

ActiPOINT

# NotesD

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## Introduction

*ActiPOINTNotesD* extends the abilities of *ActiPOINT* by the teamwork with Lotus Notes. There are several individual scenarios configurable by you, which associate either *ActiPOINT* or Lotus Notes the bigger meaning.

*ActiPOINTNotesD* extends optionally the abilities of the TSPs *AastraTAPIduo* and *AsnomTAPIduo*. These additional funktion of *ActiPOINTNotesD* made be indirectly available using *ActiNOTIFY*. In this functional context the features import and export aren't available.

If you want to use primarily or even solely Lotus Notes as your contact manager, choose the settings, which let *ActiPOINT* work in the background. Lotus Notes is extended by the dial of outgoing phone calls and the registration of incoming phone calls. For example, callers are identified by the help of the Lotus Notes contact data and EMail entries are generated according to the settings.

If *ActiPOINT* is your favored contact manager, then it can under the use of *ActiPOINTNotesD* access the contact data of Lotus Notes. Export and import functionalities of all or parts of your contacts data are made available to you.

In the following you find a brief abstract of the contents of the single chapters.

In the chapter ‚Specification and Requirements‘ you find a brief extract from the list of the possibilities of *ActiPOINTNotesD*. Furthermore, please, follow the preferences important for the use, which are likewise listed in this chapter.

The chapter ‚installation‘ describes the steps necessary for the installation and gives assistance, if one or other obstacle appears.










In the chapter ‚configuration‘ the settings for the meaningful use are demonstrated. The behavior of *ActiPOINT* in the teamwork with Lotus Notes during coming in and going out calls is determined by you. The settings, which influence the import and export of contact data are also described in this chapter.

The choice and use of for specific actions, e.g. the import treated in the chapter ‚ACTIONS‘.



We wish you a lot of fun in the everyday use of *ActiPOINT*.

# Specification and Requirements

## Specification of *ActiPOINTnotesD*

-  Integration of the dial options in Lotus Notes.
-  Use of Lotus Notes in a single scenario. *ActiPOINT* remains in the background. Incoming and outgoing calls are registered in Lotus Notes and the suitable contact data is searched.
-  Pop ups of Lotus Notes contact windows and build of EMail entries of the type 'call' for coming in and coming out calls. You have always a look at the past communication with a contact.
-  The method of dialing a contact phone number out of Lotus Notes uses the Lotus Notes Action Menu.
-  The use of *ActiPOINT* in a ,single scenario' permits the quiet access to the contact data of Lotus Notes.
-  Every conceivable mix in the use of *ActiPOINT* and Lotus Notes is possible.
-  Import and export functions from and to Lotus Notes.
-  Choice of the target contact folder for the automatically creation of contacts. Choice of the contact folders, which is used to identify callers.
-  Intuitive and easy working.

## Requirements

-  Installed *ActiPOINT*
-  Installed Lotus Notes (IBM)

# Installation

## Installation of ActiPOINTnotesD

You receive *ActiPOINTNotesD* in form of a packed file in the ZIP format (the file has the ending .zip).

**Tip :**



Before you carry out the installation of *ActiPOINTNotesD*, please uninstall the previous installation of *ActiPOINTNotesD*.

In the following the installation steps are described:

1. Unpack the file in a directory of your choice.  
*(Go under use of Windows Explorer to the directory in which you have filed the ZIP file. Under Windows 2000 or XP you click twice on the name of the ZIP file. Select a directory or make one. You unpack the ZIP file in this directory.)*

**Tip :**



To unpack a file in the ZIP format you need an additional program using Windows 2000 or preceding Windows versions. One possibility is to use 'Winzip', which is also available in a shareware version on the Internet. Follow the documentation under 'Winzip', to unpack the installation files. Under Windows XP the functionality of pack and unpack in the ZIP format is part of the operating system. Use Windows Explorer under Windows XP to unpack the installation files.

2. Start the installation while you open **ActiPOINTNotesD.msi**.  
*(G Using the windows explorer go into the diretory, you have chosen for unpacking. Make a double click of your Mouse onto the file ActiPOINTNotesD.msi)*
3. There appears a window. Please, go to the next installation step.  
*(In the lower line there are two buttons with the label **cancel** and **continue**. Go with the mouse over **continue** and click once or press the key Return once.)*
4. A license text is indicated, which peruse carefully, please. If you can agree to the license text, choose the option 'I agree'. Please, go to the next installation step.  
*(If you want to agree to the license text, please, click with the mouse on the unsatisfactory small circle on the left beside the text 'I agree'. Now the circle must be filled. Furthermore the color of the button **continue** to be found in the lower area changes from gray too clearly*

black. Herewith the button gets selectable. Click **continue>** once using the mouse or press the key Return.)

5. It is offered you the possibility to choose the installation directory. If you want to change the given directory, you do it at this point. Please, go to the next installation step.  
(If the new installation-file path desired by you is known to you completely, type the path in the field ,folder'. If not, you click on the button **search** to choose an alternative installation-file path.)

**Tip :**



It is important that you use the same Installation directory, which you have chosen for the installation of *ActiPOINT*. The installation directories of *ActiPOINT* and *ActiPOINTNotesD* have to be identically !

6. Confirm the wish on installation of *ActiPOINTNotesD* while you go to the next installation step.  
(If you liked to continue the installation, please, click **continue>** once using the mouse or press the key Return.)
7. There appears a horizontal progress bar which informs you about the proceeding of the installation. While the bar fills, the necessary files will be transferred to the hard disk.
8. The end of the installation is indicated. Now *ActiPOINTNotesD* is available to use.  
(Click **continue** once with using the mouse or press the key Return.)

After the installation, please, read the chapter ,basic settings' carefully to be able to effect the necessary setting for the use of *ActiPOINTNotesD*.

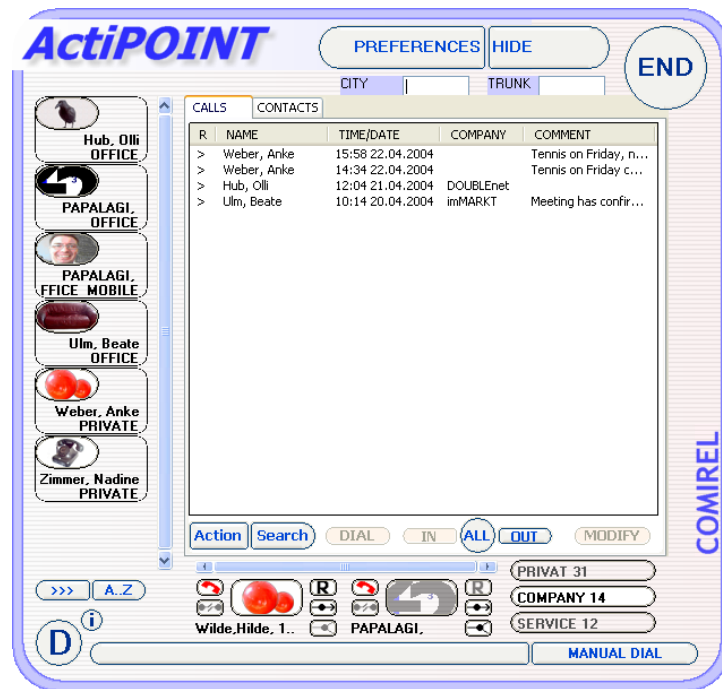
## Deinstallation

The deinstallation of *ActiPOINTNotesD* is described in the follower:

1. Click in the left from the Taskbar on the button **start**. It opens the start menu to itself.
2. Windows XP user jump directly to point 3. , please. Select the menu point 'settings'.
3. Select the menu point ,control panel'. It opens a window of the same name to itself.
4. Please, click on ,add or remove programs'. It opens another window to itself.
5. You see a list of the installed programs. Search *ActiPOINTsnomD* and click on the right side of the entry on the button **Change/Remove**. There appears another window, which gives further instructions to you. Follow these instructions.
6. After a successfully deinstallation of *ActiPOINTsnomD* you close both remained windows.

## Choice of ActiPOINTnotesD

To select *ActiPOINTnotesD* as an application extension to use it in *ActiPOINT*, please open *ActiPOINT*. After opening *ActiPOINT* the main window appears. If you have already added contacts it appears like following one:



Picture 1: Main window, filing card ,CALLS'

In the upper area the button **SETTINGS** is found. Operate this button to open the dialog 'SETTINGS'. Go on the filing card 'APPLICATIONS'

On this filing card a uniform procedure is offered to carry out the settings of these optional, different extensions. These extensions are dynamically bound to *ActiPOINT* and extends it functionally.

On the filing card ,APPLICATIONS' you select the application extensions you want to use.

Furthermore you can be carried out on this filing card the application extensions own actions.



Picture 2: Sub window ,SETTINGS', filing card ,APPLICATION'

## Specific setting of application Extension

First, choose in the area ,CONFIGURATION' of the index filing card 'APPLICATIONS' on the right beside ,application' an application module. In this trap you choose the entry 'NotesD'

*(The choice occurs, while you use the down pointing arrow on the right beside the text field for ,application'. Position the cursor of the mouse on this arrow and press the left mouse once. The text field automatically extends its size and indicates a list of the available application-modules. Please, go with the cursor of the mouse on the name of the desired application-module and click once the left mouse key. Now the name is shown inverted. Therefore you have selected this.)*

Mark now the application-extension chosen by you to the use, while you select the option ,use application'.

*(Please, lead the cursor of the mouse on the small unfilled square on the left beside ,use application'. Press the left mouse key once to select this option. The small square will be filled.)*

### Important :



Farther specific application settings can be carried out after ending and a renewed start of *ActiPOINT* !

About the button **>>> DIALOG** you reach the application-extensions own setting-dialog, if this is made available by the application-extension. You find farther instructions in the chapter 'Configuration'.

## Specific actions of application-extensions

To run one, from an application-extension made available action, select first in the area ,ACTION' of the index card ,APPLICATIONS' on the right beside ,application' an application-extension.

*(The choice occurs, while you use the down pointing arrow on the right beside the text field for ,application'. Position the cursor of the mouse on this arrow and press the left mouse once. The text field automatically extends its size and indicates a list of the available application-modules. Please, go with the cursor of the mouse on the name of the desired application-module and click once the left mouse key. Now the name is shown inverted. Therefore you have selected this.)*

### Tip :





Only the extensions are listed, which make specific actions available.

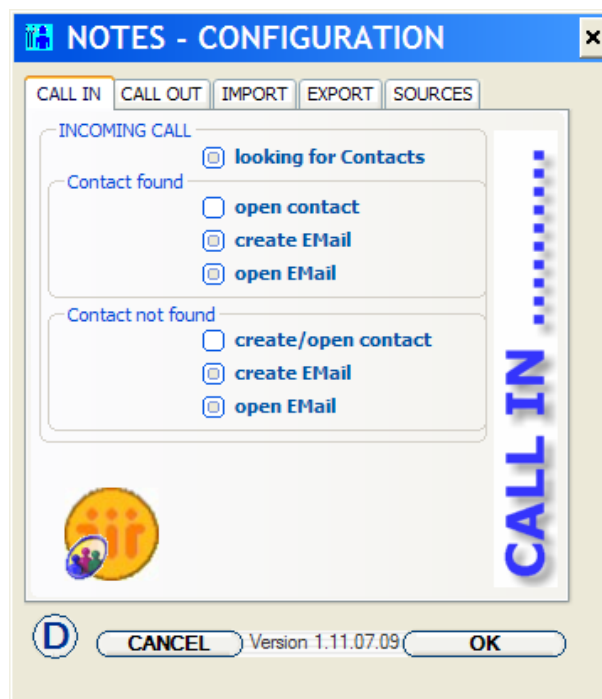
About the button **>>> DIALOG** you reach the application-extensions own action dialog, if this is made available by the application-extension. You find farther instructions in the chapter 'Actions'.

## Configuration

To configure *ActiPOINTnotesD* call on its own configuration dialog using the button >>>DIALOG in the area 'Configuration' (Read the chapter 'Choice of ActiPOINTnotesD'):

Hint :

-  Pressing the button  opens the *ActiPOINTnotesD* documentation (you just see).



Picture 3: ',NOTES-CONFIGURATION', filing card ',CALL IN'

## Settings for incoming calls

On the filing card 'CALL IN' you can carry out the settings, which control the behavior of *ActiPOINT* in conjunction with Lotus Notes in managing incoming calls.

Option ',looking for contacts'

Do you want that *ActiPOINT* is generally looking for contact data in Lotus Notes, you have to select the option 'looking for contacts'

*(Please, lead the cursor of the mouse on the small unfilled square on the left beside ,looking for contacts'. Press the left mouse key once to select this option.)*

In spite of whether a contact is found or not a call entry in *ActiPOINT* will be created always.

## Behaviors in found contacts

### Option ,open contact'

Using the option ,open contact' *ActiPOINT* opens the contact entry in Lotus Notes. You have full access to the suitable Lotus Notes contact data, for example the past calls.

### Option ,create/open EMail'

Using the option ,create/open EMail' *ActiPOINT* generates a new EMail entry in Lotus Notes if an incoming call arrives. *ActiPOINT* indicates you the call by opening the created EMail entry. You can add or modify call data like the actual conversation content.

## Behaviors in not found contacts

### Option ,create/open contact'

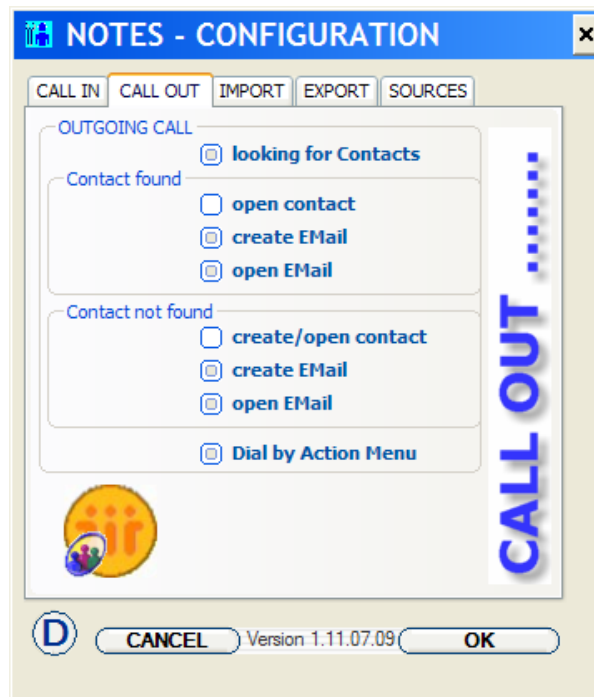
Using the option ,create/open contact' *ActiPOINT* build a new contact entry in Lotus Notes and open it in the Lotus Notes own contact window. You can complement the contact entry by contact data like name, company and phone numbers.

### Option ,create/open EMail'

Using the option ,create/open EMail' *ActiPOINT* generates a new EMail entry in Lotus Notes if an incoming call arrives. *ActiPOINT* indicates you the call by opening the created EMail entry. You can add or modify call data like the actual conversation content.

## Settings for outgoing calls

On the filing card 'CALL OUT' you can carry out the settings, which control the behavior of *ActiPOINT* in conjunction with Lotus Notes in managing outgoing calls.



Picture 4: ,NOTES-CONFIGURATION', filing card ,CALL OUT'

### Option ,looking for contacts'

Do you want that *ActiPOINT* is generally looking for contact data in Lotus Notes, you have to select the option 'looking for contacts'

*(Please, lead the cursor of the mouse on the small unfilled square on the left beside ,looking for contacts'. Press the left mouse key once to select this option.)*

In spite of whether a contact is found or not a call entry in *ActiPOINT* will be created always.

## Behaviors in found contacts

### Option ,open contact'

Using the option ,open contact' *ActiPOINT* opens the contact entry in Lotus Notes. You have full access to the suitable Lotus Notes contact data, for example the past calls.

### Option ,create/open EMail'

Using the option ,create/open EMail' *ActiPOINT* generates a new EMail entry in Lotus Notes if an incoming call arrives. *ActiPOINT* indicates you the call by opening the created EMail entry. You can add or modify call data like the actual conversation content.

## Behaviors in not found contacts

### Option ,create/open contact'

Using the option ,create/open contact' *ActiPOINT* build a new contact entry in Lotus Notes and open it in the Lotus Notes own contact window. You can complement the contact entry by contact data like name, company and phone numbers.

### Option ,create/open EMail'

Using the option ,create/open EMail' *ActiPOINT* generates a new EMail entry in Lotus Notes if an incoming call arrives. *ActiPOINT* indicates you the call by opening the created EMail entry. You can add or modify call data like the actual conversation content.

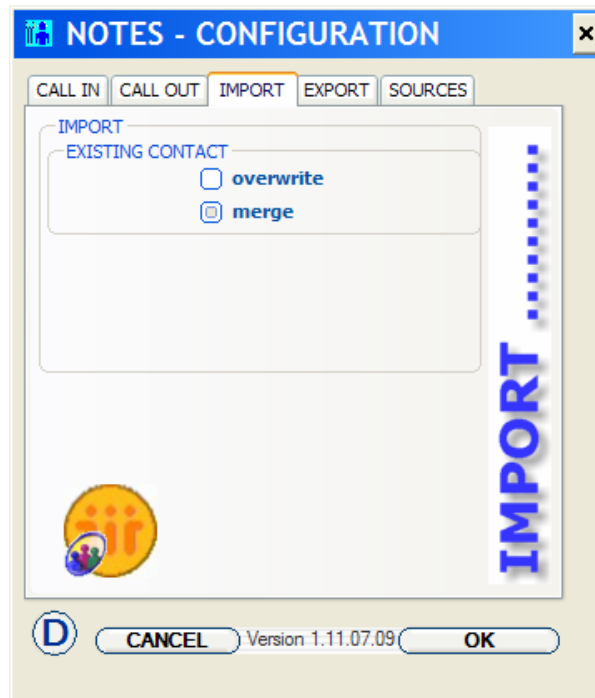
## Menu extension for Dial

### Option ,Dial by Action Menu'

Using the option ,Dial by Action Menu' *ActiPOINT* generates a Menu Entry in the 'Action' Menu, which can be used to dial out of Lotus Notes.

## Settings for the import

The index filing card ,IMPORT' offers settings, which determine the way of import contact data from Lotus Notes. All contact data Lotus Notes contains but are not finding in *ActiPOINT* are added. If you can found identically contact data in both you can give the behavior.



Picture 5: ,NOTES-CONFIGURATION', filing card ,IMPORT'

### Behavior in available contacts

One of both options to be found below must be selected.

#### Option ,overwrite'

Using the option ,overwrite' all contact data in *ActiPOINT*, which are identically found in Lotus Notes will be overwrite. All information about a contact in *ActiPOINT* gets lost and is replaced by the contact data of the same person from Lotus Notes.

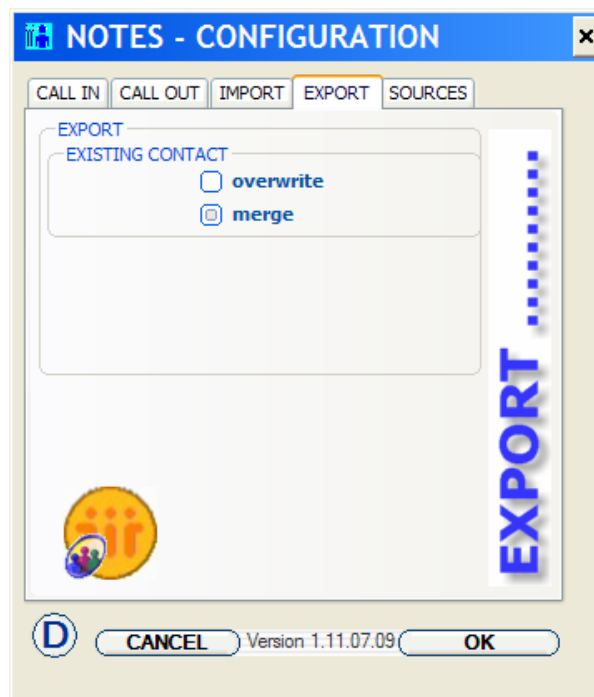
### Option ,merge'

Using the option ,merge' all contact data in *ActiPOINT*, which are identically found in Lotus Notes will be merged with the Lotus Notes contact data. No contact information gets lost of a certain contact in *ActiPOINT*.

For example, is an email address or comment absent in a contact and this information exists in Lotus Notes the information is complemented. Exists there contradictory information in Lotus Notes and in *ActiPOINT* the information available in *ActiPOINT* will maintain.

## Settings for the export

The index filing card ,EXPORT' offers settings, which determine the way of export contact data to Lotus Notes. All contact data *ActiPOINT* contains but are not finding in Lotus Notes are added. If you can found identically contact data in both you can give the behavior.



Picture 6: ,NOTES-CONFIGURATION', filing card ,EXPORT'

## Behavior in available contacts

One of both options to be found below must be selected.

### Option ,overwrite'

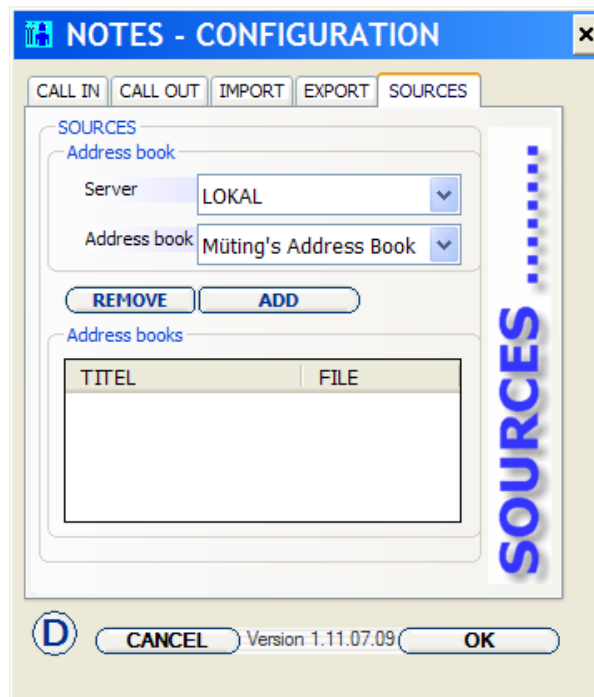
Using the option ,overwrite' all contact data in Lotus Notes, which are identically found in *ActiPOINT* will be overwrite. All information about a contact in Lotus Notes gets lost and is replaced by the contact data of the same person from *ActiPOINT* .

### Option ,verbinden'

Using the option ,merge' all contact data in Lotus Notes, which are identically found in *ActiPOINT* will be merged with the *ActiPOINT* contact data. No contact information gets lost of a certain contact in Lotus Notes. For example, is an email address or comment absent in a contact and this information exists in *ActiPOINT* the information is complemented. Exists there contradictory information in Lotus Notes and in *ActiPOINT* the information available in Lotus Notes will maintain.

## Settings for source address books

The filing card ‚SOURCES’ offers settings, which allow the choice of address books for the search of contacts. All chosen local address books and server address books are used to identify contacts by its phone numbers.



Picture 7: ‚NOTES-CONFIGURATION’, filing card ‚SOURCES’

### Add of an address book

In the area ‘Address book’ you choose the localization of the desired address book in the list on the right side of the Tag ‘Server’. After that you find the selectable address books in the list below. Choose a address book in this list found on the right of ‘address book’.

By operating the Button **ADD** the address book will be added to the list ‘Address books’, which are used for the search.

### Removing of an address book

Select the desired address book in the list ‘address books’. Click on the button **REMOVE** to remove the address book permanently from the list.

## Actions

The actions, which are made available by *ActiPOINTnotesD* are callable in the suitable context.

### Actions in the context settings

To use actions within the context settings, call on the *ActiPOINTnotesD* own action dialog by operating the Button >>>**DIALOG** in the area Actions like described in the chapter 'Choice of ActiPOINTnotesD'




Picture 8: ,NOTES - ACTION'

The following functions can be called by using the corresponding buttons:

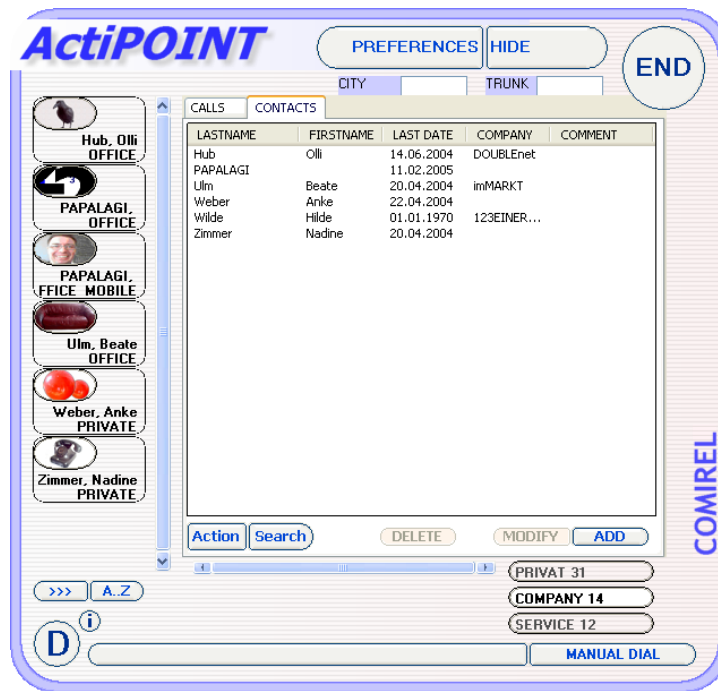
<b>EXPORT ALL CONTACTS</b>	This function enables the export of all contacts to Lotus Notes according to the settings you had done.
<b>IMPORT ALL CONTACTS</b>	This function leads to an import of all contact data of Lotus Notes. Your settings determines the way.

#### Tip :

-  Use the above possibility to match the contact data between both applications in the beginning after the installation. Of course these functions are still available to you later and also in other contexts.

## Actions in other contexts

On the filing card 'contacts' of the main window are found actions for the import and export of single, well-chosen or all contacts.



Picture 9: Main window, filing card ,CONTACTS'

These operations becomes accessible after the operation of the button **ACTION** besides the Button **SEARCH**.  
 After use of this button the filing card changes as follows: The contact list becomes shorter and it appears a button and a choice field.



Picture 10: Main window, filing card ,CONTACTS': Cutting - ACTION -

First select an action:

<b>NOTES: Import contacts</b>	This function initiates an import of all contacts of Lotus Notes to <i>ActiPOINT</i> .
<b>NOTES: Export contacts</b>	This function initiates an export of all contacts of <i>ActiPOINT</i> . If the list of contacts is limited using SEARCH only this choice is exported.
<b>NOTES: export contact</b>	Only the selected contact will be exported.
<b>NOTES: Export chosen contacts</b>	Only the selected contacts will be exported.

*(The choice occurs, while you use the down pointing arrow on the right beside the text field for,action'. Position the cursor of the mouse on this arrow and press the left mouse once. The text field automatically extends its size and indicates a list of the available actions. Please, go with the cursor of the mouse on the name of the desired action and click once the left mouse key. Now the name is shown inverted. Therefore you have selected this.)*

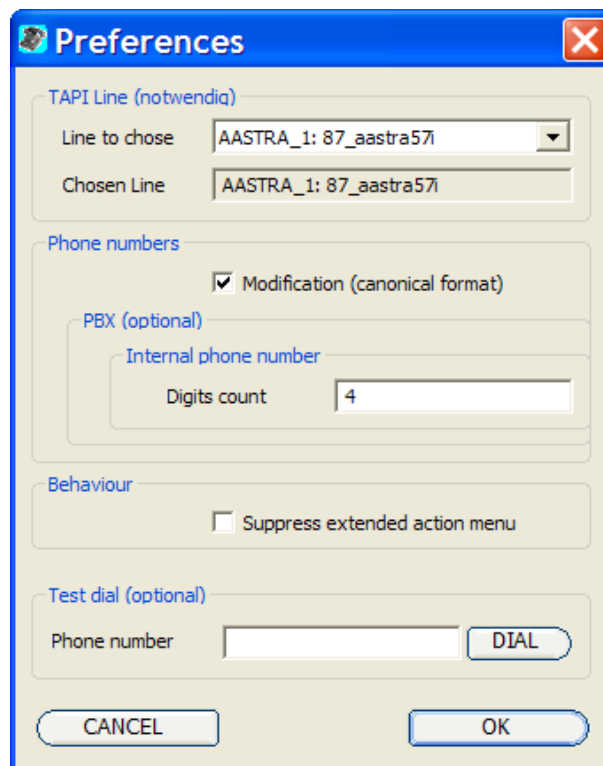
The button being on the right carries the name of the selected function. Use this button to initiate the selected function.

## Phone calls out of Lotus Notes

Do you have enabled the option 'Dial by Action Menu', *ActiPOINTnotesD* offers you the feature to initiate phone calls from Lotus Notes. Prerequisite is the selection of a telephone line in the preferences dialog.

### Preferences dialog

The preferences dialog is achieved through the call dialog. To do this, select the menu item 'Actions' or 'Aktionen' in the main menu of Notes. As a submenu you find the entry 'CALL DIALOG >>>'. Use it to open the call dialog which carries the button **Preferences**. A click onto this button opens following dialog:



Picture 11: Preferences dialog

## Line selection

Please use the selection box next to the label 'Line to choose' to determine the wanted phone line for outgoing calls. This setting is necessary.

## Settings for phone numbers

### Modification

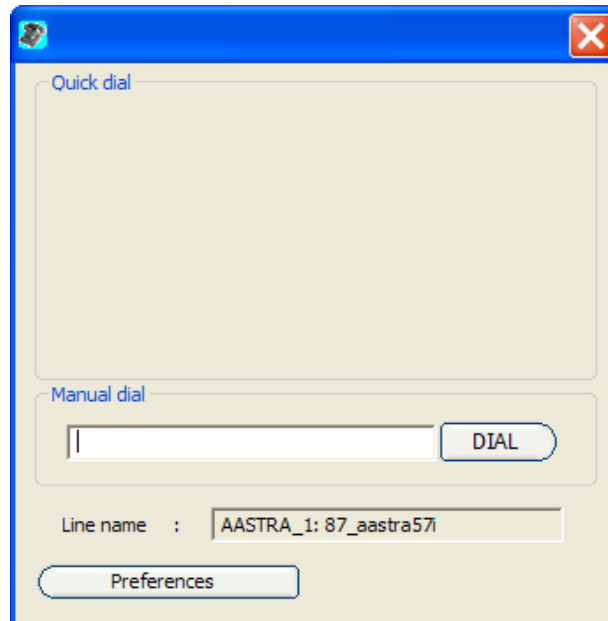
Choosing this option results in the conversion of related calls phone numbers in canonical format to a dialabel form before it is passed to the by line selected TSP (TAPI Service Provider).

### Internal phone numbers

To identify internal phone numbers in conjunction with a telephone system (PBX) and to be able to treat number modification properly enter the number of digits for internal numbers, please.

## Calls from any context / database

*ActiPOINTnotesD* permits to any time to initiate a call. To do this, select the menu item 'Actions' of the Notes main menu. You find the submenu entry 'CALL DIALOG >>>'. It opens the following dialog, if you use this submenu entry :



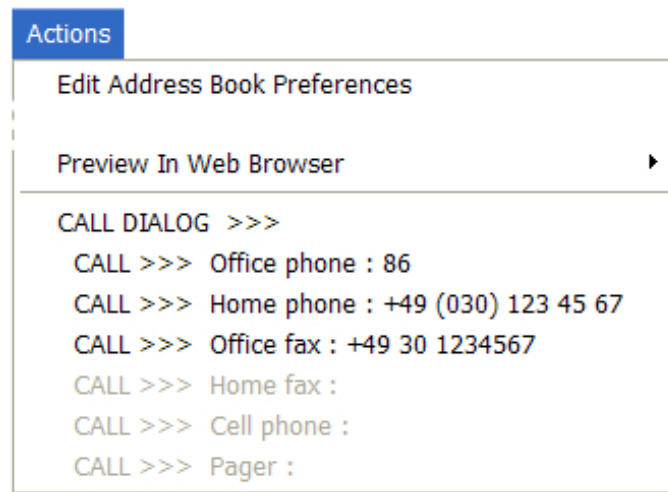
Picture 12: Call dialog (any context)

Enter the phone number to be dialed in the text box to the left of the button **DIAL** and use the button to initiate the call.

## Call from contact document or address book

Open the contact document of the person you want to contact by phone. Or select a contact in the contact list of your address book (The row must be highlighted). In the bottom-to-find example Mr. Heinrich Müller was chosen.

Then select the menu item ‚Actions‘ in the main menu of Notes.



Picture 13: Actions Dialog Lotus Notes

As menu entry you find ‚CALL DIALOG >>>‘.

Furthermore, as a innovation of this release you find more **menu entries with dialable numbers of a contact**. Only one click of any the number entries initiates a call. For example 'CALL >>> Office phone : 86'

Alternatively, the use of the menu entry ‚CALL DIALOG >>>’ opens the call dialog:




Picture 14: Call dialog (contact entry / address book)

Use the button belonging to the respective phone number to start a phone call with the selected contact.

From the example you press the button with the phone number **86** to reach Mr. Müller in his office.

**Hint :**

 The language of the phone categories labels depends on your Notes installation.

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