TK-Suite Client 4.3

User manual

Contents

1 Introduction

Thank you for using TK-Suite.

Contacts, appointments and notes

TK-Suite organizes your contacts, appointments and notes.

Maintain and use these data with TK-Suite Client. The group option enables efficient teamwork.

Telephony

Would you like to call someone? TK-Suite Client will set up the call. You can create favourites for numbers called particularly frequently and dial these simply by double-clicking.

Has a customer asked for a call-back from one of your colleagues? Simply write him a reminder with the customer's number attached.

You control forwarding and conference calls with the call flags.

The call log gives you an overview of all your calls.

2 Installation

2.1 Installation

Windows

Install TK-Suite Client by running the installation file. During installation, you can enter an installation path and select a program group in which to create a link.

To start TK-Suite Client automatically with each Windows login you can instruct the set-up program to make an entry in the startup group.

Mac OS X

TK-Suite Client is delivered as a .zip file or .dmg image. Double-click to unzip the .zip file or integrate the .dmg image as a drive.

In both cases, you can drag and drop the TK-Suite Client symbol into the “Applications” folder.

Now double-click on the TK-Suite Client symbol to start TK-Suite Client.

Linux

Unzip the .tar file to any position in the file system. Start TK-Suite Client with the “run_client.sh” script.

2.2 First start

After the first start, you will be prompted to create an account. Read the accounts section to learn more about this.

3 TK-Suite modules

TK-Suite’s functionality can be extended by modules which are available separately. In this documentation, the relevant features are marked with a note.

Registration for extending TK-Suite is a prerequisite.

3.1 Registering TK-Suite

Registering a TK-Suite installation means that you can extend the range of features using additional modules.

To register TK-Suite, proceed as follows:

- Set up an account for a user who has ***Licence purchase*** right. Create this user if necessary. Account information is in section 4.
- If a connection to the TK-Suite Server has been set up, you can select the ***TK-Suite Registration*** heading in the ***Help*** menu.
- Follow the notes in the dialogue box there to register the TK-Suite Server.

3.2 Purchase modules

You can use modules to extend a registered TK-Suite installation. Go to the Help menu and select the ***TK-Suite Registration*** heading to do this. Now use the ***Test/buy modules*** button to extend the range of features.

4 Accounts

You use an account to set up a connection to a TK-Suite Server. This may be a TK-Suite Server that is running on another PC in the network, on the same PC as TK-Suite Client or, for example, directly in TK-HomeServer.

4.1 Creating accounts

When you start TK-Suite Client, you will be prompted automatically to create an account. You can also create or delete an account in the ***File/Accounts...*** menu later on.

Type of account

There are three different types of account.

Default

This type of account gives you access to the TK-Suite databases for contacts/appointments and notes. You can also dial numbers and display status information (CTI). You can also change the settings in the PBX system (configuration).

Control Only

You can also dial numbers and display status information (CTI) with this type of account. Access to the TK-Suite databases of the TK-Suite Server is barred, but information can be requested from other contact sources (e.g. that from an additional "default" account or contact data from Outlook).

This account is useful, for example, whenever you want CTI calls to a number of PBX systems, but are only using one of the TK-Suite Servers for data administration or, for example, you only want to access Outlook data.

Configuration

Calling up the configuration settings is possible with ease using this type of account. Neither CTI nor TK-Suite data are exchanged with this account.

This account is useful, for example, for system administrators.

Connected with TK-Suite Server

First of all, enter the type of access to the TK-Suite Server. If the TK-Suite Server is accessible on the network, then enter the IP address or host name of the PC or TK-HomeServer on which the TK-Suite Server is running.

Enter the login data

In the TK-Suite Server, an administrator will create users who can have different privileges. Each user has a login name and a password.

No TK-Suite users have been created in the suite as delivered. Therefore, click as necessary on the link ***"TK-Suite User Administration"*** to add a new user.

4.2 Enabling/disabling accounts

Right click on an account in the account overview at the bottom of the window to disable an enabled account temporarily or to enable a disabled account.

A disabled account behaves as if it were a non-existent account. In this way, for example, access to the contact data of a disabled account is not possible.

4.3 Workstation Mode

You can use the "Workstation Mode" additional module to set up a TK-Suite Client so that users can log into a configured TK-Suite Server by entering their login name and their password.

The working interface in this mode is secured automatically on the server and reproduced after login.

There is more information on this topic in section 22.

5 Window

After configuring an account for the first time, depending on the account type, an appropriate default desktop will be generated. You can adapt this desktop as far as possible to your requirements.

When generating a default account, the following allocation is used:

- Main window: Telephony
  Combines fast contact search, a favourite field for internal status, a favourite field for "My Favourite Contacts" and a call log.
- Main window: Contacts
  Allows structured access to contact data. This view is used for simple administration of contacts in different folders.
- Main window: Calendar
  A calendar, toggled between two different views. The calendar can be displayed either as a graph or list.

- Main window: Notes
  Allows structured access to note data. This view is used for simple administration of notes in different folders.
- Main window: Chat
  Enables simple sending of text messages to one or more other TK-Suite users.

5.1 Main Windows

You can toggle between main windows using the main window toolbar or a hotkey combination. Right click on the toolbar to change the main window toolbar display.

The TK-Suite Client notes the size of the program window for each main window.

5.2 Sub Window

Sub windows can be embedded in each main window. These can be docked using the mouse on the left, right, top and bottom in a main window.

For example, both favourite windows and the call log are embedded as sub windows in the “Telephony” main window in the default desktop.

5.3 Floating Windows

“Floating windows” always float over all other applications. You can dock this window at one edge of your desktop and minimise or restore it by clicking on the window titles.

Clicking on the Close cross conceals a floating window. You can display concealed windows again by means of the ***Window*** menu, a hotkey combination or the menu in the Info area.

The Info area is next to the clock when running under Windows, in the menu line under Mac OS and in different positions under Linux, depending on the desktop used.

5.4 Creating new windows

There are menu entries for creating new windows in the Window menu.

5.5 Window Manager

You can reorganise your windows and assign hotkey combinations in the dialogue box under the ***Window/Window Manager...*** menu heading.

Creating windows

You can click on one of the “Plus” symbols to create new windows. For example, to create a new sub window, click on the “Plus” symbol next to the main window required.

Changing the window type

You can, for example, change a sub window into a floating window by dragging it with the mouse to the “Floating window” entry.

Please note that not every window can accept every window type. Neither can the window type be changed in main windows with sub windows.

Removing windows

Click on the “Minus” symbol next to the window title to remove a window.

You cannot remove main windows with sub windows. Please remove sub windows first.

Assigning hotkey combinations

You can assign hotkey combinations across the system under Windows and Mac OS X. To do this, click on “No Hotkey” or the currently set hotkey combination. You can set a hotkey combination in the dialogue box which now opens.

5.6 Resetting window setup

Selecting the ***Window/Reset Window Setup*** menu heading restores the default desktop.

Please note that your settings, such as favourites, will also be reset at the same time!

6 Telephony

6.1 Searching and dialling

You can search for contacts quickly and easily in the ***Telephony*** window. To do this, enter a telephone number or part of the surname. Now use the mouse or the arrow keys to select a telephone number or other contact information.

Double-clicking the mouse or pressing the Enter key dials telephone numbers. The telephone which is in the ***Dial for*** list is dialled. This list is always bottom right in the program window.

If you selected an email address, TK-Suite Client starts the default email program. If you selected a web address, TK-Suite Client starts the default web browser program.

6.2 Internal system subscribers

A favourite window with the title ***Internal system subscribers*** is the default creation. Although in theory you can create any type of favourite there, it is primarily designed for recording internal subscribers. Read the Favourites section to learn more about this.

7 Favourites

Favourite windows can be created as main windows, sub windows or floating windows.

They are used to record frequently used objects. To do this, right click on the window and select ***Select Favourites***. You can then transfer internal subscribers, contacts and diversions by dragging and dropping from the select window into the favourites window.

Alternatively, you can accept log entries, for example from the contacts search, by dragging and dropping directly into a favourite window.

You can use additional features with the “CTI plus” additional module:

●Changing diversions

●Lines as favourites

●EIB objects and scenes as favourites

Moving the mouse over a favourite overlays some favourite features directly as buttons. You access all executable functions by right-clicking on the context menu. The functions offered vary according to the type of favourite.

You can configure the size or automatic assignment of favourites using the ***Settings*** menu header in the context menu.

Depending on the size of the favourites displayed, more or less information will be shown (e.g. telephone number, surname, type of number, status). This information also varies according to the type of favourite created.

In the ***File/Preferences/Colours*** area, you have the option of assigning different colours for better differentiation between individual statuses.

7.1 Internal subscribers as favourites

Internal subscribers have interactive features. They change colour according to status (free, busy, called).

You can pick up calls from these internal subscribers with the appropriate privilege.

Enabled statuses, such as a diversion or Do Not Disturb, are represented in the favourites window by a diversion arrow or a red cross.

To dial an internal subscriber, just double-click the mouse or click on the button shown.

Assigning a picture to an internal subscriber

You can use the context menu to assign a picture to an internal subscriber. You only have this option if you have privilege for the corresponding telephone.

Relays and sensors

This feature is available if you have enabled the "CTI-plus package"!

In the PBX system, you can create relays and sensors as favourites, just like internal subscribers. Relays can be switched on and off and sensors can be enabled and disabled. Please note that the TK-Suite user must have the corresponding privileges on the relay or sensor subscriber to do this.

7.2 Contacts as favourites

If you have added a contact’s telephone number as a favourite, double-clicking on it dials this number immediately.

If you have added a contact’s surname instead as a favourite, double-clicking opens a context menu with all communication entries.

7.3 Diversions as favourites

This feature is available if you have enabled the "CTI-plus package"!

Diversions configured in the TK-Suite Set configurator can be switched on and off easily as favourites. The status of a diversion is also shown in the favourites.

7.4 Lines as favourites

This feature is available if you have enabled the "CTI-plus package"!

The “CTI plus” additional module gives you the opportunity to use configured lines as favourites in the PBX system. You can then monitor activity on these lines and accept incoming calls on a line by clicking the mouse.

To make an outgoing call on a given line, drag the number to the line favourite.

Alternatively, you can set any line highlighted as a favourite as a “default line”. Use the context menu of the line favourites for this.

7.5 EIB objects and scenes as favourites

This feature is available if you have enabled the "CTI-plus package"!

The “CTI plus” additional module gives you the opportunity to use configured EIB objects and scenes as favourites in the PBX system.

For switches and dimmers, the status of the EIB objects (on or off) is displayed in favourites.

8 Folders

Contacts, appointments and notes can be organised in folders. Any user can also create private folders in addition to default folders and release them for other users by allocating privileges.

8.1 Creating new folders

The menu heading ***New Folder...*** is in the context menu for each folder list. You can then assign a name and folder privileges.

8.2 Organising objects in folders

For new objects, you can select folders for which you have “Create” privilege.

You can only change an existing object’s folder if you have the “Delete” privilege in the previous folder and the “Create” privilege in the new folder.

Changing a folder in the editor

In the editors for contacts, appointments and notes, you can select the folder into which the relevant object is to be dropped.

Moving by dragging and dropping

Organising objects is easiest if you drag objects with the mouse from one folder to another in the relevant main windows. To do this, toggle as necessary into “Tabular Calendar View” in calendar view.

8.3 Modifying folders

Right click on a folder and select ***Properties...***. With the relevant privileges, you can edit folder names and change folder privileges. With system folders such as “General Folder” and “Private”, the name cannot be changed.

8.4 Colouring folders

Right click on a folder and select ***Properties/Colour...***. You can then select a colour. This setting is user-related. You can thus assign your own colour to a folder, even if you don’t have modifying privileges for this folder.

8.5 Hiding folders

You can hide any folder in the relevant folder list using the ***Hide Folder*** feature in the context menu. Hidden folders can also be restored to view via the context menu.

8.6 Special folders

The system creates a “General Folder” for every object type. The privileges for this folder can only be changed by users with “Administrator” privilege.

Each user automatically receives a “Private” folder for each object type. A “Reminders” folder is also created, in which any other user can create a new reminder appointment by presetting. The privileges for this folder can be changed by the owner as the case may be.

8.7 Folder privileges

If you have created a folder or have “Manage Folder” privilege, you can set the folder privileges. Folder privileges apply only to the folder itself and not to the content of the folder.

“Read” privilege

You will only see those folders (and the objects contained in them) for which you have “Read” privilege.

“Edit” privilege

With this privilege, you can edit objects in this folder, for example contacts, appointments or notes. This privilege implies “Read” authorisation.

“Create“ privilege

With this privilege, you can create a new object in this folder.

It is completely normal to grant this privilege on its own. The default for all “Reminder” folders provides this privilege for all users. This is how any user can create a reminder in another user’s “Reminder” folder, but cannot see its contents.

“Delete” privilege

With this privilege you can delete objects in a folder.

Where appropriate, it is normal to assign this privilege only to certain users for folders such as the “General Folder”. This is how you can avoid accidentally deleting jointly used data.

“Manage Folder” privilege

Any user who creates a folder is implicitly authorised to manage it and therefore to change the name and the privileges.

To extend this option to other users, the “Manage Folder” privilege can be assigned to them.

9 Contacts

With TK-Suite, you can organise your contact data for convenience.

If you create contacts in a folder, which is also visible to, or can be edited by, other users, changes by these users are synchronised.

9.1 Contact data

For a contact, you can complete the normal name and company fields in TK-Suite.

You can assign a photograph to each contact. TK-Suite supports the .jpg and .png file formats.

You can also create various communication entries, such as telephone numbers, email addresses or web addresses. Nor is the number restricted to pre-determined fields, and you are therefore free to enter several mobile numbers. The communication entries can be selected directly in the search results for the ***Telephony*** window.

Several addresses can also be given. Finally formatted as recipient addresses, these can then be transferred to the clipboard via the contact-context menu.

9.2 Create contacts

Create appointments via

- the ***File/New Contact...*** menu heading
- select the ***Add*** button in the ***Telephony*** or ***Contacts*** window
- Importing contacts

9.3 Editing contacts

At various positions in the TK-Suite Client, you can edit a contact using the context menu or buttons.

9.4 Deleting contacts

At various positions in the TK-Suite Client, you can delete a contact using the context menu or buttons.

9.5 Imports

You can import contact data using the ***File/Import Contacts...*** menu heading from VCard files or from .csv files.

Contact data is imported into a newly created folder.

Import VCard Files

VCard files are a default exchange format for contacts. You can also import VCard files containing several contacts. The import is made via a set field assignment.

Import .csv Files

.csv files can be selected as the export format in many applications (for example, spreadsheet). These are text files in which there is one record per line. Individual fields are separated from one another by a given symbol, usually a comma, semi-colon or a tab.

You can set the .csv file format in the Import Assistant and assign the fields in the .csv file to known fields in TK-Suite.

9.6 Exports

TK-Suite contacts can be exported in a VCard file with multiple entries, in individual VCard files or in .csv files.

To do this, mark the contacts required in the ***Contacts*** window and select the ***Export Contacts*** feature via the context menu or button.

Export in VCard File with multiple entries

With this option, the selected contacts are exported in a VCard file.

Export to single VCard Files

Because many applications only read one contact per VCard file, there is also an option for creating an individual VCard file for each contact. These are then numbered sequentially.

9.7 Contact Tasks

If a contact has been selected, a task button appears for this contact. There are some useful features which will simplify your everyday use of the telephone.

Reminder

Creates an appointment marked as a reminder, to which the selected contact is automatically linked. This is useful, for example to introduce call-back of a caller from the call log by you or by a colleague.

Meeting

Creates an appointment to which the selected contact is automatically linked.

Note

Creates a note to which the selected contact is automatically linked.

All notes for

Opens a window which displays all notes from all folders to which the contact has been linked.

10 Calendar

TK-Suite has a comprehensive calendar feature. Besides the tabular calendar view, you can use a visual calendar with day, week and month views, which makes it very convenient for creating and shifting appointments using the mouse.

If you create appointments in a folder that is also visible to, or can be edited by, other users, changes by these users are synchronised.

10.1 Appointments

Appointments in TK-Suite have the usual fields such as summary, details, start and end dates.

TK-Suite also recognises appointment types, can save a number of reminders for each appointment and link contact data to appointments.

Appointment types

Appointment

This type identifies a general appointment, for example, a meeting.

Birthday

This type automatically arranges an annual recurrence of the appointment, beginning with the start date. If you enter a birthday in a contact, TK-Suite can generate an appropriate birthday event automatically. You can then complement this with a reminder, for example.

Resubmission

This type marks resubmission appointments. This restricts the selection of potential storage folders to the special “Resubmission” folders and every TK-Suite user automatically has one of these.

This type also sets the duration of the appointment to the special value “Moment”, i.e. the start and end dates for the appointment are identical.

Reminders

This type sets the duration of the appointment to the special value “Moment”, i.e. the start and end dates for the appointment are identical. Example: Tea will be ready in 5 minutes.

Task

This type identifies the appointment as a task. A task can be assigned one of three possible statuses: “To be done”, “In progress” and “Done”. The statuses are illustrated symbolically in the graphical calendar view.

All day appointments

If an appointment lasts all day, it can be identified as an “all day appointment”. These appointments are shown separately in the graphic calendar to ensure clarity.

Reminder

You can link more than one reminder to a single contact. For example, you can set a reminder one day before it starts and another half an hour before an important appointment.

Contacts

You can link more than one contact to a single appointment. These are then offered in the context menu or as a task button, for example to be able to dial a number.

Recurrences

All appointments except reminders can be repeated automatically as recurring appointments. Birthdays are always repeated annually and the recurrence rule can be set for other appointments.

If you modify an appointment from a list of recurring appointments, you must state whether this change affects this one appointment alone or other appointments from the list. Recurring appointments will then be separated accordingly.#

10.2 Creating appointments

Create appointments via

- the ***File/New Event...*** menu heading
- the ***Reminder*** contact task
- the ***Meeting*** contact task
- select the ***Add*** button in the ***Calendar*** window

10.3 Editing appointments

At various positions in TK-Suite Client, you can edit an appointment using the context menu or buttons. You can shift and change the start and end dates in the visual calendar using the mouse.

10.4 Deleting appointments

At various positions in TK-Suite Client, you can delete an appointment using the context menu or buttons.

10.5 Subscribe to calendar

Use the ***File/Subscribe to calendar*** menu to accept a web calendar in TK-Suite. This calendar must be in the iCal format to do this.

11 Agenda

You can create an agenda as a main, sub or floating window. The agenda shows you current appointments, reminders, birthdays and To Do's.

Right click in the agenda window to set the display.

You can manipulate the scope and sequence of the data shown in the dialogue box.

12 Notes

TK-Suite has a comprehensive notes feature.

If you create notes in a folder that is also visible to, or can be edited by, other users, changes by these users are synchronised.

12.1 Notes

Notes are small text documents. You can use simple text formatting and multi-phase listings.

12.2 Link contacts to a note

As an option you can link a contact to a note. These notes appear automatically in the window which is opened via the ***Notes for*** contact task.

12.3 Creating notes

Create notes via

- the ***File/New Note...*** menu heading
- the ***Note*** contact task
- select the ***Add*** button in the ***Note*** window

12.4 Editing notes

At various positions in TK-Suite Client, you can edit a note using the context menu or buttons.

12.5 Deleting notes

At various positions in TK-Suite Client, you can delete a note using the context menu or buttons.

13 Call Log

You can view call log entries in the TK-Suite Server in the call log window. Selecting an internal subscriber is also restricted by the user privileges assigned to him.

13.1 Using call log entries

TK-Suite Client attempts to assign contacts from the contact database to numbers in the call log.

If assignment is successful, the name as well as the number is displayed and you can access all contact tasks via the contact menu.

Call-back of the number is always possible if it has been notified.

13.2 Filtering call log entries

The filter buttons allow you to restrict the range of displayed entries.

The special ***Missed calls*** button also disables the other filters temporarily.

13.3 Deleting call log entries

You can mark one or more call log entries and press the Del key to delete them.

14 Diversions

In TK-Suite Client, you can view and control the diversions set up in the configurator TK-Suite set or via the (system) telephone. Only those diversions for which you have telephone privilege are displayed.

You also make the use of diversions convenient if you create a favourite diversion in a favourite window.

14.1 Editing diversions

You can use the context menu to automatically change to the web-based TK-Suite Set configuration desktop to edit diversions.

15 CTI features

With TK-Suite Client, almost all PBX system switching features can be used on a PC. TK-Suite Client is also used as a remote control for an analogue or system telephone. ISDN telephones cannot be controlled.

You can use additional features with the “CTI plus” additional module:

- Switch to Do Not Disturb
- Switch to Call Waiting
- Display business partners directly in subscriber favourites

15.1 My Phone

This list is always bottom right in the program window.

Select here for which telephone TK-Suite Client should assume control. Telephones may be selected for which you have telephone privilege. Telephone privileges are set in the TK-Suite user administration.

If the message ***CTI dialling for subscribers not set up*** appears, then the dial-out feature through CTI for the selected telephone is not enabled. The feature can be enabled with the configuration program TK-Suite Set.

15.2 Headset

The ***Headset*** button bottom right in the program window switches dialling or call acceptance on or off via a headset. This feature is only available for system telephones.

15.3 Call Flag

Incoming and outgoing calls and connections are displayed via the call flag. The default position of this window is top left on the screen, without TK-Suite Client having to be enabled.

In this way you can run basic information and simple switching features at any time without having to change to TK-Suite Client.

Clicking on the ***Zoom symbol*** at the left edge reduces the call flag to a small square in order to view the menu or buttons behind it. Clicking on the square again restores the call flag.

Signalled calls

In addition to calls for the telephone set as ***My Phone***, calls to other telephones can also be indicated in the call flag. You can select these subscribers under Settings/Phones.

15.4 Establishing connections

Calls are connected via contacts. Contacts can be searched, can exist as favourites, be linked to appointments or be in the call log. Double-click a contact's number to dial it.

You can also set up internal calls by double-clicking on internal subscriber favourites.

15.5 Last Number Redial

There is always a last number redial button bottom right in the program window. You can also use the call log as an extended last number redial.

15.6 Automatic dialling

Automatic dialling is available to you in the call flag if a number is unavailable. Automatic dialling dials the called number at freely definable intervals of your choice, until a call is set up or the maximum number of attempts has been reached.

15.7 Taking calls

Incoming calls are signalled by the call flag. Click on the ***Take call*** symbol to take the call. You must lift the receiver first with analogue telephones.

15.8 Hang up

You can end a call by clicking on the ***Hang Up*** button.

15.9 Query

Double click on an internal subscriber favourite or on a contact's number. The call in progress will be held and a new call set up.

15.10 Call forwarding

In the call flag, you can forward a call to another internal subscriber via a menu.

15.11 Switching

You can switch between a number of calls by clicking on the subscriber symbol.

15.12 Conference

Set up a conference call between three subscribers by clicking on the ***Conference*** button.

End the conference by switching to a single subscriber or by clicking on ***End conference***.

15.13 Parking

You can park a call in progress in the PBX system. Another subscriber then has the option of retrieving the parked call. This function is useful, for example, when the call has to be put through to another colleague who has been alerted.

To enter parking, click on the button ***Park.*** Use the ***Retrieve Call*** button to exit parking.

15.14 Main system control

If you operate the PBX system controlled by TK-Suite Client under a main system, you normally have to prefix the called number with 0 to make an outside call. By setting the main system, pre-dial using TK-Suite set, this 0 is placed automatically in front of dialled numbers and removed from the front of incoming calls. This facilitates contact number storage in “natural” format (without the 0 prefix).

To call numbers in the main system, prefix the number with a “!”. This symbol bars the use of the main system prefix.

15.15 Do Not Disturb

This feature is available if you have enabled the "CTI-plus package"!

You can switch Do Not Disturb on for all internal subscribers for whom you have telephone privileges.

15.16 Call Waiting

This feature is available if you have enabled the "CTI-plus package"!

You can switch on Call Waiting for all internal subscribers for whom you have telephone privileges.

16 Chat

The Chat function provides simple communications by means of text messages. All users logged into the TK-Suite Server can exchange private text messages or send messages to a number of users.

16.1 Disable Chat

The Chat privilege can be assigned to a user in TK-Suite Server under ***Server Settings/TK-Suite Users***

17 External data sources

In addition to querying TK-Suite contact data, external data sources such as LDAP server or the local Outlook address book can be used.

For this, you need either a registered LAN module or the additional "Database Package".

17.1 LDAP

This feature is available if you have enabled the "Database package".

LDAP is an open protocol for querying directory services. One option for using directory services is the provision of contact data in the network.

There are LDAP diagrams for the data which a LDAP server provides and these describe the possible content of a record (contact). The TK-Suite Client uses a subset of the ***Persons*** diagram: Surname, telephone numbers, email and web addresses.

LDAP search

The query logic for LDAP is not implemented directly in TK-Suite Client, but is provided by ldapsearch, an external program.

Under Linux and Mac OS X, the program is usually pre-installed in the system as a component of the OpenLDAP distribution. Alternatively, sources can be found under www.openldap.org.

For Windows, a simple ldapsearch implementation is installed and this uses the available LDAP features in Windows 2000 and Windows XP. This implementation currently supports only simple authentication and cannot run under Windows 98. If you need more extensive LDAP features, replace the ldapsearch program with a more powerful version, for example OpenLDAP.

LDAP parameters

In the set-up dialogue box for LDAP, enter the path to the ldapsearch program to be used and the server on which the LDAP server is running. The `ldapsearch` default setting should work in all normal cases.

For searching for numbers and surnames, you can in each case set the fields to be searched by the LDAP server. Some LDAP implementations do not return a search result if non-existent fields are used in the search query. Separate the field names using commas.

Depending on the LDAP server used, various additional parameters are transferred to the LDAP search program. The parameter -x is pre-set for simple authentication. Set the remaining parameters to be compatible with your installation.

The TK-Suite Client always transfers the additional parameters -L (ldif format release) and -z 30 (deliver a maximum of 30 contacts) automatically.

You can obtain further information from your system administrator. If the ldapsearch program runs on the command line, it should also generate results with identical parameters in TK-Suite Client.

Search by telephone numbers

In the LDAP diagrams, there are a range of potential data types for LDAP attributes (for example a telephone number). The data type ***Telephone number*** should be used for numbers. The data type is effective for searching by content. Depending on the LDAP server implementation, an intelligent search can therefore be performed, which for example finds the number “+49521447090” if the search was for “0521447090”.

Should TK-Suite Client not find any LDAP contact for a number, although this is present, test to see if the number in the LDAP contact is entered differently, for example including the local prefix. It is possible that the number information is also operating in canonical format (see).

17.2 Outlook

This feature is available if you have enabled the "Database package".

If you are using Outlook 2002 or a later version, under Windows in TK-Suite Client, you can also set the system to query Outlook contacts. Enable this feature under ***File/Settings/Data Sources/Outlook***.

Note that Outlook sometimes outputs a warning message when email addresses are queried by external programs. This is to prevent, for example, email worms using the Outlook address book for further dissemination.

Unfortunately, it is not at present possible to bar this warning for trusted programs. You can therefore disable the email address query option if necessary.

Search by telephone numbers

TK-Suite Client tries to find a contact by using a number. For this to work in Outlook, you should enter numbers there in canonical format. This is as follows: `+CC (AC) TELNO`

`CC` is the country code, `AC` is the city/town dial code and `TELNO` is the local number. Unfortunately, this depiction is not completely standard – occasionally, for example, the leading 0 is omitted from a town dialling code.

In numbers which originate from other address sources, such as synchronisation with PDAs or mobile phones, the parentheses around the town dial code are often missing. TK-Suite Client attempts to allow for these variations during an Outlook search.

Example: Instead of 0521/447090, you enter +49 (0521) 447090 or +49 (521) 447090 or +49 521447090.

17.3 Mac OS Address Book

This feature is available if you have enabled the "Database package".

Under Mac OS X, you also have the option of searching the Mac OS address book. Enable this feature under ***Settings/Data Sources/Mac OS Address Book***.

17.4 klickTel

There is an option to run the search by surnames and numbers in klickTel Server directly in TK-Suite Client. To do this, simply enter the computer on which klickTel Server is running.

Inverse Search for Phone Extensions

If you enable this feature, names for phone extensions can also be found. To do this, figures are clipped at the end of the number until a search result is delivered. With multiple equipment connections in particular, however, this method cannot be used reliably and incorrect names are sometimes displayed.

17.5 ODBC

This feature is available if you have enabled the "Database package".

If ODBC data sources are logged in the system, you can query these with TK-Suite Client.

To do this, you can select a table from the desired ODBC data source, the fields of which you assign to the appropriate TK-Suite fields.

In order to track any problems that might arise, please note the statements in the event log (Window/Event log).

Query Excel table through ODBC

You can also register Excel tables as a data source in TK-Suite Client through ODBC. To do this, create a named data area in Excel. Now log the Excel document as an ODBC data source in system control using the Excel ODBC driver.

You can then select the data area as a table in TK-Suite Client and assign the fields.

17.6 Importing external contact data

External contacts from the search function results field can be transferred by clicking on ***Import contact*** button in TK-Suite contact.

18 Dialling from external programs

18.1 Dialling via DDE (Windows)

TK-Suite Client for Windows has a DDE interface which implements a `dial` command[1].

The `dial` command can be sent by DDE Execute via the Topic `System` through a DDE connection with the `tkphone` server. The command is structured as follows:

[dial xx,number]

The value for "xx" is ignored. The number to be dialled is used for "number".

18.2 Dialling via command line

Calling up "ctimon.exe" with the parameter "-dial number" dials the transferred number.

18.3 Dialling via URL

Under Windows, a URL process is set up via which numbers can be dialled directly from browser links. These links must have the following format:

"tksuite:<telephone number>?call"

1 This interface is compatible with the earlier TK-Soft software and therefore the description of the DDE server is also "tkphone".

18.4 Dialling via AppleScript (Mac OS X)

Under Mac OS X, you can dial numbers via TK-Suite Client from other applications using AppleScript:

```
tell application "TK-Suite Client"
        dial "0521123456"
end tell
```

19 Synchronisation

The contact, appointment and notes data are stored locally in TK-Suite Client and synchronised using TK-Suite Server.

This facilitates access to this data even without a connection to the TK-Suite Server, for example when on the move.

19.1 Synchronisation conflicts

Because a number of users can sometimes make changes to the same object through folder privilege allocations, synchronisation conflicts can occur.

In this case, the changes made by the user who has synchronised first with the TK-Suite Server are accepted on the server.

Changes made by a user who has synchronised with TK-Suite Client later, will be moved for this user into a special “Synchronisation Conflicts” folder. The current server state will then be accepted in the database of the “losing” TK-Suite Client.

A user can then resolve the conflict with a manual comparison and delete the object from the “Synchronisation Conflicts” folder. The folder is hidden automatically if it is empty.

20 Sync plus

This feature is available if you have enabled the "CTI-plus package"!

20.1 Sync plus for Mac OS X

Under Mac OS X, from Version 10.5 upwards, you have the option of synchronising appointments and contacts with the Mac OS X Sync framework.

To do this, you can set up assignments in the ***Settings*** dialogue box in the ***Sync plus*** operator between TK-Suite calendar folders and iCal calendars, and between TK-Suite contact folders and address book groups. To make an assignment, drag an iCal calendar or an address book group and drop it on to the TK-Suite folder required.

On first synchronisation after enabling synchronisation, all TK-Suite data is sent to the Mac OS X Sync framework. This attempts to discover existing data, but we recommend that you first create empty calendars in iCal and empty groups in the address book to prevent mixing it with existing data.

The data is synchronised in both directions. It is therefore essential to note that all data changes in the Mac OS X Sync framework can have effects on the TK-Suite data. In addition to the Mac OS X iCal and Address Book applications, there are also various other applications which access the Mac OS X Sync framework.

21 Profiles

This feature is available if you have enabled the "CTI-plus package"!

Profiles allow you to store settings in a file or on the TK-Suite Server in TK-Suite Client.

You can freely define the settings to be stored in a dialogue box. This means that you can create profiles which contain desktop settings, data source settings or even both.

Profiles are useful for

- securing backup settings on the server (private profile)
- simple distribution of default settings via the server (public profile)
- preparing a TK-Suite Client configuration, then to send this, say by email or USB flash drive (file profile)

21.1 Creating profiles

Select the menu heading “File/Profiles” and enable the “Create Profile” operator.

Creating profiles on the server

You can then create a profile as public (visible for all other users) or as a private profile on the server. This alternative is useful for easy access to the profile from any TK-Suite Client.

Saving profiles to file

Alternatively, you can also save the profile in a file. This file can then be sent by email, for example.

21.2 Applying profiles

If you apply a profile, all settings saved in the profile will be used in TK-Suite Client without further queries.

Applying profiles from Server

Here, you can select any “private” profile you have saved and “public” profiles you or other users have saved.

Applying profiles from file

This feature applies a profile saved earlier in a file.

You can then, for example, save a profile based on these settings on the server.

21.3 Deleting profiles from server

With this feature, you can delete profiles you have created from the server.

22 Workstation Mode

This feature is available if you have enabled the "CTI-plus package"!

This feature cannot be used in conjunction with the “Hotel Client“.

In normal TK-Suite operation, you set up users on the TK-Suite Server. Each employee then sets up his personal computer with an account with which he can then connect to this TK-Suite Server.

However, if the employee does not have a permanent workstation, this procedure is impracticable. In this situation, “Workstation mode” is a solution.

To do this, the user is created in TK-Suite Server in the normal way. Unlike normal operation, no accounts are then set up in TK-Suite Client. Instead, “Workstation mode” is enabled once by the “admin” user for each installed client.

Thereafter, after start-up, TK-Suite Client will prompt for user name and password. The appropriate desktop will then be produced according to the user name entered.

The administrator can also define on the server whether a desktop set up as a profile is stored for each login (see section 21) or whether the desktop customised by the user is to be saved.

22.1 Setting up workstation mode

To enable workstation mode, proceed as follows.

Creating profiles

- Set up a user with administrator privileges in the TK-Suite Server.
- Create an account for this user in TK-Suite Client. There should only be a single account in TK-Suite Client to set up the profile.
- Set up the desktop as you want it (for example with appropriate internal favourites, etc.).
- Select the menu heading File/Profiles and save the desired settings as a **public** profile.

Using profiles for workstation mode

- As “admin” go into the TK-Suite Server settings.
- Select the menu heading “Workstation Mode”.
- Now choose whether you want to use for a user login
    - the default desktop
    - the profile you created on first logging in
    - the profile you created on each login

Enabling workstation mode

Now you can enable workstation mode for any TK-Suite Client by selecting the menu heading File/Accounts. Here, click on the “Enable Workstation Mode” button. After entering the “admin” user’s server address and password, workstation mode is then enabled.

Enabling workstation mode deletes all available accounts. Using more than one account is no longer possible with workstation mode enabled.

22.2 Disabling workstation mode

You can disable workstation mode by selecting the menu heading File/Accounts. Here, click on the “Disable Workstation Mode” button. After entering the “admin” user’s password, workstation mode is then disabled and accounts can again be set up normally.

23 FAQ

Here are the answers to some FAQ.

What is the “admin” user’s default password?

The factory settings use the password “admin” for the “admin” user. You should change it in TK-Suite user administration immediately after booting.

How can I accept Outlook contacts?

Export Outlook contacts in .csv format. You can then accept the data in TK-Suite Client using the ***Import Contacts*** feature.