



INTEGRATION NOTE



Deploying Cisco Phone Control and Presence 7.0 with IBM Lotus Sametime

- 1** About Deploying the Plug-in
- 2** How to Set Up the Plug-in Update Site
- 3** How to Prepare Users to Set Up and Use the Plug-in
- 4** How to Troubleshoot Problems with Using the Plug-In
- 5** Where to Find More Documentation

1 About Deploying the Plug-in

- [Installation Methods](#), page 2
- [Deployment Checklist](#), page 2

Installation Methods

There are methods for installing the plug-in on user workstations:

- You can set up Lotus Sametime to automatically install the plug-in on user workstations by using a push update. Refer to the Lotus Sametime documentation for information on how to set up a push update.
- Users can install the plug-in on their workstations themselves. With this method, you must provide users with the URL of the update site. For instructions on how to install the plug-in without using a push update, refer to the *Quick Start Guide for Installing and Using Cisco Phone Control and Presence 7.0 with IBM Lotus Sametime*.

Regardless of the installation method you choose, users will need to configure Sametime Connect with information such as their phone system user name and password to enable the plug-in features. For details on configuring Sametime Connect after the plug-in is installed, refer to the *Quick Start Guide for Installing and Using Cisco Phone Control and Presence 7.0 with IBM Lotus Sametime*.

The quick start guide is available at http://www.cisco.com/en/US/products/ps9830/products_user_guide_list.html.

Deployment Checklist

Table 1 provides an overview of the administrative tasks involved in preparing for and deploying the plug-in.

Table 1 Deployment Checklist

Task	Notes	For details, see...
Gather the requirements.	Required. You must be familiar with the requirements and supported versions of software for the system, including user workstations.	<i>Release Notes for Cisco Phone Control and Presence with IBM Lotus Sametime</i> at http://www.cisco.com/en/US/docs/voice_ip_comm/cucibmlotus/cpcap/7x/english/release/note/cpcapRN.html
Decide which features to enable for all users.	Recommended. Familiarize yourself with the available features. You will use the information when you set up the update site.	<i>Release Notes for Cisco Phone Control and Presence with IBM Lotus Sametime</i> at http://www.cisco.com/en/US/docs/voice_ip_comm/cucibmlotus/cpcap/7x/english/release/note/cpcapRN.html
Provision users in Cisco Unified Communications Manager.	Required. Users must be set up correctly with the devices that they will use with the plug-in.	<ul style="list-style-type: none"> • <i>Cisco Unified Communications Manager Administration Guide</i> • <i>Cisco Unified Communications Manager System Guide</i>
Associate users with the Standard CTI Enabled user group in Cisco Unified Communications Manager.	Required if users will use the Control Desk Phone feature of the plug-in.	<ul style="list-style-type: none"> • <i>Cisco Unified Communications Manager System Guide</i>, “Computer Telephony Integration” section
Configure dialing rules in Cisco Unified Communications Manager.	Recommended if users will use the plug-in in Control Desk Phone mode.	<i>Cisco Unified Communications Manager Administration Guide</i>
Provision users in Cisco Unified Presence.	Required if users will use the Phone Status feature of the plug-in.	Cisco Unified Presence documentation

Table 1 **Deployment Checklist (continued)**

Task	Notes	For details, see...
Configure Cisco Unified Communications Manager Capability Assignments to enable licenses for Cisco Unified Presence.	Required if users will use the Phone Status feature of the plug-in.	<ul style="list-style-type: none"> For license requirements—<i>Release Notes for Cisco Phone Control and Presence with IBM Lotus Sametime</i> at http://www.cisco.com/en/US/docs/voice_ip_comm/cucibmlotus/cpcap/7x/english/release/note/cpcapRN.html For configuration instructions—<i>Cisco Unified Communications Manager Administration Guide</i>, “License Capabilities Assignment Configuration” section
Set up the plug-in on the Sametime server update site.	Required. Involves configuring and packaging the plug-in software, JTAPI .jar file, and dialing rules files (if applicable), on the update site.	How to Set Up the Plug-in Update Site, page 3
Set up a push update.	Optional. If you do not set up a push update, users must install the plug-in themselves on their client workstations.	Installation Methods, page 2
Prepare users to install and use the plug-in.	Recommended. Provide users with the information they will need to install and configure, and use the plug-in for your deployment, including information about how to get support.	How to Prepare Users to Set Up and Use the Plug-in, page 7

2 How to Set Up the Plug-in Update Site

Regardless of your method of deployment—push update or user-initiated installation—you must use the configuration utility to process the plug-in files before installation.

If you are enabling the Control Desk Phone option, you must set up separate update sites for users who are using different versions of Cisco Unified Communications Manager, and for users who have different dial rules.

- [Setting Up Your Local Working Directory, page 3](#)
- [Creating Dial Rules Files, page 4](#)
- [Configuring and Packaging the Plug-in Files, page 5](#)
- [Uploading the Files to the Update Site, page 7](#)

Setting Up Your Local Working Directory

Before You Begin

Refer to the *Release Notes for Cisco Phone Control and Presence with IBM Lotus Sametime* at http://www.cisco.com/en/US/docs/voice_ip_comm/cucibmlotus/cpcap/7x/english/release/note/cpcapRN.html for the URL for the Cisco Unified Communications with IBM Lotus page on Cisco.com.

Procedure

Step 1 Create a local working directory to hold the plug-in files for processing.

Step 2 Go to the Cisco Unified Communications with IBM Lotus page.

Step 3 Log in as a registered Cisco.com user.

Version	File
Sametime Connect 8.0	CiscoPhoneUpdateSiteFiles_7.0.1. <i>Version</i> -ST800.tar.gz
Sametime Connect 7.5.1	CiscoPhoneUpdateSiteFiles_7.0.1. <i>Version</i> -ST751.tar.gz

Step 4 Download the file CiscoPCAPWithLotusST_7.0.1.[*Version*].tar.gz.

Step 5 Extract the files to the directory that you created in [Step 1](#).

Step 6 If you are adding the plug-in to an existing update site, replace the extracted `site.xml` file in the CiscoPCAPWithLotusST_7.0.1.[*Version*]\UpdateSite directory with a copy of the `site.xml` file from the existing update site.

What to Do Next

If you are enabling the Control Desk Phone option, continue to the [“Creating Dial Rules Files”](#) section on page 4. Otherwise, skip to the [“Configuring and Packaging the Plug-in Files”](#) section on page 5.

Creating Dial Rules Files



Note If you are deploying the plug-in with only the Dial Using Cisco IP Communicator option, this section does not apply. Skip to the [“Configuring and Packaging the Plug-in Files”](#) section on page 5.

Cisco recommends that you include dial rules with the plug-in files if you are deploying the plug-in with the Control Desk Phone option. Otherwise, the plug-in may not be able to process some outgoing or incoming calls correctly.

Replicate in XML format the dial rules and directory lookup rules that are configured in Cisco Unified Communications Manager.

Procedure

Step 1 Open the `applicationdialrules.xml` file in the CiscoPCAPWithLotusST_[*Version*]/templates directory of the extracted plug-in files using a text editor such as Notepad or Vim.

The file has the following structure:

```
<?xml version="1.0" encoding="UTF-8"?>
<DialRules>
  <DialRule NumDigits="" BeginsWith="" DigitsToRemove="" PrefixWith=""/>
  <DialRule NumDigits="" BeginsWith="" DigitsToRemove="" PrefixWith=""/>
</DialRules>
```

Step 2 Refer to the dial rules created in Cisco Unified Communications Manager Administration to fill in the applicable attributes for a dial rule and to complete the set of rules.

Order DialRule elements from highest to lowest priority, as they are configured in Cisco Unified Communications Manager. Note that the smaller the priority number, the higher the priority.

Step 3 Save the file.

Step 4 If Cisco Unified Communications Manager is configured with directory lookup rules, repeat [Step 1](#) through [Step 3](#) with the directory lookup rules, using the `directorylookuprules.xml` template file.

Troubleshooting Tips

Refer to the applicable version of Cisco Unified Communications Manager documentation for information about where dial rules and directory lookup rules are configured in Cisco Unified Communications Manager Administration.

What to Do Next

Continue to the next section, [Configuring and Packaging the Plug-in Files](#), page 5.

Configuring and Packaging the Plug-in Files

You use the plug-in configuration utility to package the update site files and to configure settings that apply to all users of the plug-in. You can use the utility for automatic installations (for example, push installations) and for user-initiated installations of the plug-in, and for updating user configuration information after the plug-in is installed.



Note The utility copies the JTAPI .jar file from the Cisco Unified Communications Manager server and packages it with the main plug-in on the update site. Thus, if you are enabling the Control Desk Phone option, you must run the configuration utility to ensure that the correct version of JTAPI is installed on client workstations.

For configuration changes to take effect, you must either set up Lotus Sametime to automatically update users by using a push update, or instruct users to update the plug-in from their Lotus Sametime client.

Before You Begin

- Your saved field settings will overwrite corresponding end-user settings when the configuration feature installs on client workstations.
- Several fields in the utility have a Read Only option. Check the **Read Only** check box if you do not want users to change that setting in Sametime Connect.
- Extract the plug-in configuration utility—`CiscoCfg-7.0.1.[Version]-windows.zip`— from the `CiscoPCAPWithLotusST_7.0.1.[Version]` directory of the extracted plug-in files in your local working directory.

Procedure

-
- Step 1** Double-click `cisocfg.exe` in the `cisocfg` directory to start the configuration utility.
- Step 2** Specify the location of the local working `CiscoPCAPWithLotusST_7.0.1.[Version]/UpdateSite` directory in the Directory field under Update Site Location.
- Step 3** Check **Enable Dial Using Cisco IP Communicator** if you want to enable this option for all users.
- Step 4** Check **Enable Control Desk Phone** if you want to enable this option for all users.
- Step 5** If you are enabling Control Desk Phone for all users, specify system-wide settings for the feature:
- a. Enter the voicemail pilot number.
 - b. Enter the name or IP address of the Cisco Unified Communications Manager server from which to get the correct version of JTAPI for the plug-in.



Note This value is required, and the utility must be able to connect to the server.

- c. Check **Use as Default Cisco Unified Communications Manager** if you want to set this server as the default for all users.
 - d. Check **Use Sametime Credentials** if users have the same user name and password for Cisco Unified Communications Manager and Sametime Connect, and if you want to set these fields for all users.
If you do not check this check box, users must enter their credentials in Sametime Connect.
 - e. If you created dial rules files, specify the locations of the files in the Application Dial Rules and Directory Lookup Dial Rules fields.
- Step 6** Select the default mode for all users, if applicable.
- Step 7** If you are enabling the Dial Using Cisco IP Communicator and/or Control Desk Phone option(s), specify the directory settings for the LDAP server to use to look up phone numbers for contacts and to resolve callers into Sametime contacts.

Either Cisco Unified Communications Manager and the Lotus Sametime server should use the same LDAP directory server, or the directory servers must use the same unique user name or user ID to represent the same user in each directory. The directory server you specify can be the same as or different from the one used by the Lotus Sametime server.

Table 2 **Directory Settings Fields**

Name	Description
Server	The name or IP address of the LDAP server.
Port	The number of the port used to communicate with the LDAP server.
Search Base	The base (or root) of the directory service in which to search for names. The base can be a country, organization or other type of group. For example: ou=active,ou=employees,ou=people,o=cisco.com
Phone Number Field	The field on which to perform phone number lookups in LDAP. For example: telephonenumber,mobile
User ID Field	The unique user identifier field in LDAP on which to perform contact lookups in the Sametime directory. For example: <ul style="list-style-type: none"> • For Active Directory—use sAMAccountName • For Netscape Directory—use uid
Display Name Field	The field in LDAP with the user-friendly text name to display in Sametime for an incoming caller, if the caller is not a Sametime contact.
Authentication Required	If the Directory Server requires authentication, check this check box, and provide the applicable authentication credentials.
Distinguished Name	The distinguished name with which to bind for authentication. For example: uid=ldapuser,ou=active,ou=employees,ou=people,o=cisco.com
Password	The password for authentication.

Step 8 Check **Enable Phone Status** if you want to enable this option for all users.

Step 9 If you are enabling the Phone Status feature, specify system-wide settings for the feature:

- a. Enter the name or IP address of the Cisco Unified Presence server.
- b. Check **Use Sametime Credentials** if users have the same user name and password for Cisco Unified Presence and Sametime Connect, and if you want to set these fields for all users.

If you do not check this check box, users must enter their credentials in Sametime Connect.

- c. Specify which user identifier in Sametime to use to subscribe to user phone status on the Cisco Unified Presence server:
 - Use User ID—the uid field in the contact ID, if available. Otherwise, the username portion of the e-mail address.
 - Use E-mail Address—the full e-mail address (typically, [Username]@[Domain])

Step 10 Select the version(s) of Sametime Connect that users are using.

Step 11 Check **Turn On Enable Detailed Logging** if you want user log files to include more detailed information by default.

Step 12 Select **File > Save**.

The Console tab displays the status of the operation, including errors useful for troubleshooting.

Step 13 Select **File > Exit** when the operation has completed successfully.

What to Do Next

Continue to the next section, [Uploading the Files to the Update Site, page 7](#).

Uploading the Files to the Update Site

The files and folders that you copy to the update site differ, depending on whether you are setting up a new site or modifying an existing one.

To...	Do This
Upload files to a new site.	Copy the entire UpdateSite directory from your local working CiscoPCAPWithLotusST_7.0.1.[Version] directory to the web server that will host the update site.
Upload files to an existing site.	<ul style="list-style-type: none">• Replace the site.xml file on the update site with a copy of the site.xml file from your local working CiscoPCAPWithLotusST_7.0.1.[Version]\UpdateSite directory.• Copy all files in your local working CiscoPCAPWithLotusST_7.0.1.[Version]\UpdateSite\features directory to the features directory of the update site.• Copy all files in your local working CiscoPCAPWithLotusST_7.0.1.[Version]\UpdateSite\plugins directory to the plugins directory of the update site.

3 How to Prepare Users to Set Up and Use the Plug-in

The information and instructions that you need to provide users depends on several factors: which of the plug-in features you enable, whether you set up the plug-in to install automatically, and which settings you pre-configure with the update site files.

To install and configure the plug-in, ensure that your users have the following:

- Access to a supported version of Sametime Connect and instructions for installing it, if needed.
- Information about the plug-in features supported in your deployment.
- If users must install the plug-in themselves, the URL for the update site, and access to the *Quick Start Guide for Installing and Using Cisco Phone Control and Presence 7.0 with IBM Lotus Sametime* for the installation instructions.
- If users must enter system settings such as servers or directory services themselves, provide them with the applicable values to use, and access to the User Quick Start Guide for the configuration instructions.

To use the plug-in, ensure that your users have access to the *Quick Start Guide for Installing and Using Cisco Phone Control and Presence 7.0 with IBM Lotus Sametime* and information about how to get support.

4 How to Troubleshoot Problems with Using the Plug-In

- [Using Logging to Troubleshoot Issues, page 7](#)
- [Obtaining a Problem Report, page 8](#)

Using Logging to Troubleshoot Issues

When troubleshooting issues with the plug-in, you can inspect the following log files for errors and warnings:

- Sametime 7.5.1—C:\Documents and Settings\Windows user ID\IBM\RCP\Sametime\Sametime.log.0. and C:\Documents and Settings\Windows user ID\IBM\RCP\Sametime\metadata.log
- Sametime 8.0— trace-log-0.xml and error-log-0.xml in C:\Documents and Settings\Windows user ID\Application Data\Lotus\Sametime\logs

To obtain the maximum information in the log file, check Enable Detailed Logging on the Preferences > Cisco > Call Control > Troubleshooting tab in Sametime Connect.

Obtaining a Problem Report

If any unexpected or unresolvable issues occur, users can generate a report with detailed configuration and logging information that can assist Cisco TAC in troubleshooting the issue. To obtain the report, enable detailed logging and reproduce the problem, then click Create Problem Report on the Preferences > Cisco > Call Control > Troubleshooting tab in Sametime Connect.

5 Where to Find More Documentation

For information about how to install and use the plug-in, refer to the *Quick Start Guide for Installing and Using Cisco Phone Control and Presence 7.0 with IBM Lotus Sametime* available at

http://www.cisco.com/en/US/products/ps9830/products_user_guide_list.html.

For information about how to use Cisco IP Communicator, see the applicable user guide at

http://cisco.com/en/US/products/sw/voicesw/ps5475/products_user_guide_list.html.

For information about how to use the Cisco Unity Plug-in for Sametime Connect, see the applicable user guide at

http://www.cisco.com/en/US/products/sw/voicesw/ps2237/products_user_guide_list.html.



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