.1.1 Features

DS-Win V4 supports the following e-mail formats:

##### **SMTP Server**

The e-mails are transferred to an available SMTP server in the network. This server is responsible for delivering the e-mails to the addressees.

##### **SMTP Relay**

The e-mails bypass the SMTP server and are sent directly to the address domain's e-mail server. To find this domain's mail server, there must be a DNS in the LAN and it must be possible to reach the destination computer in the e-mail address via this DNS.

##### **MAPI**

If an Outlook client is being operated on a DS-Win desktop, which supports the MAPI protocol, then both the interface of the Outlook client and the interface of the DS-Win e-mail client can be used. The e-mail address can be transferred automatically from the DS-Win database in this case also.

##### **Outlook OLE**

An existing MS Outlook must be started (**not** Express) and is used via the OLE interface.

E-mail messages are only sent in this mode - none are received. When using the SMTP modes, it is also technically impossible to receive e-mails.

##### **Automatic Transfer of e-mail Address to the e-mail Client.**

A database field can be programmed freely so that the e-mail address is automatically transferred to the DS-Win e-mail client.

##### **Standard texts for both the Subject Line and the Message**

Standard texts for all languages released are supplied in the *Message.doc* file and can be customized.

This **Message.doc** file and samples of standard texts can be found after installation in the DS-Win directory "ProgramData\Unify\DS-Win V4\SendMail\".

Three different standard texts can be accessed in the e-mail client via buttons. The names of these buttons are freely programmable.

The message is displayed in RTF format (Rich Text Format) which supports the use of a range of fonts, styles and colors to make layout clearer.

The text can be edited directly in the e-mail client. The range of RTF formatting

## **E-Mail Client and Presence Management**

### **E-Mail Client**

options available here is limited (e.g. no Color selection). WordPad is available in the e-mail client menu and offers a better selection of RTF formatting options for editing messages. The actual text displayed in the e-mail client is then automatically transferred to WordPad. The changes made are immediately displayed in the e-mail client once you have saved and quit WordPad.

#### **Adaptation of Customer-specific Dialogs for DS-Win Data View with the e-mail Client**

You can use the Designer to modify existing DS-Win data view custom dialogs for use with the e-mail client. The section entitled Configuration of the E-Mail Client contains instructions on this.

## 3.2 Configuration of the E-Mail Client

### 3.2.1 Prerequisites

The *DS-Win e-mail client* can be used by the attendant staff to send an e-mail informing absent/busy subscribers about a call.

There is no need to reply to this e-mail and consequently the system is not designed to receive e-mails (to avoid involving another host (POP3)).

The client therefore only supports the **SMTP** protocol (not POP3) for sending e-mails.

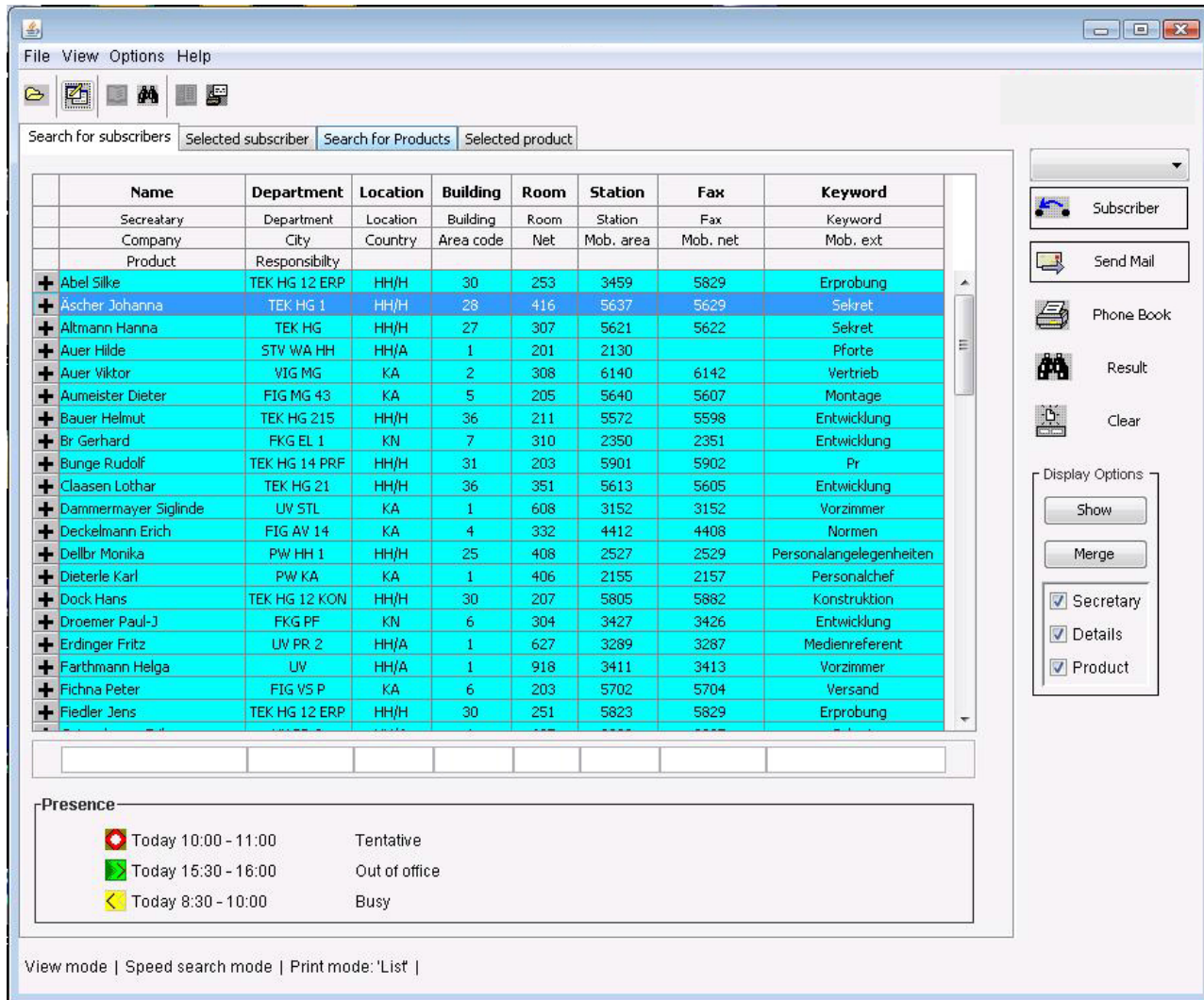
**The network therefore must feature an SMTP host or a DNS (Domain Name System) when using SMTP Relay.**

If you want to receive e-mails, an e-mail program that supports the **MAPI** protocol (e.g. MS Outlook) must be installed on the DS-Win workstation.

The *DS-Win e-mail client* can retrieve the e-mail address of the subscriber to be notified from the database. This is supported for SMTP/MAPI/OLE.

### 3.2.2 Customizing Customer-Specific Dialogs / Configuring a Button for E-Mail

For default installation, the supplied configuration files "<INST DIR >data\forms\designer\_de.xml" or "<DSWIN INSTALLDIR dir>\data\forms\designer\_en.xml" already provide preset e-mail configuration data.



The e-mail function must be manually configured if customer-specific modifications have already been performed in DS-Win. To do this, please refer to the instructions that describe how to program the button with the e-mail function in DS-Win and how the database field can be displayed with the e-mail address in DS-Win.

To enable the sending of an e-mail, a *button* must be programmed with the *Send Mail* function and a name (in this case: *Send Mail*) assigned.

Precise configuration details can be found in the Designer manual in the Chapter "e-mail Client Dialog Configuration".

### 3.2.3 E-Mail Settings

Before you can send e-mails, a number of modifications must be performed on opening the "Email Settings" tab in the Application settings dialog for the first time.

Open the Application settings menu from the options and select the "Email Settings" tab.

The screenshot shows the "Application settings" dialog box with the "Email Settings" tab selected. The dialog is titled "Application settings" and has a close button (X) in the top right corner. At the top, there are two fields: "Default dialog form: designer\_en..." and "Default language: en\_US". Below these are three tabs: "Presence Management", "BLF-WIN", and "License dialog". Under "Presence Management", there are three sub-tabs: "Dial parameters", "AC-Win", and "Email Settings". The "Email Settings" tab is active and contains the following sections:

- Email type:** Four radio buttons: "SMTP Server", "SMTP Relay", "MAPI", and "Outlook/OLE". "Outlook/OLE" is selected.
- Defaults:** Two checkboxes: "Subject" (checked) and "Message" (unchecked).
- Sender:** Text field containing "firstname.lastname@siemens.com".
- BCC:** Text field containing "firstname.lastname@siemens.com".
- SMTP Server:** A group of five text fields: "Hostname" (192.168.1.26), "Port" (25), "UserID", "Password", and "Timeout (ms)" (6000).
- SMTP Relay:** A text field for "Domain (e.g. X.Z.com)".
- Interface:** Two radio buttons: "DSWin Email User Interface" and "MAPI/Outlook Email User Interface". "MAPI/Outlook Email User Interface" is selected.
- Data source:** Text field.
- eMail field:** Text field.

At the bottom of the dialog are three buttons: "Ok", "Cancel", and "Help".

## E-Mail Client and Presence Management

### Configuration of the E-Mail Client

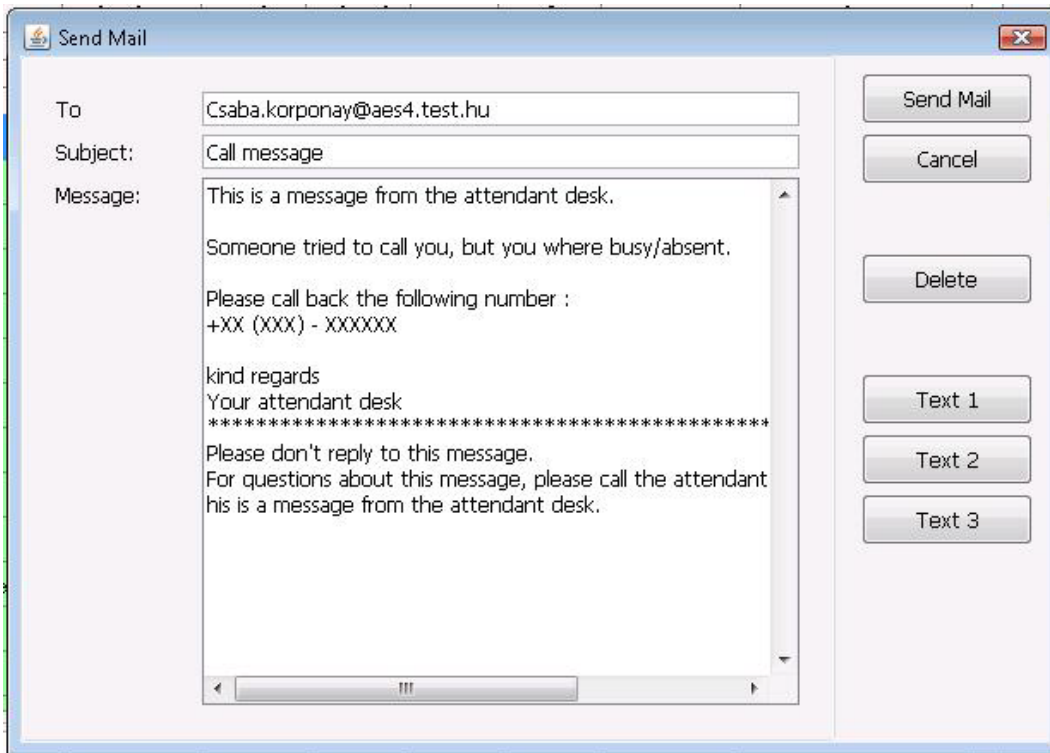
If a checkmark is set for *Subject* and *Message* under *Defaults*, then the current texts entered in these two fields in the eMail dialog are saved as standard Text1. Every time the **Send Mail** button is now pressed, these texts will be displayed under *Subject* or *Message*.

7

#### WARNING

The changeover to the MAPI/Outlook e-mail User Interface is permanent but is configured in DSWin\_view\_config.xml. See [Section 3.2.3.5, "MAPI/Outlook E-mail User Interface"](#), on page 41.

The following dialog will appear after selecting a subscriber and pressing the **Send Mail** button:



Please note that the caller's telephone number cannot be inserted correctly if the wildcard for the telephone number (+XX (XXX) XXXX) was deleted. In this case, 1234 is added after "Caller Number:"!!!

Comment: The wildcard XX [XXX} XXXX itself can be defined by qualified personnel in the message files Message1.txt or Messag2.txt in the DS-Win directory "ProgramData\Unify\DS-Win V4\SendMail":

For example change to. +XX[XXX] - XXXXXX:

The wildcard parameter can also be changed in the file "C:\ProgramData\Unify\Ds-Win V4\config\DSWin\_View\_config.xml". Should you change it, please make sure that the value in the configuration file is identical to the value in the "Message.txt" file.

Comment: The telephone number is not inserted if this entry contains fewer than two characters. The number of the incoming call is available as soon as "Send Mail" is pressed and replaces the wildcard.

The mail texts are saved in the files *Message1-3.txt* in the DS-Win directory **C:\ProgramData\Unify\DS-Win V4\SendMAil**. Three different standard texts can be selected for the message with the buttons *Text 1-3*. The standard text displayed can be temporarily deleted by pressing *Delete* to send an e-mail with a different text.

### 3.2.3.1 E-Mail Type

The e-mail transfer method can be defined with "Email type".

### 3.2.3.2 Defaults

Specify whether the **Subject** line is to be used.

To send an e-mail, the sender's e-mail address must be entered in the **Sender** field (in this case the attendant console). This entry is used as the sender in the e-mail so that the e-mail recipient can see who sent the message. This entry must not be a real e-mail address, but Microsoft naming conventions must be observed.

An e-mail address can be entered in the **BCC** field (optional) to which a copy of every e-mail is to be sent by default. This must not be used and is only provided here for information purposes showing who the e-mail was sent to, when it was sent and what the contents were.

#### 3.2.3.3 SMTP Server

The screenshot shows the 'Application settings' dialog box with the 'Email Settings' tab selected. The 'Email type' section has 'Outlook/OLE' selected. The 'Defaults' section has 'Subject' checked. The 'Sender' and 'BCC' fields both contain 'firstname.lastname@siemens.com'. The 'SMTP Server' section has 'Hostname' set to '192.168.1.26', 'Port' set to '25', 'UserID' and 'Password' fields are empty, and 'Timeout (ms)' is set to '6000'. The 'SMTP Relay' section has 'Domain (e.g. X.Z.com):' empty. The 'Email User Interface' section has 'MAPI/Outlook Email User Interface' selected. The 'Data source' and 'eMail field' fields are empty. The 'Ok', 'Cancel', and 'Help' buttons are at the bottom.

The name or the IP address of the SMTP host on the network is entered in the **Hostname** field (if necessary, consult your network/SMTP host administrator).

The default **Port** need not normally be modified.

Whether or not the **UserID** has a significance depends on the configuration of the SMTP host. **This field must not be left blank however.** Although SMTP hosts frequently overlook this UserID, an entry must always be present. Please check with the SMTP host administrator to see if a random text (for example "default", "attendant") or a particular user login is necessary. The **Password** only has to be entered here if the SMTP server also expects a password for UserID. The **Timeout** parameter specifies how long the system waits for a DNS response when sending a message before aborting the send attempt.

#### 3.2.3.4 SMTP Relay

*SMTP Relay* mode can also be used here if the SMTP host is not known or if there is no special SMTP server available. In this case, the **DNS** (Domain Name Server) is used to determine the receiving mail server for every e-mail address, and the mail is sent directly to this server. (A task that is normally performed by an SMTP server.) **For this to work, it must be possible to reach the destination computer specified in the e-mail address via this DNS.** The IP address of the DNS can be determined in the *DOS box* with the command *IPCONFIG /ALL*. Whether or not this mode works within the network depends on the configuration of the DNS and the e-mail server.

#### 3.2.3.5 MAPI/Outlook E-mail User Interface

The **MAPI** setting facilitates the use of external e-mail programs that support the MAPI interface (for example Outlook). In this mode, the current mail settings of the external software are applied (User name, Server etc.).

#### 3.2.3.6 Outlook/OLE

This setting can only be used if an Outlook client is installed on the DS-Win PC. Outlook is then addressed directly via the OLE interface. This may be faster than via the MAPI interface. A choice of user interface is also available here (see under MAPI).

### 3.3 Presence Management for DS-Win V4

#### 3.3.1 Description of DS-Win Presence Management

This new function does not affect the traditional DS-Win attendant console functions or the interworking with external OpenScope applications (AC-Win, BLF).

**Presence Management** for DS-Win can run with Microsoft Outlook 2003/2007, with Exchange Server 2003 as well as Lotus Domino R8 / Lotus Notes R8.

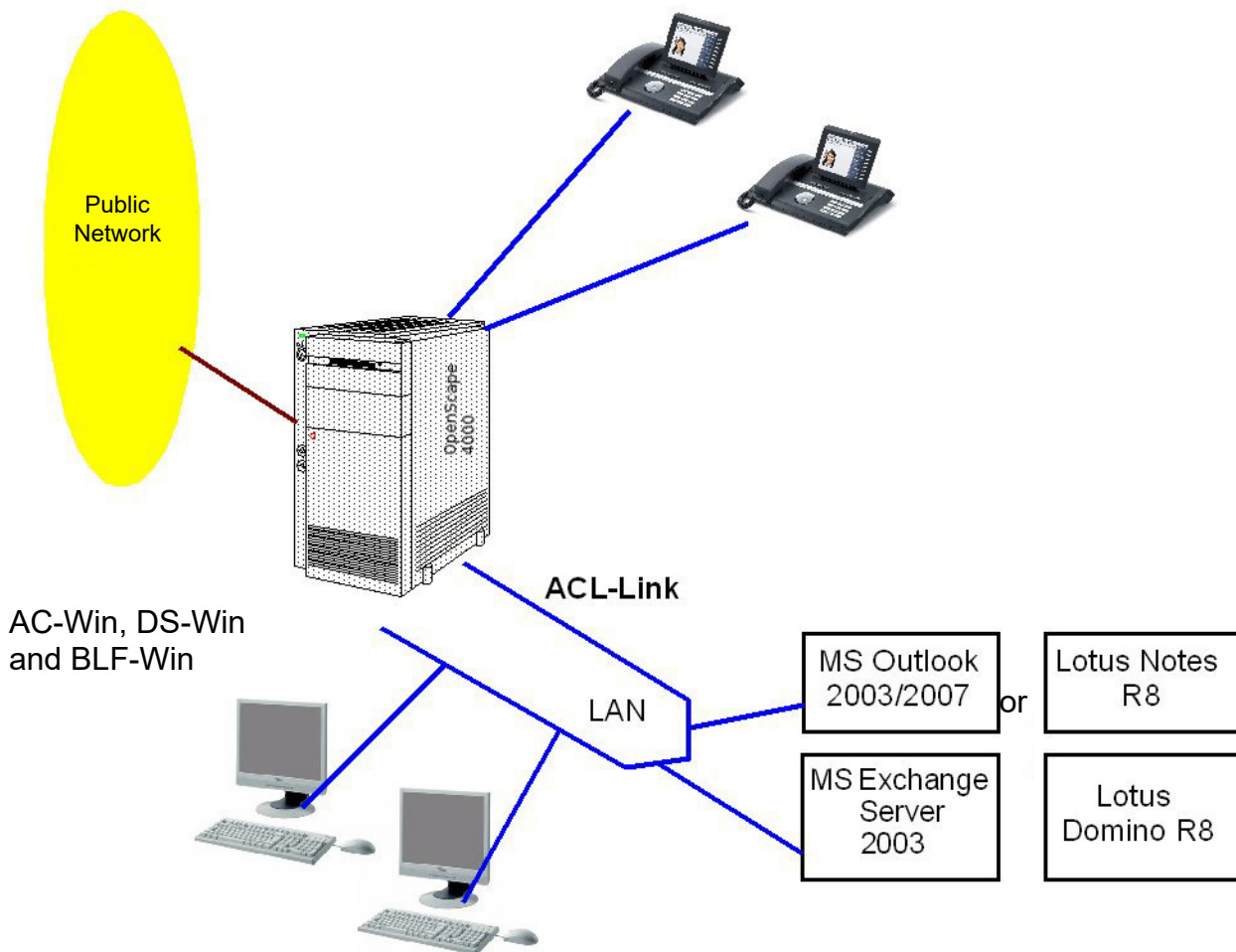


Figure 2 Overview of OpenScope Applications

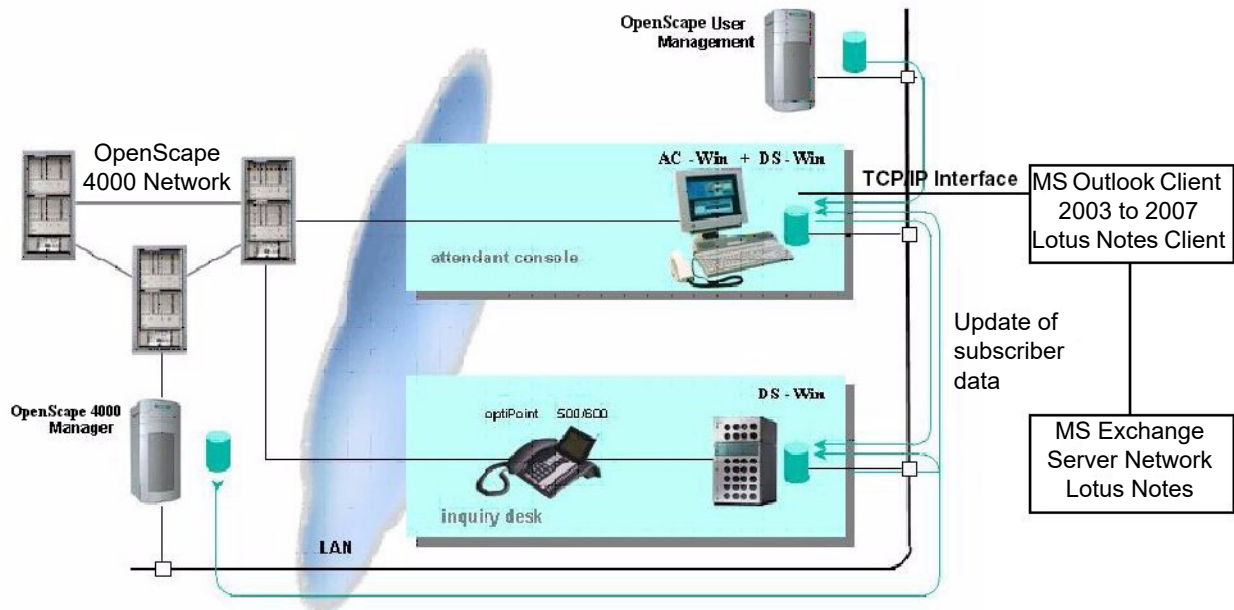


Figure 3 DS-Win V4 Configuration Overview

### 3.3.2 Configuration Requirements

Microsoft Outlook 2007 must be installed on the same PC as DS-Win.

First activate presence management and set the requisite parameters (see [Section 2.2.2, "DS-Win Presence Settings", on page 4](#)).

#### 3.3.2.1 Outlook

Since calendar data for MS Exchange Server (2003) is accessed with Outlook 2007, a mailbox for Outlook should be configured on the mail server (MS Exchange). If the Exchange server is integrated in a network and synchronization between the individual servers is configured, then data retrieval is possible throughout the net.

### 3.3.3 Description of the »Presence« Window

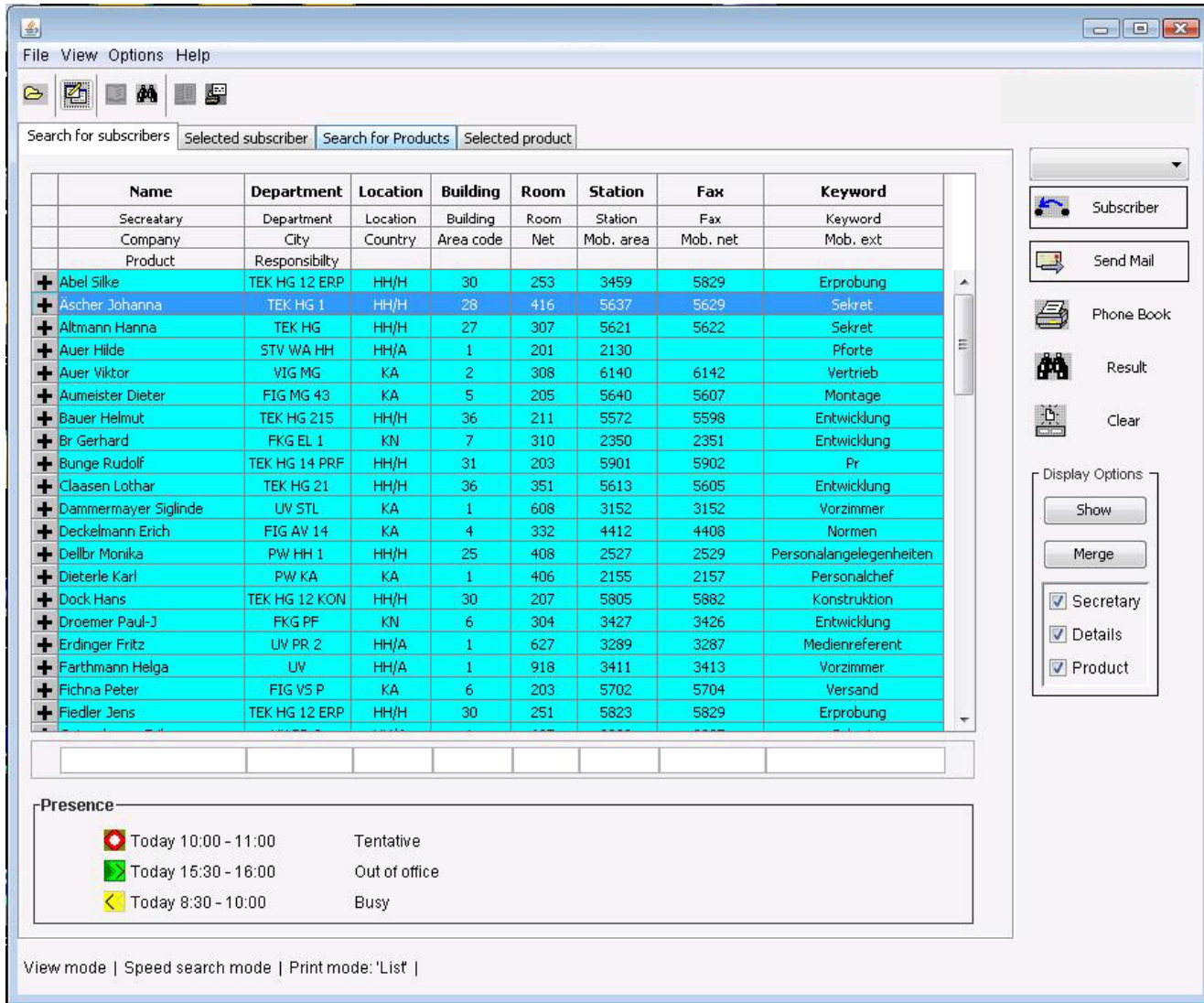





Figure 4 The "Presence" window

The "Presence" window can be positioned between the data grid and the search panel, for example. However, this position can change at any time because, like other window elements, this window is created in runtime mode with the DS-Win Designer.

The calendar entries show the presence of the selected user in chronological order (current record: red). As usual, records can be changed using the mouse, arrows or in the Search field, and the data retrieved after a short period of inactivity (see Section 2.2.2, "DS-Win Presence Settings":

**ChangeSelectionmSec**) from Outlook or Lotus.

These records are used as label text for the 12 fields in the "Presence" window and displayed in 3 rows and 4 columns. They can have the following values and meanings:

Icon	Date	Time	Status
 No longer actual	3 May	All Day	Tentative
 Actual	Today	8.30-9.00	Busy
 Not yet actual	3 May - 6 May		Out of office

In Lotus Notes, only the "Busy" status is available.

The entries are the three most current entries of the selected user. They normally refer to the present or the future. However, one (or more) entries can in worst case be from the past as well, but only today, if there is no other suitable data for the present or the future.

The display of a past event from today can be important, for example, if a meeting doesn't end on time.

In Outlook, it is possible to make overlapping calendar entries. In such cases, DS-Win shows only one entry; the following priorities apply:

- High:Out of office
- Average:Busy
- Low:Tentative

Identification is performed in Outlook or Lotus Notes; accents can be omitted. As in Outlook, it is only necessary to enter the key portion of a name.

The time is not shown if the status is "Out of office" and applies all day. Instead, only the start time and end time are shown ("All day" means that the start time corresponds to the StartWorkHour constant and the end time corresponds to the EndWorkHour constant. See [Section 2.2.2, "DS-Win Presence Settings"](#)). This process is known as "combining date elements".

For the current date, the date is not shown but rather the text constant "Today".

The text "All day" appears in the Time column if the relevant activity takes all day. The start time corresponds to the StartWorkHour constant, and end time corresponds to the EndWorkHour constant. See [Section 2.2.2, "DS-Win Presence Settings"](#)).

Output is to an accuracy of 30 minutes. The entry 8:32-8:45 is shown for example as 8:30-9:00.

If the e-mail address field is empty, the FirstName and LastName columns from the subscriber table for the selected record identify the e-mail account. If the e-mail address field is filled out, however, these entries will be sent instead of the name columns because this information is more unique.

## E-Mail Client and Presence Management

### Presence Management for DS-Win V4

This "Presence" window appears in the following distributed dialog files:

- German (designer\_de.xml)
- English (designer\_en.xml)
- French (designer\_fr.xml)
- Italian (designer\_it.xml)
- Dutch (designer\_nl.xml)
- Danish (designer\_da.xml)
- Hungarian (designer\_hu.xml)
- Czech (designer\_cs.xml)

You can use the Designer to modify existing DS-Win data view custom dialogs for use with "**Presence Management**".

For information about this, see the "E-mail Client Dialog Configuration" chapter in the Designer manual.

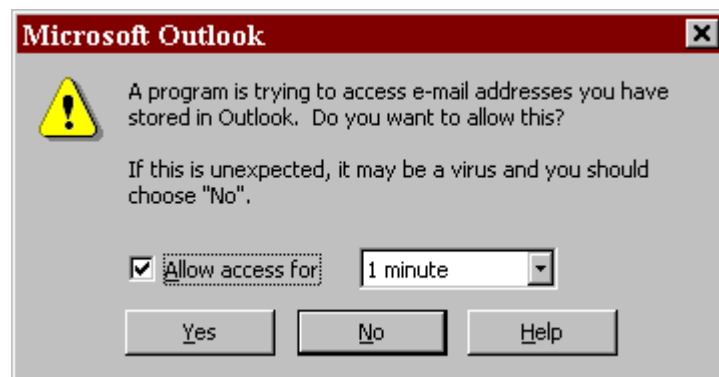
If you no longer need the "Presence" window and need the space for other purposes, proceed as follows:

1. Clear down the database connection.
2. Remove the components described above.

### 3.3.4 Extreme Situations

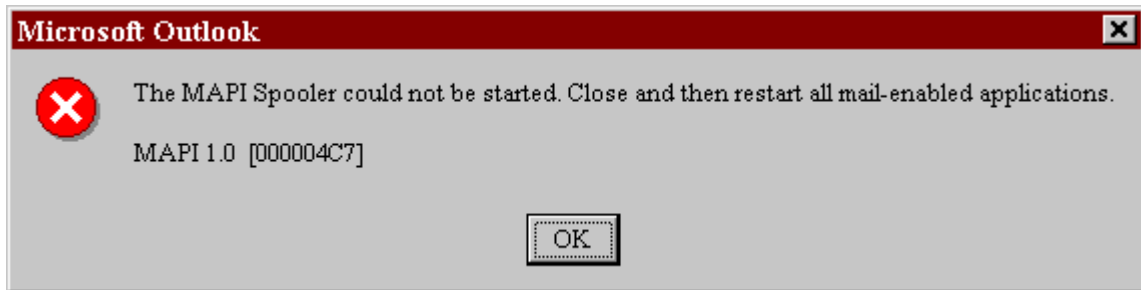
The following windows containing security information appear when installing security patches for Outlook:

This warning is only issued if the security setting is not suppressed. Refer to Abschnitt 3.3.6 for information on how to suppress this setting.



The user should select the maximum time (10 minutes) to minimize disruptions to standard operation. This warning can be deactivated for individual users or user groups in the Outlook server configuration. For further information please ask the specialist staff. Further information on this subject can be found in the Service Manual.

Special handling rules determine how to proceed in exceptional situations, for example if the Exchange Server is not available. In this case, the following message appears:



Follow the instructions. If this does not solve the problem, please contact the specialist staff.

### 3.3.5 Performance

It takes less than a second to retrieve account data from a local server.

MAPI server data can only be refreshed by logging off and on again. This takes on average 2-3 seconds every 2 minutes (default value for SessionRefreshMin). This process runs in the background of a separate thread. The period of inactivity (default value ChangeSelectionmSec 500 ms.) is preset to prevent excessively quick selection.

A delay time (approx. 5-10 minutes in Outlook 2007 or exit and logoff Outlook) is set for synchronization between the Outlook Calendar update and the updated answer from the Exchange Server. The data is thus not immediately updated when the user creates a new calendar appointment entry. Unfortunately, we have no control over this side effect.

1. In Outlook, select Tools -> Options -> Calendar Options -> Free/Busy Options.
2. Set the value for "Update free/busy information on the server every x minutes" to the minimum value of 1 minute.

### 3.3.6 Creating Custom Security Settings

Security settings for Outlook users can be individually adapted in the Outlook Security Form. This form is available via Outlook Security Settings (Public Folders). Fill out this form and send it off. You can do this in two ways: you can create a custom security setting that applies to a specific user group or you can create a default security setting that applies to all users who are not included in a custom security setting. When you choose a custom security setting, you do not need to specify any users, you simply set the "Security Group Name" to "Default Security Settings.off". You will find this file under "C:\Program Files\Unify\DS-Win V4\Outlook\OutlookSec". Please refer to the file "ReadmeOutlookSecurity.txt" in the same directory to establish how and under which conditions this file can be opened.

Default Security Settings - Discussion

File Edit View Insert Tools Actions Help

Post Save Print Cut Copy Paste Undo Redo Help

Outlook Security Settings Programmatic Settings

Default Security Settings for All Users  Security Settings for Exception Group

Security Group Name: Default Security Settings

Members:

**Warning! Lowering any of the default security settings may increase your risk of virus execution and/or propagation. Use caution and read the documentation before modifying these settings.**

Miscellaneous Attachment Settings

- Show level 1 attachments
- Do not prompt about level 1 attachments when sending an item
- Do not prompt about level 1 attachments when closing an item
- Allow in-place activation of embedded OLE objects
- Show OLE package objects

Level 1 File Extensions

Users will not have access to these attachments.

Add:

Remove:

Example: "TXT;ZIP;HTML;BMP"

Level 2 File Extensions

Users can save but not open these attachments in Outlook.

Add:

Remove:

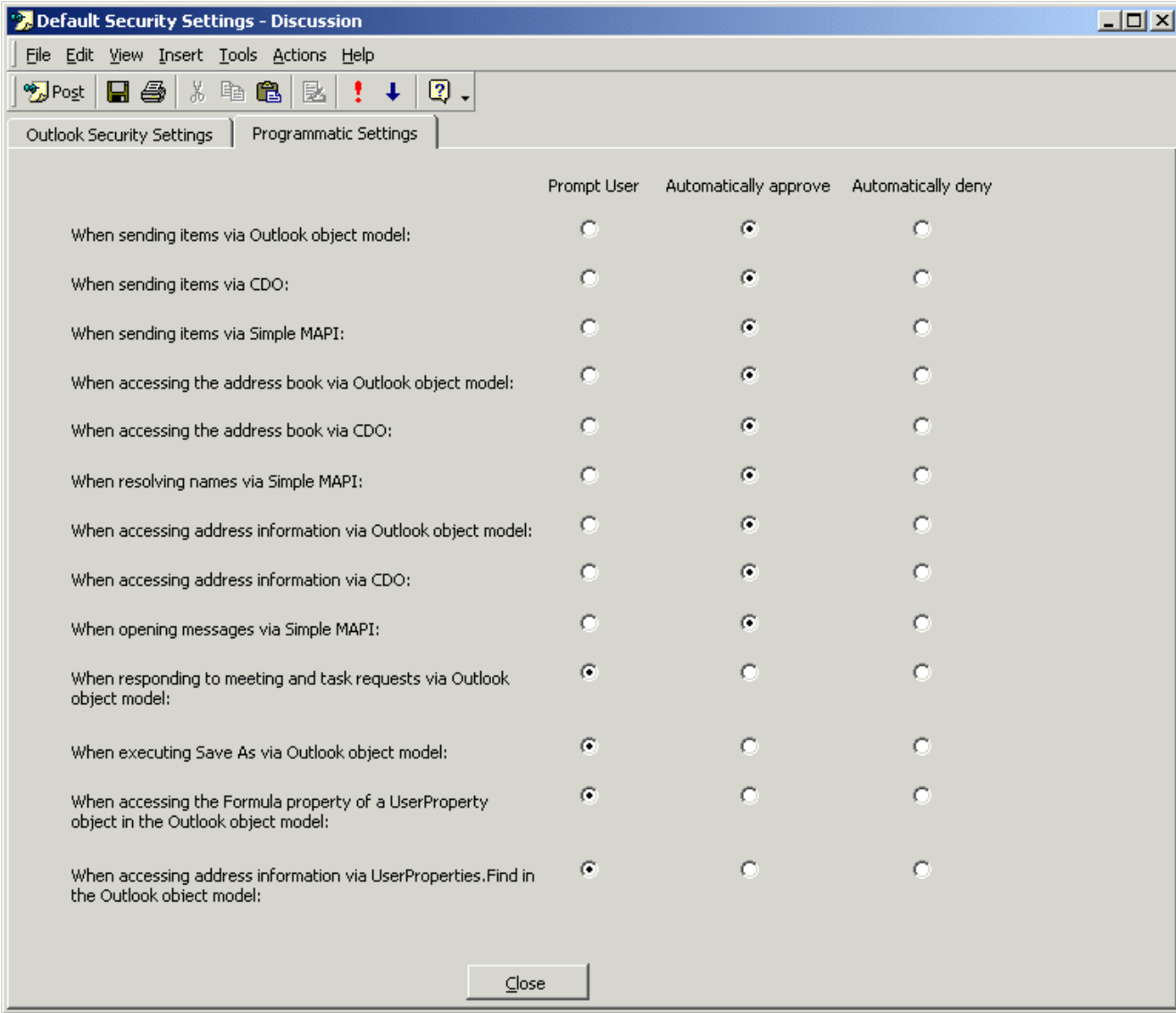
Miscellaneous Custom Form Settings

Enable scripts in one-off Outlook forms

	Prompt User	Automatically approve	Automatically deny
When executing a custom action via Outlook object model:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
When accessing the ItemProperty property of a control on an Outlook custom form:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Close

Tab 1 in the Outlook Security Form: Outlook Security Settings



Tab 2 in the Outlook Security Form: Programmatic Settings

Example: You can create a Power Users item that contains a list of members and the custom settings for this group. User names are stored in the Members box of the form and settings are stored in a variety of user-defined Outlook fields. Security features that you can configure include the following: attachment security, the Outlook Object Model Guard, the Simple MAPI guard, and the file extensions contained in the Level 1 or Level 2 lists for attachment security.

## E-Mail Client and Presence Management

### Presence Management for DS-Win V4

The following two windows show the minimum settings required to run DS-Win V4.

**DS-Win Applikation - Outlook Security Form**

File Edit View Insert Tools Actions Help

Outlook Security Settings Programmatic Settings

Default Security Settings for All Users  Security Settings for Exception Group

Security Group Name:

Members:

**Warning! Lowering any of the default security settings may increase your risk of virus execution and/or propagation. Use caution and read the documentation before modifying these settings.**

**Miscellaneous Attachment Settings**

- Show level 1 attachments
- Do not prompt about level 1 attachments when sending an item
- Do not prompt about level 1 attachments when closing an item
- Allow in-place activation of embedded OLE objects
- Show OLE package objects

**Level 1 File Extensions**

Users will not have access to these attachments.

Add:

Remove:

Example: "TXT;ZIP;HTML;BMP"

**Level 2 File Extensions**

Users can save but not open these attachments in Outlook.

Add:

Remove:

**Miscellaneous Custom Form Settings**

Enable scripts in one-off Outlook forms

	Prompt User	Automatically approve	Automatically deny
When executing a custom action via Outlook object model:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
When accessing the ItemProperty property of a control on an Outlook custom form:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Close

	Prompt User	Automatically approve	Automatically deny
When sending items via Outlook object model:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
When sending items via CDO:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
When sending items via Simple MAPI:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
When accessing the address book via Outlook object model:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
When accessing the address book via CDO:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
When resolving names via Simple MAPI:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
When accessing address information via Outlook object model:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
When accessing address information via CDO:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
When opening messages via Simple MAPI:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
When responding to meeting and task requests via Outlook object model:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
When executing Save As via Outlook object model:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
When accessing the Formula property of a UserProperty object in the Outlook object model:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
When accessing address information via UserProperties.Find in the Outlook object model:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Close

## **E-Mail Client and Presence Management**

Presence Management for DS-Win V4

# Index

## A

Altering sort settings 28  
 Application areas 5  
 Application settings 10

## B

Button 20

## D

Data search 22  
 Data View 9  
 Database 5  
 Deleting search criteria 28  
 Dial functions 6  
 Displaying detailed data 24

## E

E-mail client 33, 35, 36  
 E-mail type 39  
 Export 6

## H

HDMS 6

## I

Icons 19  
 Import 6

## M

MAPI 33  
 Menu 19  
   Database 20  
   File 20  
   Help 20  
   Options 20  
   View 20  
 Menu bar 19

## O

OLE 33, 41  
 Outlook 33, 41  
   Security settings 48

## P

Presence management 33, 42  
   Configuration requirement 43  
   Settings 12  
 Print 6

Printing results 28, 29

## R

Records  
   editing 30  
   navigator 31  
 Result search 22, 23

## S

Search method 22  
 Search modes 6  
 SMTP 35  
 SMTP relay 41  
 SMTP server 33, 39  
 Speed search 22  
 Standard screen 19  
 Submenu 20

## T

Toolbar 19

## U

User interface 6

## V

Viewing search results 23, 24

