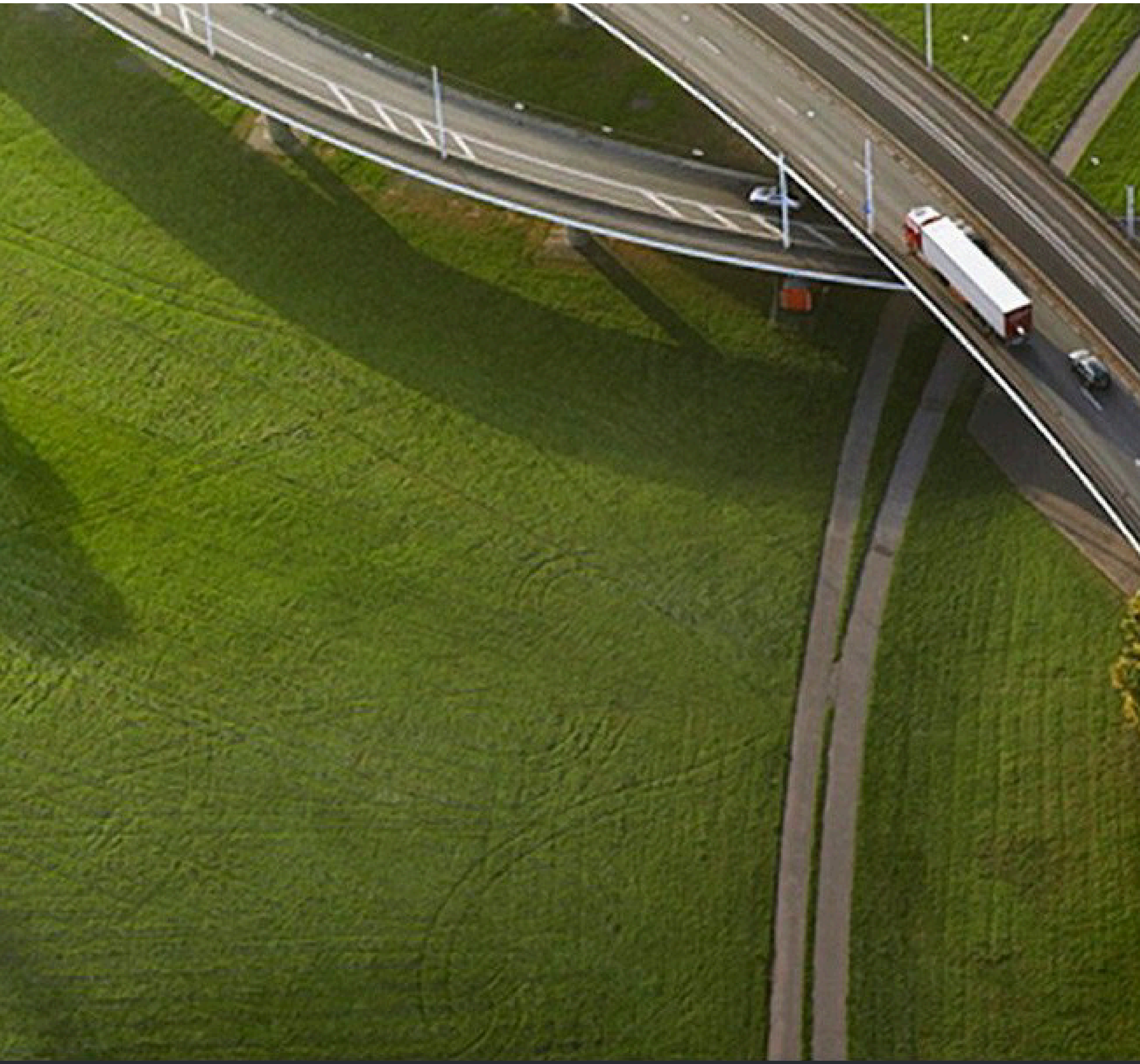

Fusion for Office
OpenScape UC Application V10

User Guide

A31003-S50A0-U109-12-7619

Provide feedback to further optimize this document to edoku@atos.net

As reseller please address further presales related questions to the responsible presales organization at Unify or at your distributor. For specific technical inquiries you may use the support knowledgebase, raise - if a software support contract is in place - a ticket via our partner portal or contact your distributor.

Our Quality and Environmental Management Systems are implemented according to the requirements of the ISO9001 and ISO14001 standards and are certified by an external certification company.

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Contents

1 About this Document

In this section we provide information about the document on hand.

1.1 Target Group of this Manual

This manual addresses:

- all users who deploy OpenScape Fusion for Office; in particular also newcomers who require information about the program interface and operating OpenScape Fusion for Office.
- advanced users who want to customize OpenScape Fusion for Office.

The instructions contain important information about using OpenScape Fusion for Office safely and correctly. Please follow them precisely to avoid operating OpenScape Fusion for Office incorrectly and to make best use of this application.

1.2 Formats and Display Forms

In the manual on hand the following conventions apply:

Purpose	Appearance	Example
Special emphasis	**Bold**	**Name** must not be deleted.
User interface elements	**Bold**	Click on **OK**.
Menu sequence	>	**File** > **Exit**
Textual cross reference	*Italic*	You find further information in the *Configuration and Administration* manual.
Path and file names	Font with fix character spacing, for example `Courier`	`c:\Program Files\...` or `Example.txt`
Specifications that may have individual content, such as variables.	*Italic* in angle brackets	Enter your <*user name*> and the <*password*> to log on to the system.
System entry and output	Font with fix character spacing, for example `Courier`	`Command not found.`
Key combination	**Bold**	**[Ctrl]+[Alt]+[Esc]**

1.3 Acronyms

Table 1: Acronyms used

Abbreviation	Meaning
CTI	Computer Telephony Integration
DTMF	Dual -Tone Multi-Frequency
FQDN	Fully Qualified Domain Name
GUI	Graphical User Interface
IM	Instant Messaging
LDAP	Lightweight Directory Access Protocol
ONS	One-Number Service
SIP	Session Initiation Protocol
SMS	Short Messaging Service
SSO	Single Sign-On
UC	Unified Communications
UM	Unified Messaging
VDI	Virtual Desktop Infrastructure
VPN	Virtual Private Network

1.4 OpenScape Fusion for Office Overview

The OpenScape Fusion for Office provides the large number of OpenScape UC features and integrates with Microsoft Outlook and Skype for Business clients. It provides in particular the following features:

- Call features
- Conference features
- Contact features
- Presence features
- Chat
- Voicemail features
- Security features
- User Profiles

In the Microsoft Outlook GUI the following features are available:

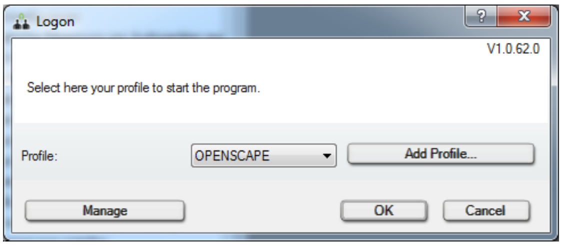
- **OpenScape Fusion** group of functions in the Main Ribbon.
- **Calender extension** for **Conferences**.
- **Embedded functions for e-mails.**
- **Outlook Contact Card** integration

2 Getting Started

2.1 Logging On

The **Logon** dialog opens immediately at the first launch of the program after the installation. In this dialog you can select or configure your user profile for logging on to the OpenScape UCApplication system.

Select the desired profile from the **Profile** combo box and click **OK**:



The **OPENSCAPE** profile exists for each user by default. You can use this profile or create and configure a new one. If you wish to use the **OPENSCAPE** default profile, you need to configure it appropriately before the first logon to the OpenScape UCApplication system.

The **Manage** button leads to the profile configuration. More details about the Fusion for Office settings are found in the Fusion for Office Administration Guide.

Any further start will follow the profile used last. To display the Logon dialog again, you have the following options:

- – Open OpenScape Fusion Settings under Unify folder in Windows Start panel, or
  – Keep shift key pressed when starting Microsoft Outlook Client or Fusion for Office.

Single Sing-On

If you have configured **Single Sign-On** for your Windows user account, the Logon process is done automatically and the dialog window is not displayed.

Emergency Disclaimer

An Emergency Calls Disclaimer might pop up, informing you that this client should not be used for Emergency calls. This message will keep appearing after each login, unless you click Accept to signify that you have read and understood this disclaimer.

2.2 Resetting your Password

In case you have forgotten your password or your account has been locked due to inactivity or to multiple failed login attempts, you can reset your password via the Fusion for Office Client.

Follow the steps below to reset your password:

Step by Step

1) On the login screen of your Fusion for Office client, click **Reset password**.
2) In the input field, enter the email address associated with your account and click **Reset my password**.
   If the email address corresponds to an existing user, an email will be delivered to your inbox, containing a password reset link.
3) Click the password reset link delivered to your email address.
   The password reset link is valid for 15 minutes. After expiration, you need to request a new password reset.
4) Enter a new password for your account in the **New password** field. Confirm your choice by re-entering your password in the **Confirm new password** field.

   The new password must have a minimum length of 8 characters and must contain at least an upper-case letter, a number and a special character.
5) Click **Save new password**.
   You can now use the new password to login to your account.

2.3 Password Expiration Notification

You will be notified that your password is about to expire via:

- An email sent to the email address associated with your account.
- A warning displayed in Extended View.

You will receive an email notification and a warning in Extended View when there is a certain number of days (10, 5 or 1) until password expiration.

An email notification will be also sent when the password has already expired. The user will continue to be notified via email until the password is reset.

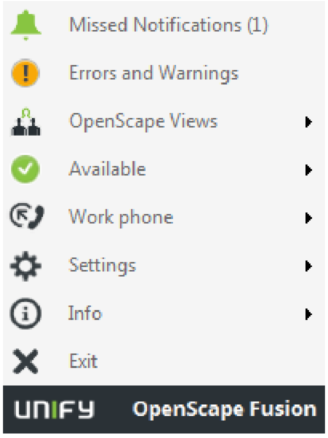
2.4 Terminating the program

In the notification area of the Windows taskbar, click on the OpenScape Fusion icon  and select **Exit**.

You are logged out of the OpenScape UC Application system. The OpenScape Fusion Client has shut down.

2.5 Fusion for Office Context Menu

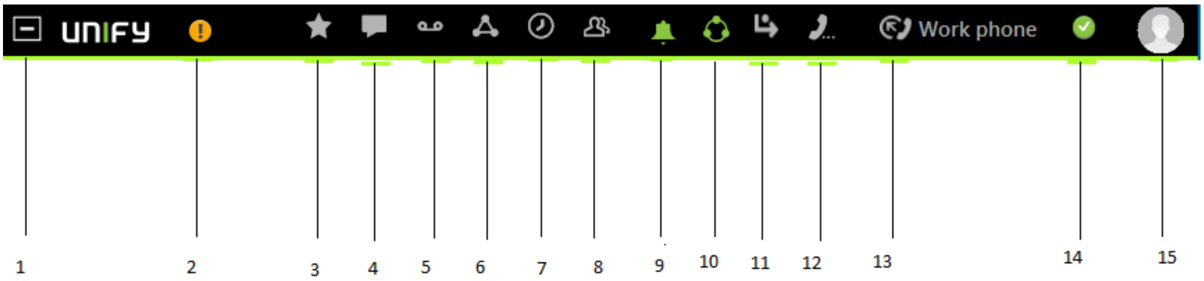
Right or left click on ton the OpenScape Fusion icon in the notification area of the windows task bar to open the context menu. This menu provides the access to all views and settings of the application:



2.6 Fusion bar

This bar can be opened automatically when Fusion starts, or can be activated from the Fusion **Systray Menu** via **Settings** > **OpenScape Views** > **Fusion bar**

From the Fusion bar you have short cuts for nearly all Fusion features. It is an alternative to the **Systray** menu.



1) You can set where you want to display the Fusion bar:

- **Top bar** - to display the Fusion bar at the top of your screen
- **Left bar** - to display the Fusion bar at the left side
- **Right bar** - to display the Fusion bar at the right side
- **Bottom bar** - to display the Fusion bar at the bottom of your screen

Also you can select two additional options from this list:

- **Auto hide** - to auto-hide the Fusion bar
- **Close** - to close the Fusion bar

2) You can check the Errors and Warnings.

This is helpful if something does not work as expected or an info that something needs your attention

NOTICE:

This icon is only displayed if there are Errors or Warnings. If everything is fine, you do not see this icon on the Fusion bar.

3) opens the Favorites

4) opens the chat board
5) opens voice mail
6) opens the conferences
7) opens the call history
8) opens the Contacts
9) Shows the notification(s) (e.g. missed call)

> **NOTICE:**
>
> This icon is only displayed if there are any notifications. In any other case it is not displayed.

10) Huntgroup

You can login / logout from the hunt group.

> **NOTICE:**
>
> This icon is only shown if you are a member of a hunt group and it has been configured accordingly. For further information please contact your administrator.

11) Forwarding and Rules

You can activate or deactivate Call Forwarding and / or create / edit / delete rules and profiles or just activate / deactivate profiles.

12) Search or dial

you can search for a contact to be dialed or enter a phone number and dial it. This button changes to green in case of an active call:

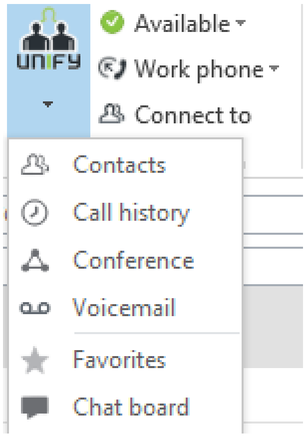
13) You can select your device
14) You can see or modify your presence state
15) You can open a further menu

From there you can

- open OpenScape UC Settings
- open the Profile (e.g. change avatar)
- activate / deactivate Call Waiting
- set Audio Schemes
- open Audio Scheme settings menu
- open Volume settings
  – Microphone
  – Ring tone
  – Speaker
- open Advanced client setting

2.7 Fusion features in Microsoft Outlook Ribbon

OpenScape Fusion for Office provides a tab with the function group **OpenScape Fusion** in Microsoft Outlook Ribbon.



In this tab you have access to the following features:

- **Presence Status**
- **Preferred Device**
- **Connect To**:

  After entering a phone number or name in this input field you can directly initiate a call or look for contact information to subsequently set up a connection. Furthermore Ad-Hoc Conference, Chat and Web Collaboration are also possible.
- Links to the following views: **Contacts**, **Call History**, **Conferences**, **Voicemail**, **Favorite Contacts** and **Chat Board**.

  To avoid a conflict between Fusion and Microsoft Teams regarding the use of the Outlook Contact card, please make sure that you have configured only one of them to access the contact card.

  This means that when the parameter `ODC_ContactCard_Enabled` is set to `true` (configured via `deployment.xml`) for Fusion to use the contact card, then the parameter `Register Teams as the chat app for Office` should be set to `false` for Microsoft Teams, or vice versa.

2.8 Audio/Video Settings

2.8.1 Audio Settings

You can select the audio device you want to use in the menu options of Fusion bar or OpenScape View header. The menu options appears when you click on the user picture. It can be selected also from Fusion **Systray Settings** > **Audio Schemes**.

A new audio device, plugged in a USB port while Fusion for Office is running, will be automatically detected. A prompt will be displayed to add this device to your **Audio Devices** list.

To configure an already registered Audio Device, navigate again in **Systray Settings** > **Audio Schemes**where you can define, among other Scheme settings:

- **Additional speaker**

  Speaker for the open listening feature. If an additional speaker has been selected here and this audio scheme is active, the indication of additional speaker is displayed in Fusion bar and OpenScape View menus.
- **Signal response**

  Speaker for the signal output (ringing)

2.8.2 Video Settings

A new video camera, plugged in a USB port while Fusion for Office is running, will be automatically detected. A prompt will be displayed to add this device to your **Video Devices** list.

To access more video settings, open the **Advanced Client Settings** from Fusion **Systray menu** > **Settings**. Select the **SIP Service Provider** > **Video Schemes**.

To define the rate for Download and Upload, open the Video resolution settings from **SIP Service Provider > Bandwidth > Network Connection settings**. For Video HD resolution, for example, it is recommended to use 1024 (640 x 480) or 2048 (1280 x 720) for both Download and Upload.

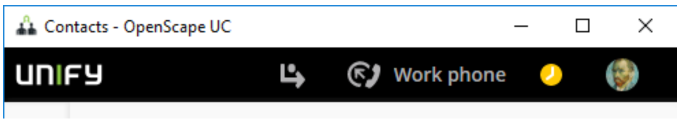
2.9 Determining your Preferred Device

Choose a phone device for initiating outgoing calls or receiving incoming calls

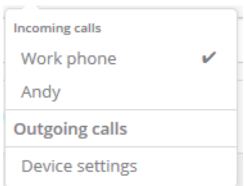
Step by Step

1)

Click on the preferred device icon  in one of the Fusion User Interfaces like the OpenScape View.



2) Select a device under **Incoming calls** and **Outgoing calls**

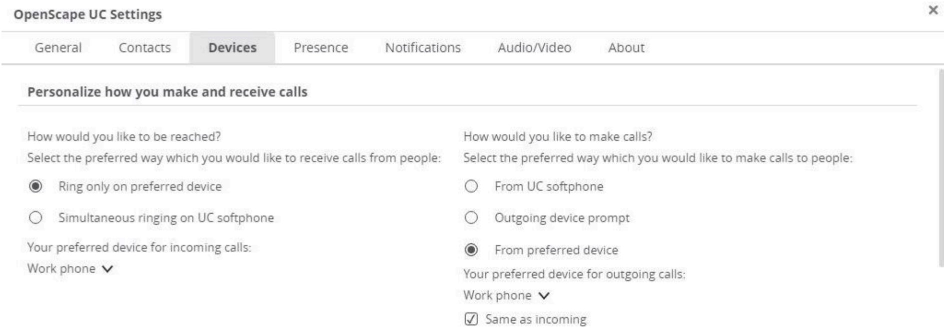


One-Number Service

The One-Number Service for incoming calls enables the direct rerouting/forwarding of a call to a definable target. Such a target may be a cell phone or the voicemail box. That means, a caller always sees the number he/she has dialed on his/her phone display and not the number of the device on which the call was actually accepted.

2.10 Options to make and receive calls

You can make or receive calls using the preferred device, the UC softclients or other devices.



2.10.1 Outgoing calls

You can make outgoing calls in three different ways:

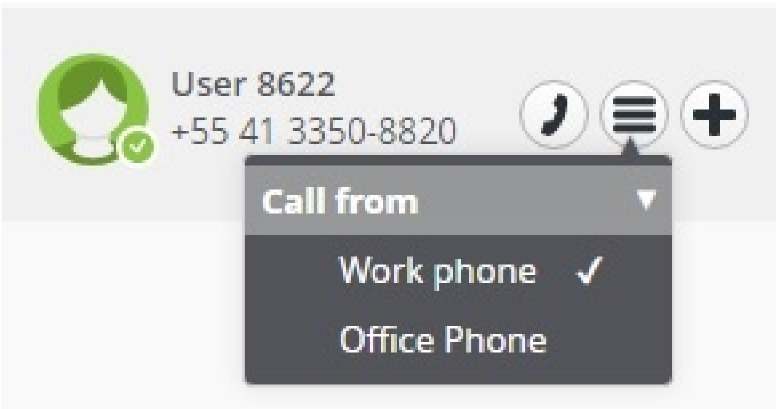
- Using the outgoing preferred device;
- Bypassing the preferred device setting and using the UC softphone device for outgoing calls;
- Choosing the device from a menu prompted for every outgoing call.

The menu prompted to choose the device for outgoing calls is only shown for the first outgoing call. Second calls, transfer calls and consultation calls will use the same device as previously chosen.

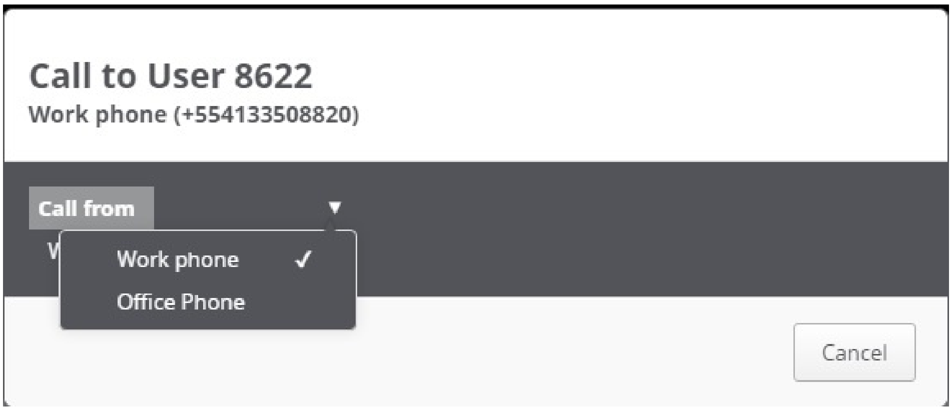
Each time the user chooses a different device in the prompt, the outgoing preferred device changes.

When choosing to make outgoing calls from prompt or from UC softphone, the outgoing preferred device menu will not be shown in the main window.

When choosing to make outgoing calls from prompt, the default menu will be displayed as in the figure below:



In case the hotkey feature is used, a pop-up window will be displayed as in the figure below:



2.10.2 Incoming calls

You have two different ways to receive calls:

- Alerting only the incoming preferred device;
- Getting a simultaneous signal on the softphone.

Using simultaneous ring, when a call comes in to the user, the UC sotphone gets an audible ring, regardless of the incoming preferred device ring. When pressing the answer button in the UC client, the call is automatically handed over to the softphone and answered.

2.11 Adding a new Device

New devices can be added to your **Preferred Devices** list at anytime.

Step by Step

1) Click on your picture/login name in the OpenScape View header bar or in Fusion bar and navigate to **Settings** > **Devices**.
2) Select **Add a new device** under **Your phones** and enter the **Device name** and **Phone number**.
3) Determine your **Ring and redirection preferences**.
4) Click on **Add device** and then click **Save**.

You have added a new device to your devices list under **Your phones.**

You can also access **Device Settings** under the **Preferred Device** option of Fusion menu in the Windows Notification bar.

2.12 Setting your Presence Status

Displaying your current presence status to other users can indicate your general communication readiness.

Click on the Presence button and select the desired presence status from the list. You can also enter you status text in the field **Change Status Text**.

The **Presence** button is found in the various Fusion user interfaces, like the **Fusion Bar**, OpenScape Views and **Outlook Main Ribbon**.

2.12.1 Managing who sees my presence

You can manage who can see your presence status via the **Managing who sees my presence** option . This can be configured in the **Presence** tab of OpenScape View Settings Menu or **Fusion Tray** > **Settings** > **OpenScape UC Settings**.

2.12.2 Do not Disturb function

You can set your presence status to **Do Not Disturb** and it will make it visible to the rest of the users that you do not want to be interrupted. Additionally, you will not receive toasters of new incoming calls, chat, and other notifications if someone tries to reach you.

This mechanism is only available when you have set as your **Preferred Device** the Fusion softphone.

2.13 Calling a Contact

You can start a call with one of your contacts from: **OpenScape Contacts View**, **Search or Dial** field of Fusion bar, or **Favorites** panel:

Step by Step

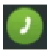
1) Enter the last name, fist name or directory number of the contact in the search field.
2) Select the contact you want to call.
3) Click on and select the directory number for the call.
4) Click on in the signaling bar:

   A call control window opens, displaying the new connection.

You can also call a contact from the **Connect To** option in Fusion tab of Outlook Main Ribbon.

2.14 Accepting a Call

Incoming calls addressed to your One-Number-Service (ONS) will reach your incoming preferred device and a signaling bar toaster will indicate that this device is ringing.

Click on  to accept the call.

2.15 Initating a Chat

You can start a chat conversation with a contact.

Step by Step

1) Hover your mouse over a contact in the contact list to see additional controls.

2) Click on.

You see the phone numbers and addresses under which the contact can bereached.

3) Click on **Chat**

The Chat Board is open and you can start typing a message.

3 Using Client Features

The information contained in this chapter helps the user to quickly familiarize himself/herself with the basic features of this software solution.

3.1 Microsoft Outlook Reading Pane

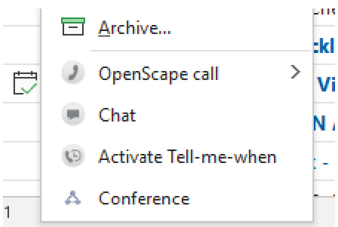
On top of email preview, Fusion buttons are available to :

- make calls
- chat
- start Web Conference with the originator (Web Collaboration)
- start Conference with the e-mail distribution list
- activate TMW (Tell Me When)

Icon	Description
	make calls
	start a conference
	Instant Meeting (Chat)
	start a Web Collaboration
	activate Tell Me When

3.2 Microsoft Outlook Context Menu

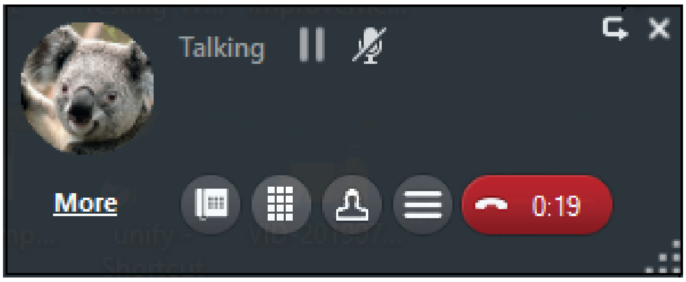
In the context menu (right click) in Outlook inbox e-mails or **Contacts**, you'll find the options to make a call, chat, tell me when and conferences.



3.3 Call Control

The **Call Control** window provides features for controlling your phone during an active call (phone call, consultation or conference) and enables dialing any phone number.

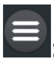
The window always opens automatically when you set up a call connection.



The Call control buttons are the following:

- **More**: **Switch Call Control view**
- :**Handover to other device**
- :**DTMF Dialing**

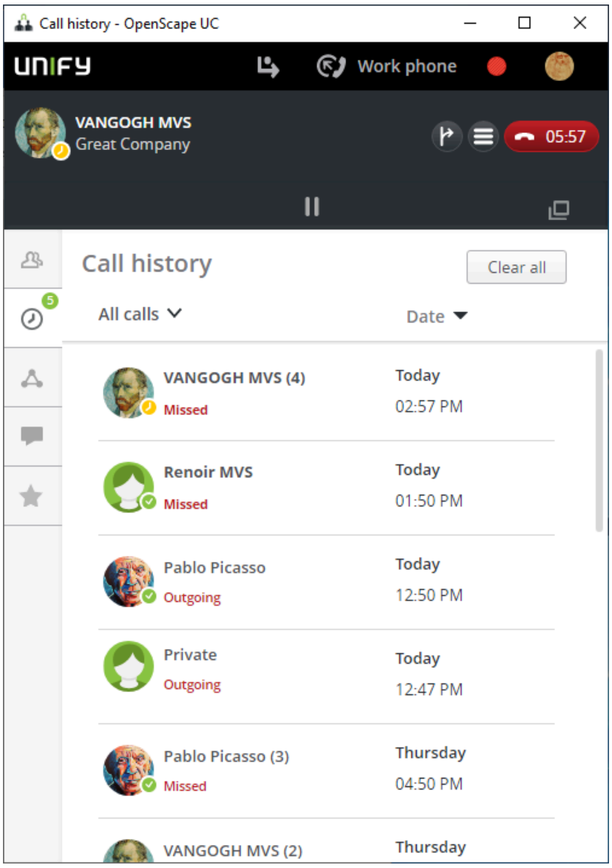
:**Consultation/Transfer Call**

- : **Menu of options**

3.3.1 Switching from Standalone view to the Extended view

Click on **More** to switch from the standalone call control view:

to the extended view:



3.3.2 Rejecting an incoming call

Click on the  button in the incoming call control bar 

3.3.3 Placing an Active Call On-Hold

During an active call you can place an active call connection on-hold and resume it whenever you wish. To do so, click  in the call control of the phone connection.

Click  to resume a held call.

3.3.4 Making a Consultation Call

While talking to a conversational partner you can connect to a second conversational partner in parallel, by either answering an incoming call or placing a call to an other user. The first call is then placed on-hold. After finishing the second call you are automatically reconnected to the first conversation partner.

You can call another person from the button in **Call Control** or directly from the **Contacts** List.

3.3.5 Alternating between Calls

No matter how many phone connections you are running at the same time, you can only conduct only one active call at a time. All other phone connections are automatically placed on-hold.

You will see two call controls, one for the active call and other for the call on hold.

In the OpenScape View, the signaling bars of the phone connections are represented as tabs. The tabs of held calls are grayed out.

hile connected simultaneously to two or more phone connections.

- Click on in the associated tab of the tab bar to connect to a held call.

  The other call(s) are automatically placed on-hold.

- Click on in the associated tab of the tab bar place a currently active call on-hold,.

  The call is placed on-hold. You are no longer connected to any of the calls.

3.3.6 Transfering an incoming call

Click on the button in the incoming call control bar. and select the person to whom you want to transfer the call to.

3.3.7 Transfering an ongoing call

During an active call:

Step by Step

1) Click on the button in the call control.

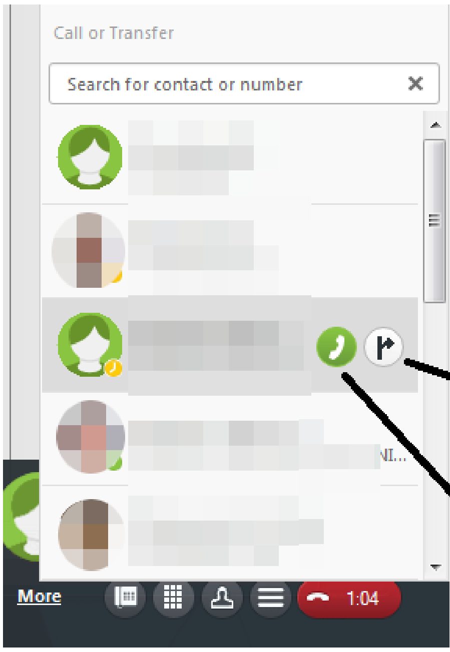
2) Select from the list: **transfer to another person.**

Example

This opens your contacts list. Next to each contact you can perform the two following actions:

- Call that specific contact

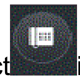
-  Transfer the call to that specific contact



3.3.8 Handing an Active Call over to Another Device

Using the call controls of this call control bar you can hand the active call over to another device without having to terminate the call.

Step by Step

1) Select  in the call control bar of the phone connection.

A menu with a list of devices is displayed.

2) Select the device for resuming the call.

The active call is being handed over.

The device rings.

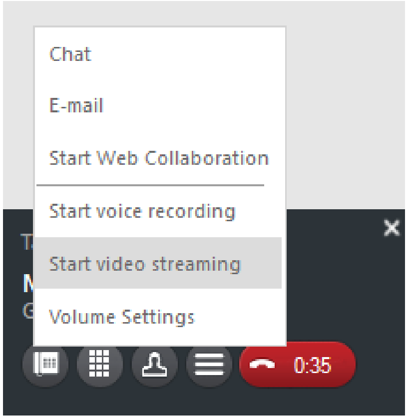
3) Accept the call on the device.

3.3.9 Initiating a Video Call (SIP only)

To initiate a video call:

Click the more options  button of the call control menu of an active call and select **Start video streaming**.

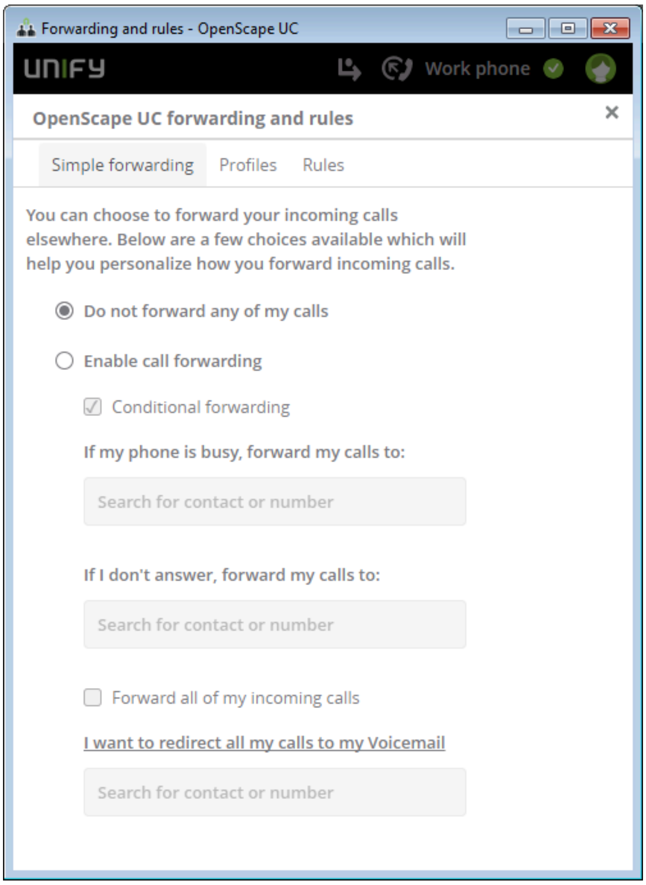
The Video window opens automatically.



3.3.10 Forwarding a Call

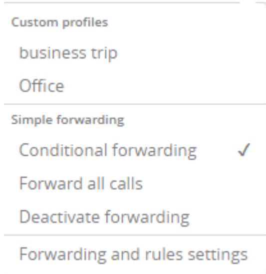
You can automatically forward a call to another device, like for example when you are temporarily absent from your workstation. Incoming calls will then not get lost and callers can still reach a conversational partner.

You reach the dialog for configuring this by Fusion systray menu **Settings** > **Forwarding and Rules** or directly from the OpenScape View tool bar button



To activate Call Forwarding.

1) Click on the menu bar or on the Fusion bar on .
2) Then in the drop down menu select the type of forwarding (**Conditional forwarding** or **Forward all calls**, in some cases only one option is displayed, it depends what you have specified in call forwarding menu)



NOTICE:

There is also the option **Deactivate forwarding**.

3.3.10.1 Call Forwarding - Configuration and Operating Options

In the dialog for a call forwarding under **Systray > Settings > Forwarding and Rules** you can select between the following options (you need to click also on Enable Call Forwarding):

You can define the type of incoming calls to be forwarded:

- **If my phone is busy, forward my calls to**

  This is also known as call forwarding on busy.

  Select the **contact or number** in the related combo box to whom the call should be forwarded in case your line is busy.
- **If I don’t answer, forward my calls to**

  This is also known as call forwarding on no answer.

  Select the **contact or number** in the related combo box to whom the call should be forwarded in case you don’t answer in a certain time.
- **Forward all my incoming calls**

  here all incoming calls are forwarded, this is also known as unconditional call forwarding.

  When you click on the check box then all the previous options are

  de-activated.

  Enable the check box before this option and select the **contact or number** in the related combo box to whom the call should be forwarded.
- **I want to redirect all my calls to my Voicemail**

  When you click on this option the field **Search for contact or number** is automatically filled with your voicemail entry.

3.3.11 Call pickup

If you are member of a call pickup group in the PBX, you may receive a call toaster every time a group member receives a call. It is displayed until the call is answered or the caller hangs up.

The names of the caller and callee are displayed if they can be found in the configured directories. Otherwise, the names are represented as "Unknown".

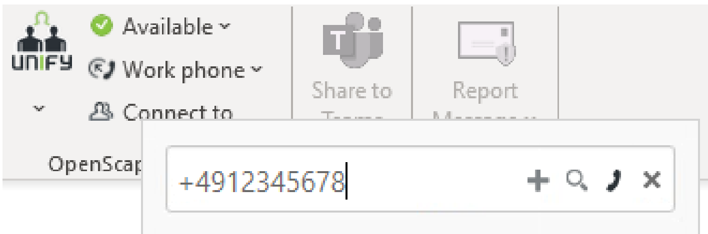
You can accept the group pickup call from the toaster or clicking on in the main menu.

3.3.12 Dialing a Phone Number (via Connect to)

To set up a connection to any phone number proceed as follows:

Step by Step

1) Click in the **OpenScape Fusion for Office** Outlook Plugin in the **Connect To**field.



2) Enter the desired phone number in the **<Search or Dial>** field.

3) Then click on or press ENTER.

The call is initiated and represented in the **Call Control** window.

3.3.13 Tell-Me-When

When the presence of a OpenScape UC user contact differs from status **Available**, you can activate the **Tell Me When** feature to receive a notification when this contact is available again.

You can reach this feature in one of the following ways:

- Via the **Communication** options of every contact, either in **OpenScape View Contacts** or in **Favorites** panel, select the **Notify when available** in **Tell me when** options. The **Tell-Me-When** dialog opens.
- Via the context of the Contact Card or e-mail.

  Right click on the Contact Card or inbox e-mail to see the **Tell-Me-When** option ..

- Via the Reading pane when you open an e-mail and click on the **Tell-Me-When** icon  .

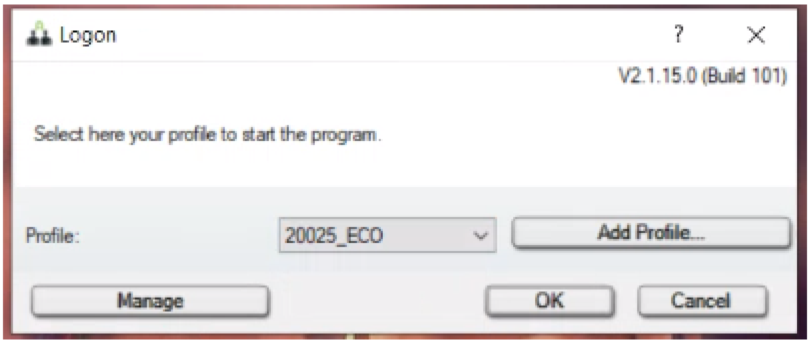
3.3.14 Activating Call waiting (OpenScape 4000)

You can enable or disable the call waiting feature.

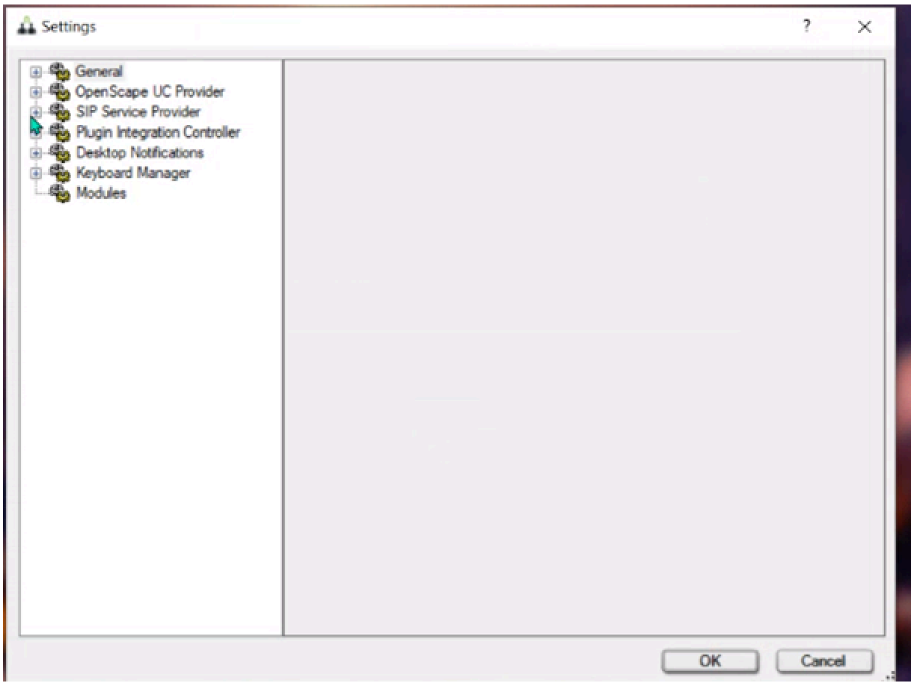
Currently available for OpenScape 4000.

Step by Step

1) Press the Shift key on the keyboard and double click on the Fusion application.
The Logon window is displayed.



2) Select a profile and navigate to **Manage** > **Settings**
The Settings window is displayed.



3) Navigate to **SIP Service Provider** > **System Services** > **.**

4) Select the option **OpenScape 4000** > **V10R1** from the drop down menu.

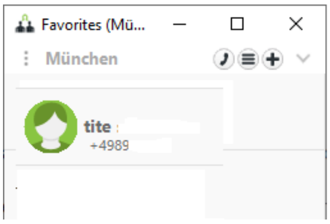
3.4 Contacts

You may have access to a public directory that contains all information to work together with users of this system. It also includes other contacts of public active directories that you may contact via phone calls, e-mails or chat. On top of this, you can create your own list of contacts by adding new contacts or by changing the information coming from these public directories.

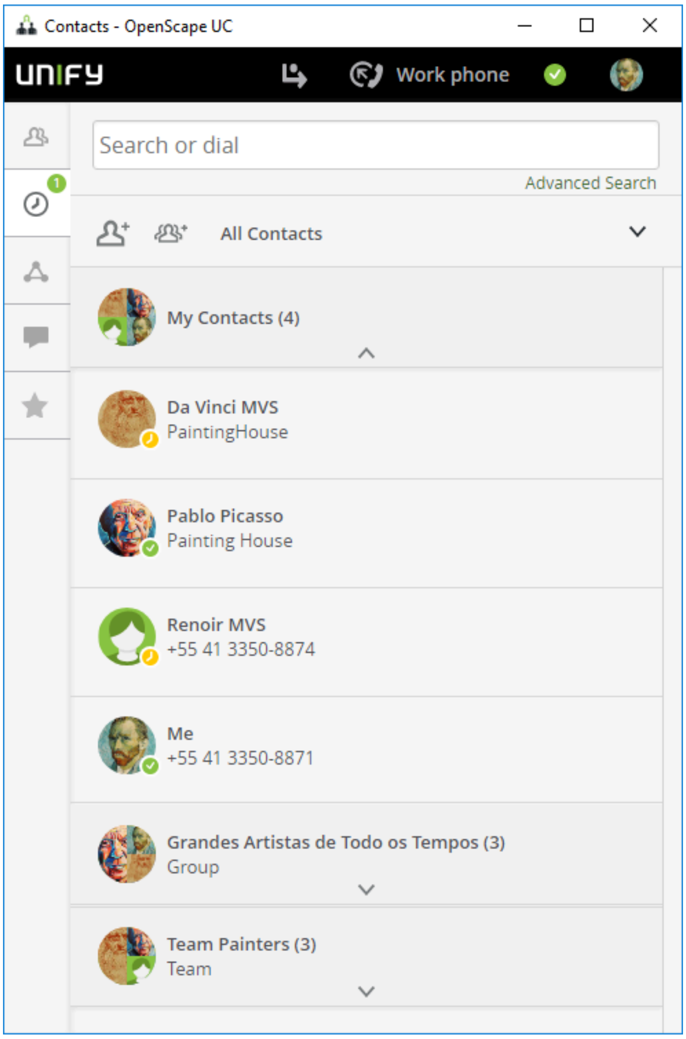
You can reach the **Contacts** window via OpenScape Contacts View by clicking on the contact icon or from the Fusion menu in Windows Systray and from Fusion plugin in Microsoft Outlook.

Alternatively you can use the **Favorites** panel via the favorites button for displaying the contacts.

From the **Favorites** panel:



From OpenScape Contacts view:



3.4.1 Creating a new Contact

You can create new contacts in the contact area. Using these contacts, you can then initiate communication relationships– for example make calls, send instant messages or start a conference.

Step by Step

1)

Click on in the contact area.

The display changes for adding a contact.

2) Enter your contact’s details.

The fields marked with asteriks (*) are mandatory

You can also:

- Select a contact image
- Assign this contact to a contact group, by selecting the group’s name under **Groups**
- fill out the video field with the **SIP URI Address** of a conference room, like the following formats:

```
sip:<user>@<domain 4989700712345@company.com
name.surname@company.com Alice@10.11.12.13
```

3) Click **Save**.

You have created a new contact. The new contact entry appears in the contact list of the **Contacts** window.

3.4.2 Searching for Contacts

Type the name of the contact you are looking for. The contacts found in the private list are automatically displayed while you are typing the text. To perform the search function in the System Directory press the icon.

If your system is integrated with MS Office 365, the contact search will also look for contacts in your Outlook Private Contacts List. The found Outlook contacts will be displayed separately, at the end of the search result.

Alternatively you can click on **Advanced Search** for performing a more specific search. It is possible to search with multiple criteria in parallel.

3.4.3 Grouping Contacts to perform group functions

You can group contacts to execute group functions, like conference calls and group chat.

Select the contacts with the **+** button via the action bar. Click the button to open the action menu and select what group function you want to initiate.

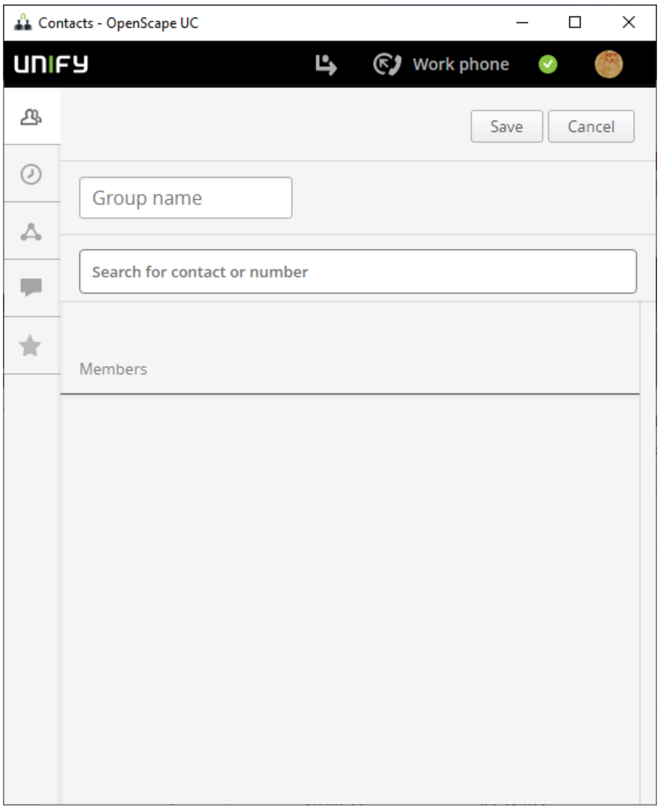
3.4.4 Creating a new Address Group

To add a new address group to your **OpenScape Fusion for Office** contact list proceed as follows:

Step by Step

1) Click on and in the **Contacts** tab and select **Create new Group**.

   The following mask opens:



2) Enter the group name and use the **Search for contact or number** field to add contacts to the group.
3) Click on **Save**

You can now select this group under the entered name in the combo box of the **Contacts** dialog.

It is also possible to create a group from the **Favorites** menu.

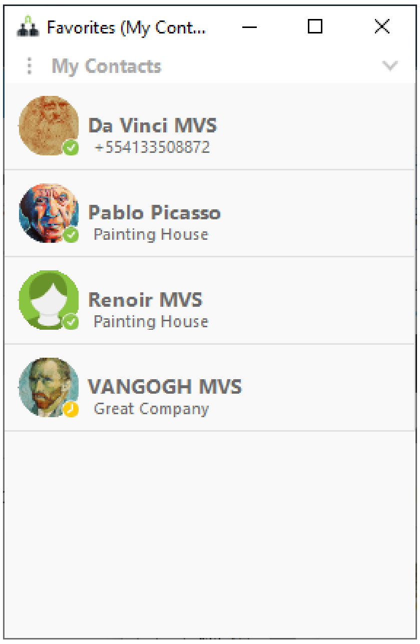
3.4.5 Assigning an Address Group to a Contact

Step by Step

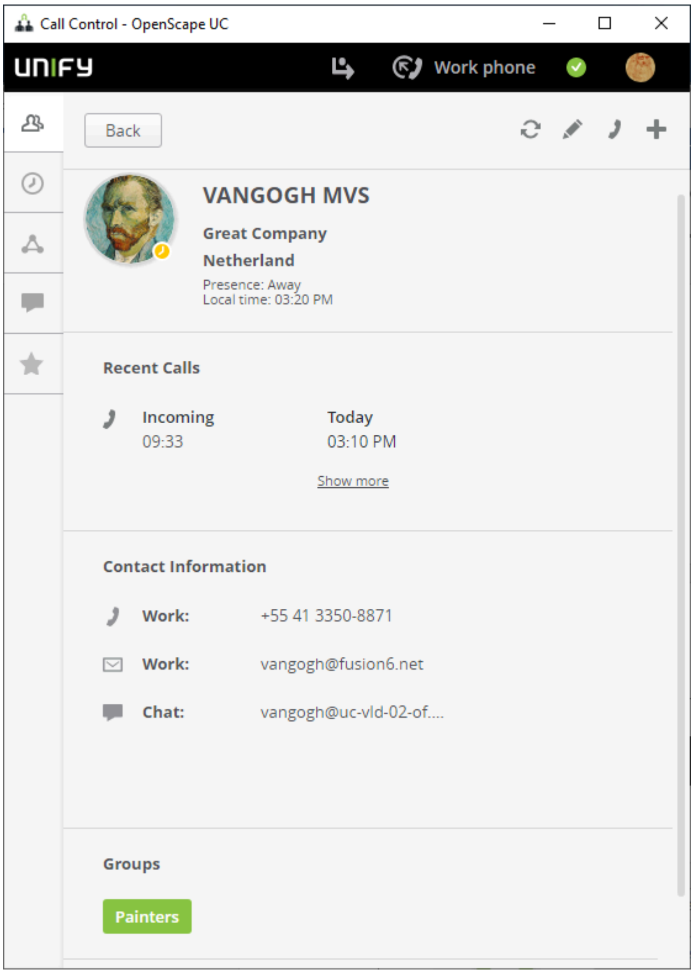
1) Click on the contact you wish to assign to a group.
2) Under **Groups** you see the available groups. Click on the group or groups (When you click on them they are high lighted in green).

3.4.6 Display Contact Details via Favorites

Open the Favorites (You reach the Favorites e.g. via the **OpenScape Views** > **Favorites**)



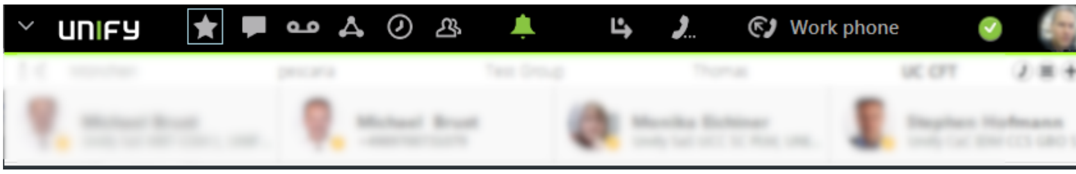
Left click on the contact (e.g. Da Vinci MVS) and the details open.



3.4.7 Working with Favorites

In the Favorites bar the following features are available:

- You can dock your **Favorites** on the Fusion tool bar.
- The Group of Contacts can now be selected by tabs, displayed either as a Standalone window or in docked horizontal view (on top or bottom Fusion bars). It is also possible to be docked to the right or left Fusion bar, and in this case the group selection is a drop down menu.



- You can switch between hiding or displaying the **Favorites** bar by pressing the in the top left of the bar.
- It's also possible to Add a Group, Add a Contact or Search for Contacts through the Favorites menu.
- The Favorites bar can be displayed in three different modes:
  - Detail: Displaying names and basic info like work phone number, etc.
  - Compact: Displaying just the names of your Favorites contacts.
  - Pictures: Displaying the avatars and names of your Favorites contacts.
- When **Favorites** is docked to Fusion Bar (only top or bottom), it is possible to choose how many rows (2, 4 or 6) of group/team contacts are displayed.
- You can change the order that groups/teams appears in **Favorites** and to hide groups/teams from **Favorites** display.

3.5 Team Feature

Using the OpenScape UCApplication team feature you can group OpenScape users to teams. The Team feature allows every member of a team to pick up a call of every other colleague in the same team.

Teams may also be created and managed by the OpenScape UCApplication administrator.

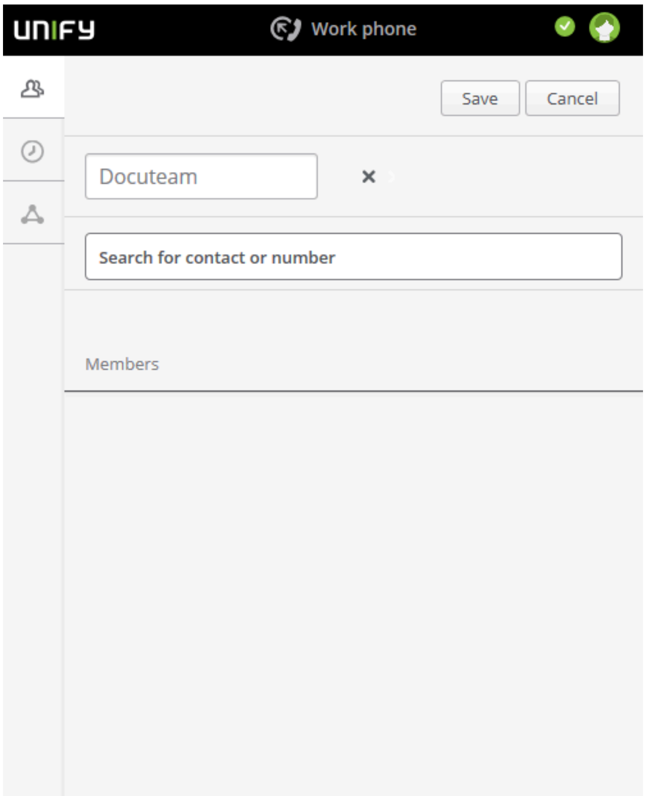
3.5.1 Assigning a new Member to a Team

To add a new member to a team you created:

Step by Step

1) Hover your mouse over a team, click on the  and select **Edit Team**

The following is displayed:



2) Under **search for contact or number** enter a name or number.

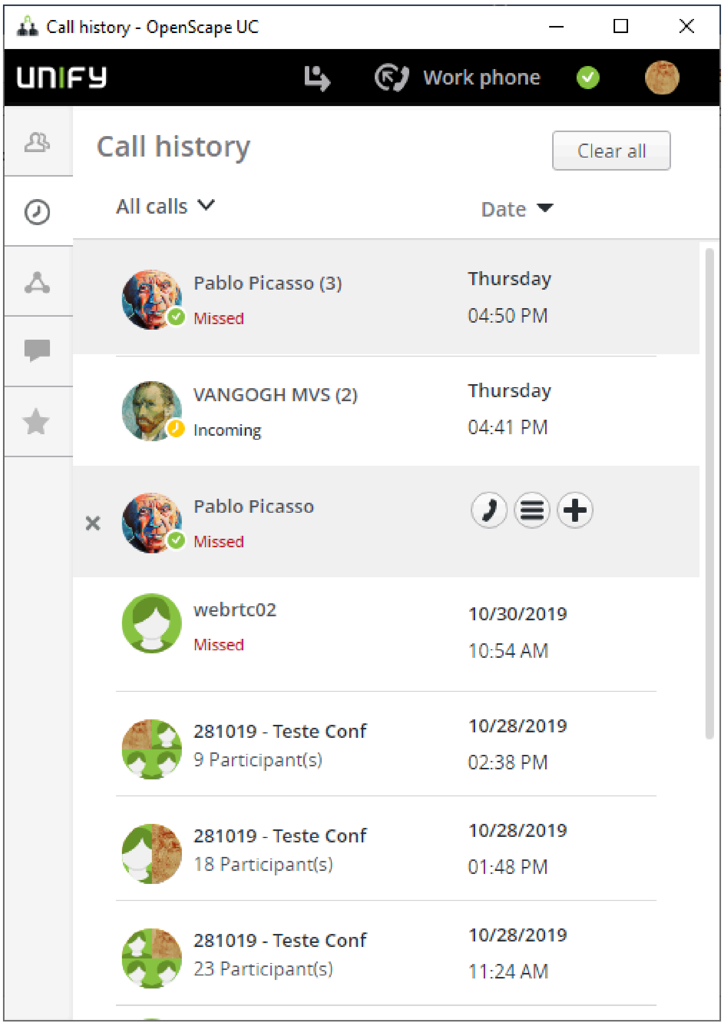
3) Select a contact and click **Save**

The privileges **Monitoring of the own Device** and **Journal Accessibility** are not automatically granted with integration in the team. The team member decides which privileges to grant to the other team partners.

3.6 Call History

You can see the history of your calls in the **Call History** tab. Each call is logged here, with the following information:

- Connection type (incoming, outgoing, accepted, missed)
- Date and time
- Phone number of the caller / callee
- Further phone numbers in case of a forwarding
- Further information about the caller or callee – for example name or presence status



3.7 Multi Line Hunt Group

You can use the softphone for Multi Line Hunt Group (MLHG) as One Number Service (ONS).

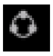
Fusion can be connected to OpenScape Voice or OpenScape 4000. However, the following apply regarding this feature:

Fusion connected to OpenScape Voice, supports:

- Stop at me / Resume
- Login / Logoff

NOTICE:

The state of the MLHG busy feature on the physical devices is opposite to the state displayed on the UC clients (Web Client, Desktop App, Fusion for Notes and Fusion for Office):

Feature activated / deactivated	MLHG busy state	UC client meaning	Led on physical device	UC client UI
Activated	Busy	Logged off	ON	
Deactivated	Not busy	Logged in	OFF	

NOTICE: WebClient, UC DeskApp and Fusion does not support the OSV feature “Reverse Hunt Make Busy LED Display”.

Fusion connected to OpenScape 4000, supports:

- Login / Logoff

In order to indicate the status of the MLHG an icon is displayed on the Fusion bar.

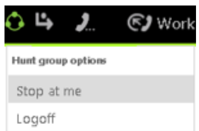
You can login / logout of the hunt group clicking on the Fusion bar.

NOTICE:

The Fusion bar opens when you either double click on the Fusion icon in the task bar or if you go via **Settings** > **OpenScape Views** > **Fusion bar**

Options when available

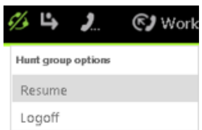
When you are logged into the hunt group and you are available you have the following options by clicking on the icon :



- Stop at me (OpenScape Voice)
- Logoff

Options when status is available but set to busy

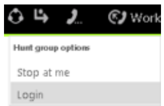
When you are logged into the hunt group and you are available but set to busy you have the following options by clicking on the icon :



- Resume (OpenScape Voice)
- Logoff

Options when status is logged off

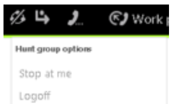
When you are not logged into the hunt group you have the following options by clicking on :



- Stop at me (OpenScape Voice)
- Login

Options when status is no manual changes allowed

When you are logged into the hunt group but no manual changes are allowed you have the following options by clicking on :



- Stop at me (OpenScape Voice)
- Logoff

3.8 Conferences

The OpenScape UC Application supports the following conference types.

- Ad-hoc conferences
- Persistent conferences
- Scheduled conferences
- Device-controlled conferences (Large Conference).

NOTICE:

Participants that join a UC conference only with audio, will listen to a "Your phone is now muted/unmuted" message, when they mute or unmute their device.

3.8.1 Creating a Conference

You need to start a conference so that participants can dial into and join. Moderated conferences can be started by a moderator only.

Step by Step

1) Click on in the navigation bar and move your mouse pointer to the conference

2) Click on .

3) Click on in the signaling bar and follow the announcements of the conference portal.

3.8.2 Creating a Scheduled or Persistent Conference

You can create persistent or scheduled conferences. Scheduled conferences will be active throughout the configured time and duration.Persistent conferences can be started anytime. After this type of conference has come to an end, it remains configured and can be restarted.

Step by Step

1) Click the button next to a selected contact.

The contextual action bar opens automatically. All further contacts are added via the action bar directly.

2) Click on in the action bar and select **Create a conference**.

You can also create a conference via the **+ New Conference** option in the **Conferences** panel.

3) Configure your conference settings:

- **Moderated Conferences**: Only moderators can start the conference and control it, share a screen with other participants and stream video. .

  The moderators are defined via a flag in the Participants List when a conference is created or edited by the creator.

  A moderator role can also be assigned by a Moderator to another participant during a running conference. Go to the Conference Participants List View select an Active Participant and click on to see the option **Add as Moderator**. This role is valid only during the period the conference is running and cannot be given to guest users.

  For guest users, there is the **media sharing** option that can be assigned by a moderator, enabling the video and screen sharing capabilities.

  NOTICE:

  In case the OpenScape UC is deployed to use **Individual Video View Layout**, even in moderated conferences, all participants can share a screen and stream video.

- **Set a time for Conference**: Use the option to define a Scheduled Conference. If this option is not used the Conference is set by default as Persistent.
- **Participants List**: To select the Conference participants and the following settings:
- **Moderator Flag**: You can define who is moderator, in case of moderated conferences,
- **Device**: Define in which device the participant will be called in case of **Dial Out Conferences**.
- **Call In/out**: Call Out participants will be automatically called when the conference starts. The Call In participants have to dial in to the Conference to participate.

4) Click on **Create**.

3.8.2.1 Scheduled Conferences from the MicrosoftOutlook Calendar

OpenScape Fusion for Office includes OpenScape Calendar Extensions for Microsoft Outlook.

It provides features in *MicrosoftOutlook* that let you plan Scheduled conferences via meeting request in the MicrosoftOutlook calendar. Such conferences comprise of Audio, Video and Screen sharing conferences:

When the conference extensions are installed, the button

Add OpenScape conference

is displayed in the toolbar of the dialog for scheduling an appointment.

The conference is performed via the OpenScape UCApplication server.

Conferences created via OpenScape Extensions for Microsoft Outlook are also displayed in the OpenScape Conferences View.

Once a Conference is created, two more buttons are available to modify and delete the created conferences.

3.8.2.2 Delete Conference via Outlook

Deleting conferences you created via the OpenScape Extensions for Microsoft Outlook.

To delete conferences you must take one of the actions proposed below to prevent "orphaned" conferences from being displayed in the OpenScape Desktop Client Enterprise Web Embedded Edition or in the OpenScape Web Client conference lists. "Orphaned" conferences are conferences to which no appointment is assigned anymore after they have been deleted from the Microsoft Outlook calendar. "Orphaned" conferences in the OpenScape Desktop Client Enterprise Web Embedded Edition or in the OpenScape Web Client may result, for example, from the following delete actions:

- Deleting a conference entry from the Microsoft Outlook calendar main view.
- Deleting a conference entry via the calendar access of your mobile device.
- Deleting a conference entry via Outlook Web Access (OWA).

To delete the conference created via the OpenScape Extensions for Microsoft Outlook without leaving "orphaned" conference entries in the OpenScape Desktop Client Enterprise Web Embedded Edition or in the OpenScape Web Client you must first open the corresponding conference entry with a double-click. Subsequently, you have two options to delete the conference entry successfully:

- You can delete the conference via the opened conference entry by pushing the Delete OpenScape Conference button.
- Use the delete functions in Microsoft Outlook (menu **File** > **Delete** or in the toolbar).

3.8.3 Initiating an Ad-hoc Conference

Start an ad-hoc conference with contacts from your contact list.

Step by Step

1) Click the button next to a selected contact.
2) Select further contacts and click on . in the action bar
3) Click on in the signaling bar

The conference is set up and a call control bar is displayed.

3.8.4 Initiating a Web Collaboration

Before participants can dial into a scheduled or persistent conference, it must be started. Moderated conferences can only be started by a moderator.

Click on in the signaling bar. Depending on how your system is deployed, the functionality can be one of the two modes below:

a) The file of the OpenScape Web Collaboration participant module will start downloading in your web browser. Open this file once finished downloading to start the web conference.

b) The options to select the screen you want to share will be automatically displayed without the need to download any file.

If another conference participant starts screen sharing, a screen sharing window is automatically open for you to see the contents.

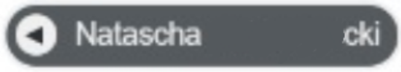
3.8.5 Using Mouse Pointer and Comment Pointer during WebRTC Screen Sharing

In case your UC system is deployed with WebRTC Screen Sharing, you can also use the mouse pointer or comment pointer features.

The screen sharing presenter must use the UC Desktop App or Fusion for Office Clients to enable other participants to point or to provide comments to the shared information.

The presenter has to share the entire screen to select the option to enable or disable the mouse pointer. This will enable both the mouse pointer and comment pointer features.

All conference participants, on any client, can click on the screen to draw attention to a specific point of the shared screen. The clicks are shown to all other conference participants alongside their names, as displayed in the figure below:



All conference participants, on any client, can also press the `Ctrl` key on the keyboard and click on the screen to add a comment in a specific point of the shared screen. Participants can use the comment pointer functionality to insert comments with text or emojis in specific parts of a presentation. The comments are shown to all other conference participants alongside their names, as displayed in the figure below:

3.8.6 Requesting Desktop Remote Control during WebRTC Screen Sharing

As a conference call participant, during a screen sharing session, you can request remote control from the presenter.

Prerequisites

A conference participant is sharing entire screen.

The conference participant sharing the screen must be using the UC Desktop Application or Fusion for Office.

Step by Step

1) Click the button to send a request message to the screen sharing presenter.

2) The current presenter receives a prompt with a message about your request for remote control and can click to **Allow** or **Decline**.

3) If you are granted with remote control, you can now control the shared screen,

However, the presenter can stop the remote control process at anytime by clicking on **Stop**.

3.8.7 Initiating Screen Sharing

During an active call with another user, you have the option to share your screen.

To start the Screen Sharing session, click on the button. You will be prompted to select which screen to share in order to start the session. Once selected, the other party will start seeing your screen.

The other call party will see your screen sharing in the designated Call Control section. You can also have access to the Mouse Pointer, Comment Pointer and Remote Desktop Control functionalities, as described in the Conferences section. This screen sharing functionality is only available if your system is deployed to support it.

3.8.7.1 WebRTC Screen Sharing in a call to an external contact

This feature allows you to share screen information with an external contact by sending a unique URL for this purpose and a unique PIN password.

Prerequisites

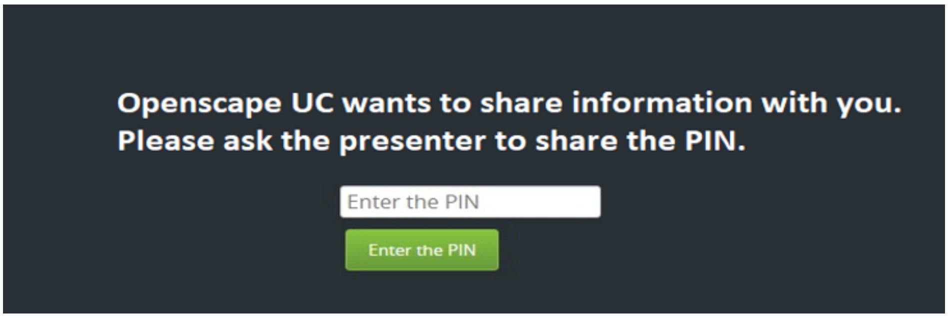
You are sharing your screen.

Step by Step

1) During screen sharing click on the button and under **Sharing Options** click on **Notification e-mail**.
A Screen share invitation email with the unique URL is generated.

2) Send the URL link to the external call participant.

Upon receiving and opening the received link, the external participant will be requested to enter the unique PIN as show in the figure below:



3) Click on the **Show PIN** option under Sharing Options from Step 1.
The PIN is revealed. Share this 6-digit PIN with your external contact. Once that external user enter the corresponding PIN they will be able to view your shared screen content.

NOTICE:

The screen share access to external participant will be canceled if the active call is set to on hold for any reason. On resuming that call, you (as presenter) will have to provide a new URL and a new PIN if you want to proceed on sharing information.

3.8.8 Conference Guest Access

If you are creating a conference, it is possible to provide a link in order to allow any external participant to join your conference. This participants are named "guests" and therefore this link is known as "Guest Access" over the internet.

A guest can join a UC conference via a WebRTC connection using the Guest Access link. In order to use the Guest Access feature you need to have the WebRTC function configured in your UC system.

For more information please contact your system administrator.

3.8.8.1 Joining a Conference using a Guest Access link

You can join a UC Web Conference anytime, whether you are a UC user or not, as long as you support the WebRTC functionality.

Step by Step

1) Open a web browser and enter the Guest Access link you have been provided with.

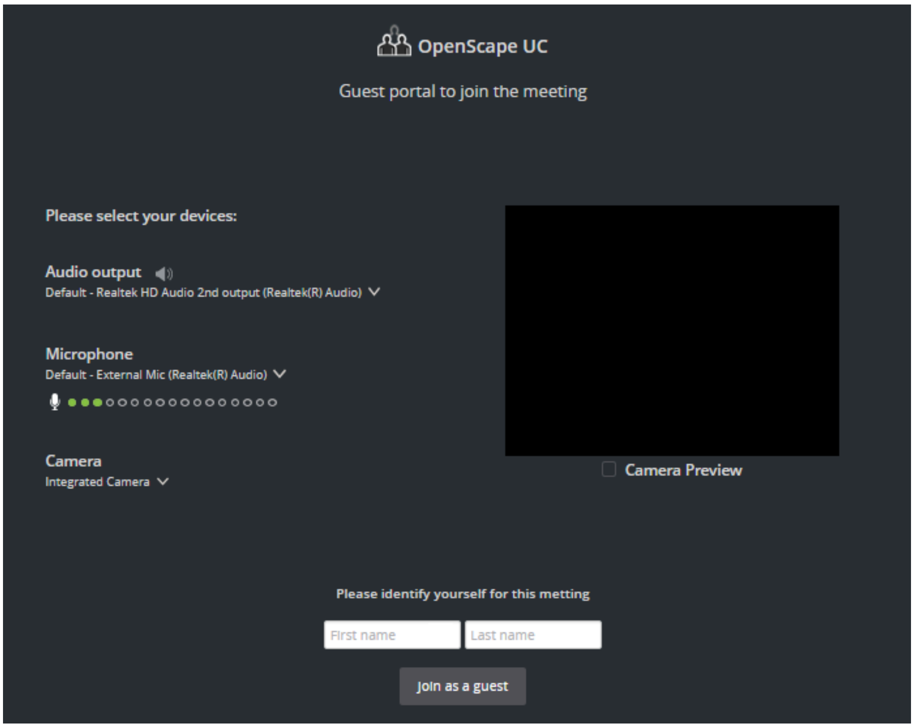
You are prompted to select how to join the conference.

The following options are available:

- **Join using your account**, for UC users.
- **Join as a guest**, for non-UC users.

2) Click **Join as a guest** for guest access to the conference.

The Guest portal opens.



3) Before joining the conference, select your devices:

a) Under **Audio output**, choose an audio devices from the drop-down list (e.g. your headset).

You can test its audio quality by clicking . A preview plays so you can hear what it sounds like.

b) Under **Microphone**, choose a devices from the drop-down list (e.g. your headset).

c) Under **Camera**, choose a video device from the drop-down list (e.g. your integrated camera).

You can test its video quality by enabling the **Camera Preview** option. A video preview displays so you can see what it looks like.

Optionally, you can select a video effect. The following video effects are available: **Blur**, **Office**, **Room**, **Shelf**, **Painting**, **Company**.

4) Enter your **First name** and/or **Last name**, then click **Join as a guest**.

You have now joined the conference as a guest and your name appears in the list of participants.

During the conference, you can change your audio and video settings at anytime. For more information, see Changing audio/video settings for guest users on page 43.

By default, guest users cannot screen media, unless a moderator gives them permissions for it. For more information, see Granting media sharing permissions to guest users on page 44.

3.8.8.2 Changing audio/video settings for guest users

During conference calls, guest users can change their audio and/or video settings at any time.

IMPORTANT: It is not recommended to change the video effect or camera settings while video streaming is running. Turn off video streaming, then do any video configuration changes.

Step by Step

1) Click at the top-right of the conference screen, next to the end call button.

2) Select **Audio and Video Sharing** from the drop-down menu.

A pop-up window opens with the audio and video settings configured before joining the conference as a guest.

3) Change the audio and video settings as you desire.

4) Click **Save**.

The audio and video configuration is updated.

Next steps

As a guest user, you can also see a camera preview while you are in a conference. To do so, click and select **Show camera preview**.

Camera preview opens in the top left corner of the conference screen.

If you have selected a video effect before joining the conference, it will be displayed by default in camera preview.

3.8.8.3 Granting media sharing permissions to guest users

As a moderator, you can allow guest users to share media during a conference call.

Step by Step

1) Click on the list of participants at the right of the conference screen and select **Guest participant(s)** from the drop-down list.

The list of guest participants is displayed (if any).

2) Hover over the participant's name you want to grant media permissions to.

The icon appears next to the participant's name.

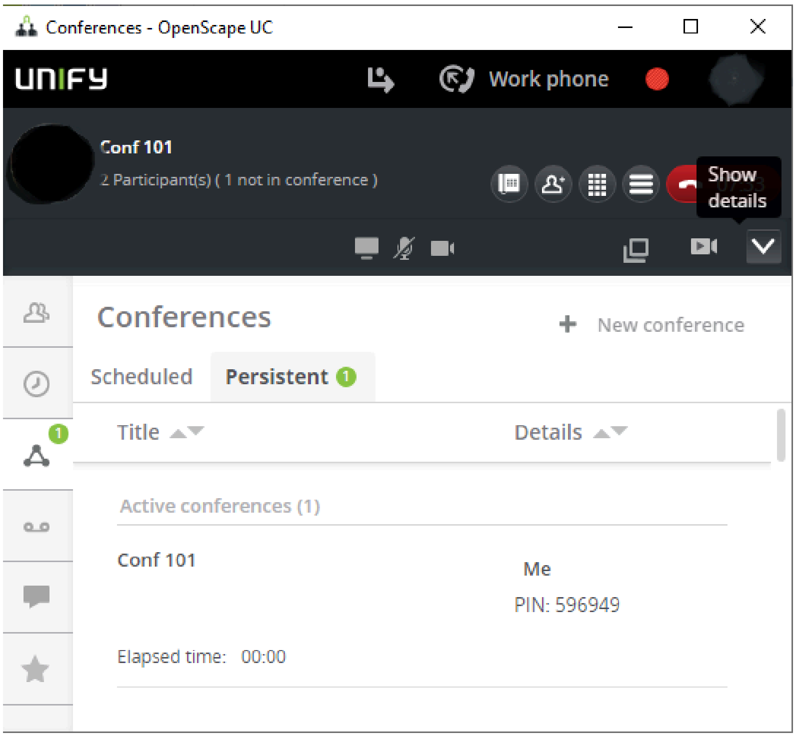
3) Click and select **Allow media sharing**.

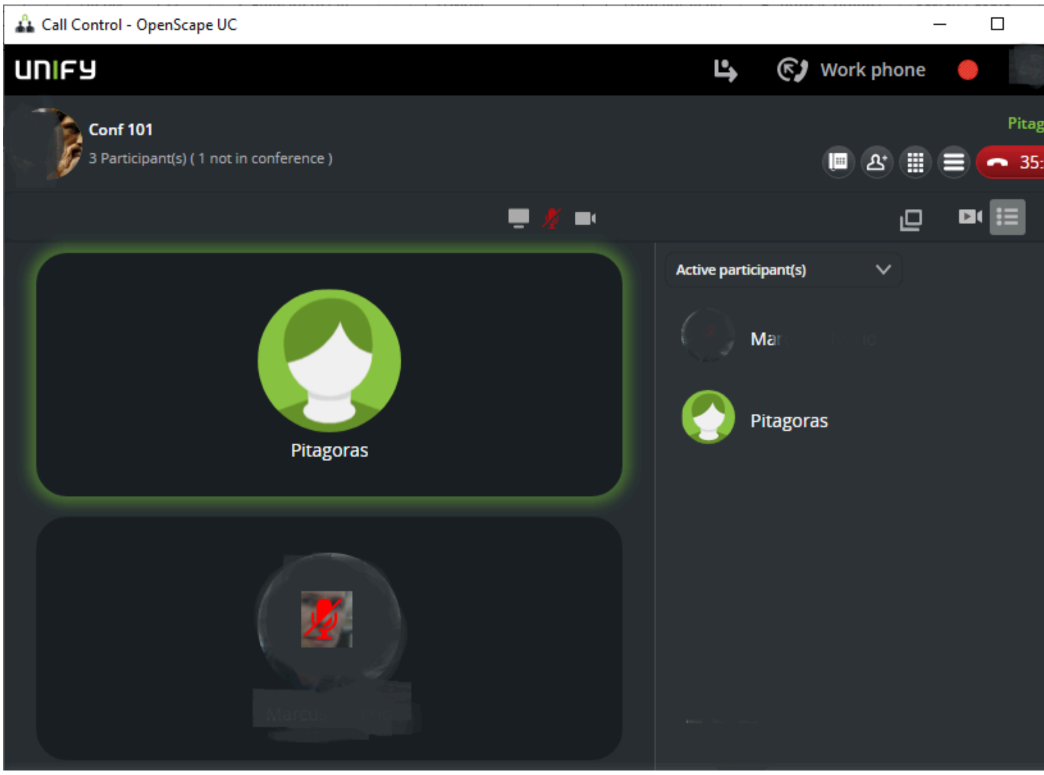
The guest user can start sharing media.

3.8.9 Conference Call Control

A conference view displays basic information like for example the number of conference participants. Using the options of the call control bar you can display further details.

Click the **Show Details** button in the call control bar of the conference connection. The call control bar extends downwards and shows the conference participants' details. The currently active speaker is highlighted.





The Conference Call control buttons are the following:

-  - Display/Hide the List of Participants
-  - Display/Hide video view of active speakers

- - Display the Only Call Control view
- - Start video streaming
- - Mute/Unmute your audio
- - Start/Stop Screen Sharing
- - Start whiteboard
- - Start chat

Conference Recording:

Click on and select **Record Conference** to start recording. You can also pause and resume the recording from the same menu or directly clicking on the recording indication buttons in the Call Control Recording... or Recording paused.

Once the conference has ended, all the participants of an open conference will receive an e-mail with the conference recording file. In a moderated conference, only the moderators will receive the e-mail.

3.8.9.1 Conference list of Participants

A list of the conference participants is displayed in the right corner of your conference screen. Click on the list of participants (e.g Active participant(s)) to open a drop down list to change the participants list options between:

- Active participant(s)
- Inactive participant(s)
- Moderator(s)

- (if the conference is moderated)each followed by their respective number in brackets.

Hover your mouse over any participant to display the mute and more options buttons.

3.8.9.2 Video view layout options

During a video conference you can adjust the video layout section according to your preferences using the video layout buttons.

These options will be available to the conference participants depending on how the system is deployed, that can be of 2 ways:

1) **Common Video View layout:** All participants will see the same video view layout.

For moderated conferences, the moderators can define what video view layout will be seen by all the participants, choosing between the Single View and Tile Based View.

For open conferences, the layout cannot be changed, and all participants will see Tile Based View.

2) **Individual Video Views layout:** Every participant can choose his own video layout.

To display the video layout buttons bar, hover your mouse over the video layout section. The video layout buttons bar is displayed on the left of your interface and includes the following buttons, that will appear depending on how the system is deployed as explained above:

- - **Single view**: Click this button to display a single participant's video screen.
- - **Active speaker view**: Click this button to display the active speaker(s) video screen.
- - **Tile based view**: Click this button to display the basic video layout in tiles.
- - **Statistics view**: Click this button to display the statistics of the video conference.
- - **Record video**: Click this button to start/stop recording the video conference.

3.8.10 Initiating a Large Conference

This is a type of conference that connects all the subscribers you are currently connected to on your terminal device.

Click on button in the call control bar of the active call. All of your phone connections are combined to a conference

3.8.11 Moving participants from a Large to Rich Conference

You can move all participants that are already talking in a voice conference (Large Conference) to a rich conference (MS Conference) in order to access additional features, such as video and screen sharing, improving the collaborative work in a longer discussion.

Prerequisites

You are in an active Large Conference

Step by Step

Click on in the call control bar of the voice conference to convert it into a rich conference..

This action moves all the participants to a rich conference room where they can now use extra conferencing features, such as, video and screen sharing.

3.9 Voicemail

3.9.1 Displaying your Voicemails

Click button in the navigation bar to show the voice messages recorded for you. To use this function, you user account needs to be configured with a voice mail service.

3.9.2 Playing a Voicemail

You can play a voicemail via your preferred device or PC.

Step by Step

1) To play a voicemail on your preferred device:

a) Move the mouse pointer onto the voicemail entry.

You see additional controls.

b) Click .and select **Play on phone**

2) To play a voicemail via your PC, click on :

3.9.3 Using the Voicemail Greeting Feature

It is possible to record greetings which are played when a call is redirected to your voicemail.

There are several greetings options available:

- **Default greetings**

  This is a system generated greeting and is selected by default. You may want to access the option **Record of Name** to record your name to be played when using this default greeting
- **Single greeting**

  This can be used to inform who is your delegate or when you are available again to answer calls.
- **Vacation greeting**

  When selecting this option all your calls are redirected to your voicemail. This also can be used to inform who is your delegate or when you are back again from your vacations.

- **Business greeting**

  It allows you to record two greetings, one to be used during your business hours and the other to be used outside your business hours. You can also specify your business hours for each day of the week.

The greetings can be defined in the **voicemail** tab under settings.

You reach the **voicemail** tab with the following steps:

1. Click on your login name (avatar) on the header bar

2. Click on **Settings**

3. Click on the **voicemal** tab

You can record, playback, download or load your greeting. Press the **Settings** button under the Greeting you want to use:

a) When you click on the microphone you can record your greeting.While the recording is active the microphone icon turns red. Clicking again on the microphone icon stops the recording.

b) When you click on the communication options icon you can select **Load from File** or **Download**.

NOTICE: Only .wav files are supported.

NOTICE: To use the **Load from file** option, the following properties are recommended: .wav File - 128 kbps bit rate, 8 kHZ sample rate, 16-bit resolution and channel mono.

c) You can click on the playback icon to hear what you have recorded.

d) When you enable the check box **Do not allow recording voice mails** the caller cannot leave a message, just here your greeting.

4. Click **Save** to save your settings.

3.10 Chat

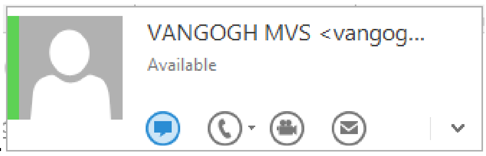
You can access the **Chat** window with the following ways:

- via Outlook Contact Card
- via Reading Pane
- via "connect to"
- Via the context menu of an e-mail in your MicrosoftOutlook inbox
- Via the context menu of a contact in your MicrosoftOutlook contact list

  To reach the context menu, click with the right mouse button on the contact in your MicrosoftOutlook contact list with whom you wish to start a chat. Selecting the **Chat** option opens the **Instant Messaging** dialog.

- Via the **Business Card IM** button

Click on the **chat** icon  button under a contact to open the chat interface.

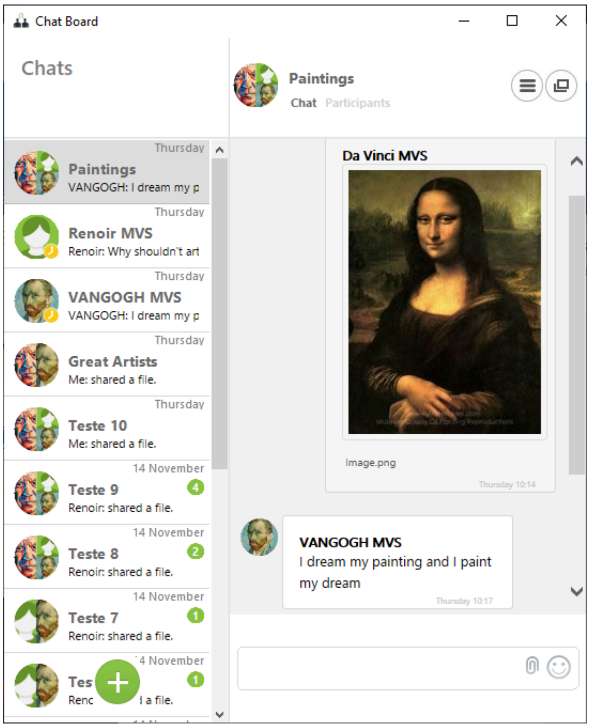


3.10.1 Chat Board

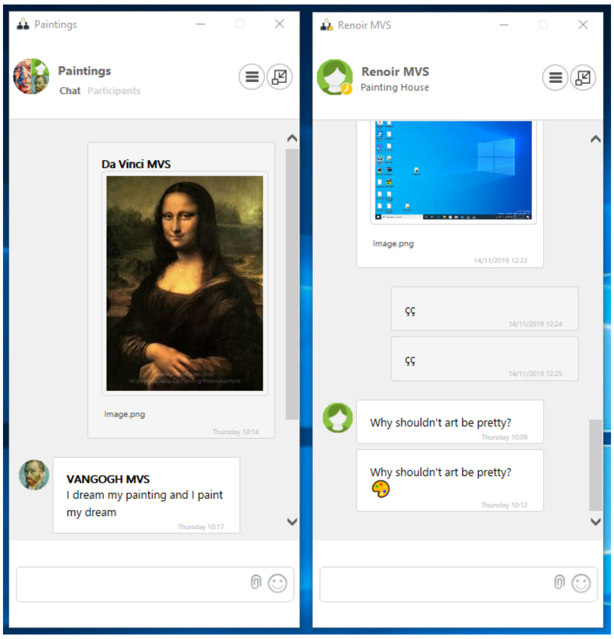
You can chat with an individual contact or with a group of contacts.

Click on the  button to create a new chat.

In an active chat conversation click on the  button to see the available communication options menu.



Click on the  button on the top right of a conversation to expand the conversation to a separate window view. Once in this view, click on the click on the small icon on the  button to switch back to the one window view (combined view).



3.10.2 Chat attachments

You can share and exchange files (e.g photos, docs, video) with the Chat attachments feature.

The following limitations apply:

- The file size a user is able to share is configured by the administrator and is by default limited to 100 MB.
- Sharing is enabled by default for the most file types. For example:
  – – PDF (.pdf)
  – PNG (.png)
  – JPEG (.jpeg)
  – GIF (.gif)
  – BMP (.bmp)
  – Text (.txt)
  – CSV (.csv)
  – ZIP (.zip, .7zip)
  – Video (.mp4)
  – Microsoft Office (.word, .xls, ppt)

Your system administrator can configure your system to support additional file types by using a white list. Contact your administrator for more details.

3.10.2.1 Sending a Chat attachment

To send a chat attachment to an other OpenScape UC Application user from your contacts' list:

Step by Step

1) Click on the button in the bottom entry area of the chat window..

   A new window opens from where you can select the file you want to attach.

2) Double click on the file that you wish to attach or select it and click **Open**.
3) Press the send button to send your attachment once the file has been uploaded on your chat thread.

3.10.2.2 Opening the Chat Images Viewer

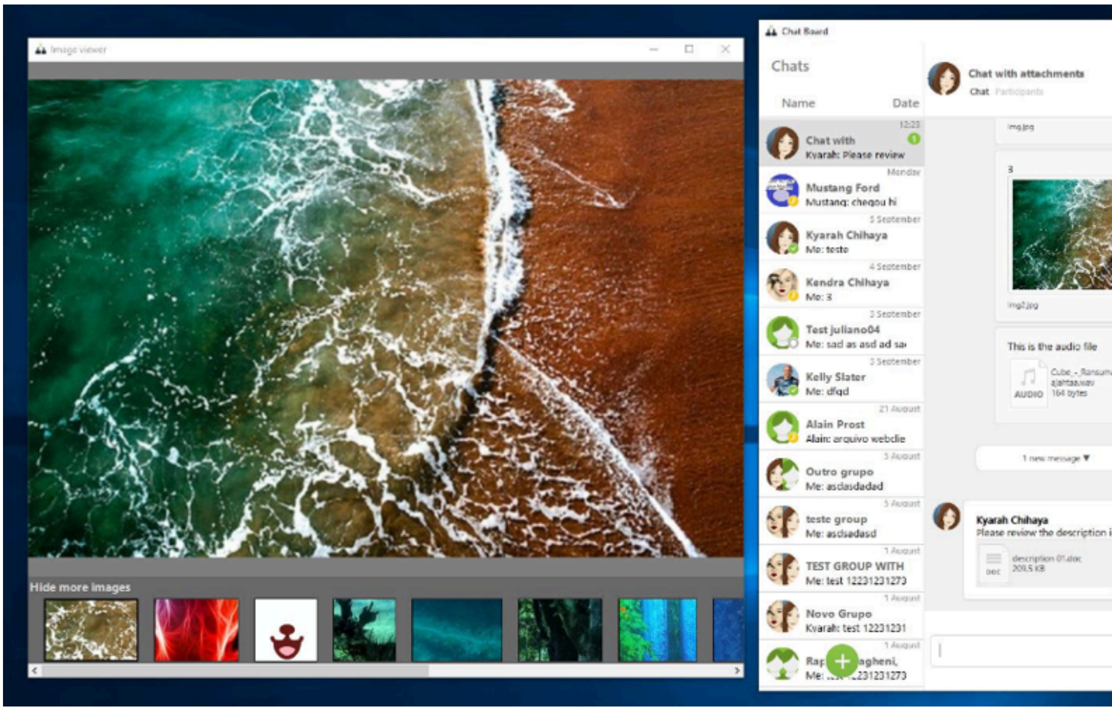
When attaching an image to a chat conversation. all chat participants are able to see a preview of the image. To open n attached image to Fusion’s native image viewer follow the steps below:

Step by Step

1) Double-click on the image in your conversation window to enlarge it in the internal viewer. In the chat internal enlarged image view, screen. :

   Other images already downloaded for this conversation are also displayed in the bottom part of the image viewer.

2) Navigate through the image files of this chat conversation by clicking on a certain image in the image view or by using your keyboard.



3.10.3 Deleting a Chat Message

To delete a chat message you have sent, hover your mouse over the message and click the icon to delete it.

The message will be removed for you and for all other chat participants.

NOTICE: The messages can be deleted only one by one.

3.10.4 Starting and using the chat in a one-on-one call

During a call with another UC user, you can use the chat panel to exchange messages, links or attachments with the other call participant.

Step by Step

1) To start the chat in a one-on-one call, click on the call control bar.

The **Communication Options** available are displayed.

Previous messages exchanged by the call participants, if any, are displayed in the chat panel.

2) Click **Chat**.
The chat panel is displayed and the call participants can start exchanging message of view older messages.

3) During the call, you can do the following actions using the chat:

a) Type a new message in the message box and send it by click the icon or pressing the `Enter` key.

b) Send an emoji, by clicking the icon displayed on the right side of the message box.

c) Add attachments, by clicking the icon, displayed on the right side of the message box.

d) Delete chat messages, by clicking **Delete** at the bottom of the message.

e) Call another UC user, by clicking .

f) Display the **Communication Options** available, by clicking :

- Add more participants to the chat.
- Send an email to the call participant/s.

g) Pin the chat, by clicking .

The following tabs are displayed in the chat panel:

- **Messages**: contains all messages exchanged by the call participants alongside their name and time of sending.
- **Files**: contains all attachments shared by the call participants.

4) After the call ends, you can view the messages and attachments shared during the call and exchange further messages.

a) Click to open the **Chat** tab.

b) Select the chat you want to view.

NOTICE:

The **Chat** tab contains a recording of all messages exchanged between the call participants, before the call and during the call. After the call ends, it is possible to send further messages or files in the chat.

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5) To hide the chat panel during a call, click on the call control bar.

The chat panel will not be displayed to you anymore. The other call participant will still be able to see it.

3.10.5 Starting, using and adding to chat during a conference call

During a conference call, guest and non-guest participants can exchange messages, links or attachments with each other.

Guest participants can use the conference chat only if a moderator adds them to it.

Only moderators are allowed to start the chat during a conference call.

3.10.5.1 Starting the chat during a conference call

During a conference call, non-guest participants can start the chat.

Prerequisites

- You are a UC user (not a guest participant).
- You have joined the conference using the WebClient, UC Desktop App or Fusion for Office.

To start the chat in a conference call, click on the call control bar.

The chat panel is displayed for non-guest participants. Guest participants will be able to see the chat only if a moderator adds them to it.

You can disable some active call panels to make the chat panel appear larger on your call screen.

3.10.5.2 Using the chat during a conference call

During the conference, participants can do the following actions using the chat:

- Type a new message in the message box and send it by click the icon or pressing the `Enter` key.

- Send an emoji, by clicking the icon displayed on the right side of the message box.
- Add attachments, by clicking the icon, displayed on the right side of the message box.
- Delete chat messages, by clicking **Delete** at the bottom of the message.

The following tabs are displayed in the chat panel:

- **Messages**: contains all messages exchanged by non-guest participants alongside their name and time of sending.
- **Files**: contains all attachments shared by non-guest participants.

3.10.5.3 Hiding the chat during a conference call

Guest and non-guest participants can hide the chat when they no longer want to see it or they want other panels to appear larger.

To hide the chat panel, click on the call control bar.

The chat panel will not be displayed to you anymore. Other participants will still be able to see it.

3.10.5.4 Adding a guest user to the conference chat

By default, if the chat has been started during a conference, guest participants cannot see or use it unless a moderator added them to it.

Prerequisites

- You are a moderator.
- You have joined the conference using the WebClient, UC Desktop App or Fusion for Office.

Follow the steps below to add a guest user to the conference chat:

Step by Step

1) Click on the list of participants at the right of the conference screen and select **Guest participant(s)** from the drop-down list.

The list of guest participants is displayed (if any).

2) Hover over the participant's name who you want to add to the conference chat.

The icon appears next to the participant's name.

3) Click and select **Add to chat**.

The chat is displayed to the guest participant selected.

Guest participants can use the chat the same as non-guest participants. For more information about actions using the chat, see Using the chat during a conference call on page 54.

3.10.5.5 Viewing chat messages after a conference ends

After a conference ends, you can view the chat messages and files exchanged during the conference.

Prerequisites

- You have joined the conference as a UC user (not a guest participant).
- You have joined the conference using the WebClient, UC Desktop App or Fusion for Office.

Step by Step

1) Click to open the **Conferences** tab.

2) Next, click **Conference Chats**.

3) Select the conference for which you want to view the chat messages and attachments.

The following tabs are displayed:

- **Messages**: contains all messages exchanged during the conference, alongside their name and time of sending.
- **Files**: contains all attachments shared during the conference.

NOTICE:

The **Conference Chats** tab contains only a recording of the chat messages and files exchanged during the conference. After the conference ends, it is not possible to send further messages or files.

3.11 Whiteboard

Whiteboard allows you to work together with other call participants by typing notes, drawing or importing images on a blank page during a conference call.

NOTICE: Only UC users are allowed to start the whiteboard during a conference call. Guest participants can use the whiteboard functionality, but they are not allowed to start it.

The following UC clients support the whiteboard functionality: WebClient, UC Desktop App and Fusion for Office.

3.11.1 Adding, editing or hiding the whiteboard in a conference call

During a conference call, non-guest participants can start the whiteboard at any time.

Prerequisites

- You are a UC user (not a guest participant).
- You have joined the conference using the WebClient, UC Desktop App or Fusion for Office.

Step by Step

1) To add the whiteboard to the active conference call, click on the call control bar.

The whiteboard is added to the active conference call.

You can disable some active call panels to make the whiteboard appear larger on your call screen.

2) To start editing, select a tool from the left side of the whiteboard.

The whiteboard tools available are described in the following table:

Table 2: Whiteboard tools

Whiteboard tool	Description	How to use it
	Download	Download the whiteboard image as PNG file and save a copy for yourself. **NOTICE:** At the end of the conference, the whiteboard image will not be saved automatically.
	Select	Select objects, resize and move them around.
	Pencil	Draw free form shapes
	Arrow	Draw arrows.
	Lines	Draw lines.

Whiteboard tool	Description	How to use it
	Rectangle	Draw rectangle shapes.
	Ellipse	Draw ellipse shapes.
	Text	Insert text.
	Image	Insert images.
	Undo	Undo the most recent change.
	Other options	Display additional options: • Set or change the background of the whiteboard. • Clear all elements in the whiteboard

When you select the **Pencil**, **Arrow**, **Lines**, **Rectangle** or **Ellipse** icons, you can choose a color and weight for the object you are about to add.

When you select the **Text** icon, you can choose the color, size and style of the text you are about to add.

In case the window of your UC client is too small to show all possible options for the whiteboard, additional options will be displayed in the **Other options** area.

All changes you make on the whiteboard are shown to all call participants alongside your name.

3) To hide the whiteboard during the active conference call, click on the call control bar.

The whiteboard will not be displayed to you anymore. Other participants will still be able to see it.

3.12 Surveys

This feature allows you to invite users to answer a set of questions and get their opinion on a specific topic.

Surveys can be distributed in one of the following ways:

- Start a survey during a conference call.

  The survey is displayed to all conference participants.
- Send a survey invitation to specific users.

  The invitation contains a link to the survey. Only the users with the link can respond to the survey.

You can do the following actions on surveys:

- Create, edit or delete a survey
- Start or stop surveys during a conference call
- Send survey invitations to specific users
- Show, print or clear survey responses

Each survey can have one of the following statuses:

- **Ready**: the survey is ready to be distributed to conference participants or to specific users via invitations.
- **In progress**: the survey has been started in a conference call or has been distributed via survey invitations.

  Responses are being collected for running surveys.
- **Paused**: the survey has been stopped and responses are no longer collected.

During conference calls, guest users are not allowed to start surveys but they can respond to surveys initiated by other UC participants.

3.12.1 Creating a survey

You can create a new survey via the **Surveys** tab.

Step by Step

1) Click in the left navigation bar to open the **Surveys** tab.

   The surveys created previously (if any) are displayed in this area.
2) Click **+ Create survey** in the top right of the screen.

   The survey creation page opens with the following two tabs:

   - The **Designer** tab that allows you to add questions to the survey using the elements available.
   - The **Preview** tab that allows you to view the survey questions and test the functionality.

3) In the **Designer** tab, start creating the survey in one of the following ways:

- Drag and drop an survey element from the toolbox displayed on the left side of the screen.
- Click **Add Question** to start creating the survey using the default survey element (**Single-Line Input**).
- Click **...** inside the **Add Question** button and select a survey element from the list.

The following survey elements are available:

- **Radio Button Group**, for questions with multiple choices, that allow a single selection.
- **Rating Scale**, for questions that allow rating according to a specified rating scale.
- **Checkboxes**, for questions with multiple choices, that allow to select one or more options.
- **Dropdown**, for questions that allow a single selection from a series of options.
- **Yes/No (Boolean)**, for questions where the only possible values are **Yes** and **No**.
- **Single-Line Input**, for questions that allow answers in plain text, on a single line.
- **Long Text**, for questions that allow answers in plain text, on one or more lines.

4) Configure the survey:

- Enter a custom title for the survey in the **Survey Title** field.
- Enter a short description of the survey's purpose in the **Description** field.
- Click to browse for and upload a survey logo.
- Configure the questions and pages of the survey.

  Each survey can include multiple pages, with one or more questions on each page. To reorder or move questions to a different page, drag and drop the questions in the desired location.

  You can mark survey questions as mandatory by switching the **Required** slider to ON (orange).

  You can use questions previously created as template for new ones by clicking the **Duplicate** button.

  If you want to change the type of a survey question, select another element from the drop-down list displayed in the bottom-left corner of the question.

  For extended survey features, click to open the survey settings tab on the right side of the screen. Depending on the element type, different sections are displayed in this area, allowing you to edit the survey's general settings, configure the logic, layout, data and validators for the survey's questions.

5) Optionally, you can navigate to the **Preview** tab to view the questions and test the functionality.

   In this area, you have the following options:

   - Click to preview the survey on different screen types and sizes.
   - Click to preview the survey elements in portrait or landscape orientation.
   - Click to show or hide invisible survey elements.
   - Click to preview the survey elements in the default or modern theme.

6) Once you finish configuring the survey, click **Save** in the top right of the screen.

The newly created survey is displayed in the **Surveys** tab and it is in the **Ready** status.

3.12.2 Editing a surveys

You can edit an existing survey via the **Surveys** tab.

Step by Step

1) Click in the left navigation bar to open the **Surveys** tab.

   The surveys created previously are displayed in this area.

2) Locate the survey you want to edit and click the button displayed on the right side.
3) Select **Edit** from the drop-down list.

   The survey questions and settings are displayed.

4) Edit the survey questions and settings according to your needs.
5) Once you finish editing the survey, click **Save** in the top right of the screen.

The changes you made are saved and the survey is in the **Ready** status.

3.12.3 Starting a survey during a conference call

During a conference call, you can distribute one or more surveys to the participants to get their opinion on a specific topic.

When a survey is started, a pop-up window is displayed to all participants and they can answer the questions.

It is possible to start a survey multiple times during a conference call. The survey is displayed to all participants every time the survey initiator starts it.

When you select to start again a survey for which responses have already been collected, you must confirm that you want to redistribute it. You have the following options:

- **Yes, collect more responses**: the survey is displayed again to all participants and the new responses are recorded along with the previous ones.
- **Yes, clear all responses and continue**: the survey is displayed again to all participants. The responses collected previously are cleared and new responses are collected.
- **No**: the survey redistribution action is canceled.

When a survey is started during a conference, it will be displayed to participants who are in the call at the time of the distribution and to participants who join the conference at a later point.

It is only possible to run one survey at a time during a conference call.

Follow the steps below to start a survey during a conference call:

Step by Step

1) Click on the call control bar.

2) Select the survey you want to start from the list of surveys.

A message is displayed asking you to confirm you want to start the survey selected.

3) Click **Yes**.

The survey is displayed to all conference participants and they can start answering the questions.

> **NOTICE:** Participants who do not want to take the survey can click the **Close** button at the bottom-right of the survey window. A pop-up message is displayed asking for exit confirmation, then the survey is no longer shown.

When a survey is running, the survey icon on the call control bar turns green.

The survey initiator can stop a survey at any time, by click the survey button again and selecting **Stop survey**.

3.12.4 Sending survey invitations

You can invite users to participate in a survey by sending an email invitation, containing a link to the survey. The users who receive the invitation can use the link until the expiration date set by the survey initiator.

Step by Step

1) To send a survey invitation, navigate to the **Surveys** tab.

The list of available surveys is displayed.

2) Locate the survey for which you want to sent an invitation.

3) Click and select **Invitation**.

A pop-up window is displayed with a pre-defined survey invitation.

From here, you can do one of the following:

- Set the survey expiration date.
- Click **Copy** to copy the survey invitation text to the clipboard and send it manually to specific users.
- Click **Send mail to participants** to open the default email client with a pre-populated message containing the survey invitation.

The users who receive the invitation need to open the link with a browser of their choice to start the survey.

It is not possible to use the link after the expiration date or if the survey has been stopped by the survey initiator.

3.12.5 Survey responses

While a survey is running, its status changes to **In progress**. In this status, responses from users are collected and you can view them in one of the following ways:

- In the **Surveys** tab, via the **Show Responses** option.
- During a conference call via the **Show results** option.

3.12.5.1 Showing survey results during a conference call

When a survey is distributed to conference participants, the initiator can view the survey results during the conference call.

The results are only available to the conference participant who has created and started the survey.

Step by Step

1) Click on the call control bar.
A new window is displayed informing that the survey is running.

2) Click **Show results**.

The survey responses window opens and you can view the survey title, expiration date, number of responses and a graphical representation of them, in a histogram or average graph.

When responses are displayed in a histogram, you can choose the graph representation (scatter, vertical or horizontal bars) and the order of the survey results (ascending or descending).

When responses are displayed in an average graph, you can choose the graph representation (bullet or gauge) of the survey results.

You can save the survey results in one of the following formats:

- As a PNG file, by clicking in the upper right part of the graph.

  This option only saves the graph representation. Any other data displayed in the survey results window is not displayed in the PNG file.
- As a PDF file, by clicking the in the upper right part of the survey results window.

  This option saves all the information displayed in the PNG file

Once the survey is stopped, it is no longer possible to view the survey results while in the conference call. You can only view the results in the **Surveys** tab.

3.12.5.2 Showing survey responses

You can view survey responses in the **Surveys** tab for:

- A survey that has been distributed to specific users via invitations.
- A surveys that has been started during a conference call, but it is not running anymore.

The results are only available to the UC user who has created and started the survey.

Step by Step

1) Click in the left navigation bar to open the **Surveys** tab.

The list of surveys is displayed in this area.

2) Locate the survey for which you want to view responses and click the button displayed on the right side.

3) Select **Show Responses** from the drop-down list.

The survey responses window opens and you can view the survey title, expiration date, number of responses and a graphical representation of them, in a histogram or average graph.

When responses are displayed in a histogram, you can choose the graph representation (scatter, vertical or horizontal bars) and the order of the survey results (ascending or descending).

When responses are displayed in an average graph, you can choose the graph representation (bullet or gauge) of the survey results.

You can save the survey results as a PNG file, by clicking in the upper right part of the graph. This option only saves the graph representation. Any other data displayed in the survey results window is not available in the PNG file.

3.12.5.3 Clearing survey responses

You can clear the responses collected for a survey via the **Surveys** tab.

The results are only available to the UC user who has created and started the survey.

Step by Step

1) Click in the left navigation bar to open the **Surveys** tab.

The list of surveys is displayed in this area.

2) Locate the survey for which you want to clear responses and click the button displayed on the right side.

3) Select **Clear Responses** from the drop-down list.

A pop-up window is displayed asking you to confirm the action.

4) Click **Yes**.

All responses collected previously for the selected survey are cleared and you can not view them anymore. To collect new responses, you must redistribute the survey.

3.12.5.4 Printing survey responses

You can print the responses collected for a survey via the **Surveys** tab.

Step by Step

1) Click in the left navigation bar to open the **Surveys** tab.

The list of surveys is displayed in this area.

2) Locate the survey for which you want to print responses and click the button displayed on the right side.
3) Select **Print Responses** from the drop-down list.

   The survey responses are displayed in a new browser tab.
4) Click in the upper right part of the screen to print the survey results.

3.12.6 Deleting a survey

You can delete a survey that is no longer needed via the **Surveys** tab.

Step by Step

1) Click in the left navigation bar to open the **Surveys** tab.

   The surveys created previously are displayed in this area.
2) Locate the survey you want to delete and click the **X** button displayed on the left side of the survey's title.

   A pop-up message is displayed asking you to confirm the delete action.
3) Click **Delete**.

The survey is removed from the list of surveys.

It is no longer possible to view the results collected previously for deleted surveys.

3.13 Hands Up

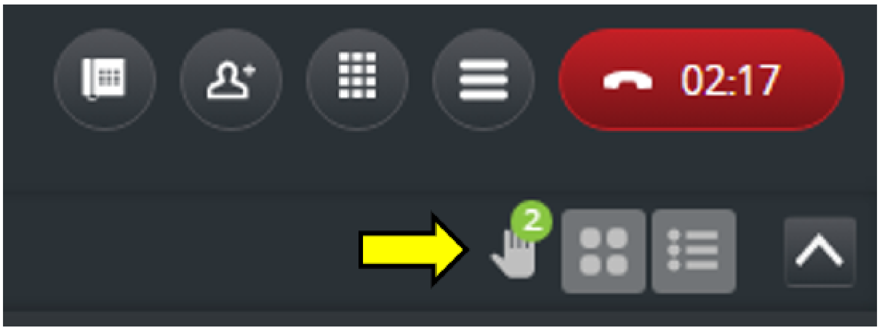
The Hands Up feature in conference calls allows active participants to raise or lower their hands and indicate to the moderator/s or other panelists whether they want to speak.

NOTICE: This feature is available to guest and non-guest participants.

3.13.1 Viewing the Hands Up

You can view the list of participants whose hands are up, in the order they have been raised, in one of the following ways:

- Click the hand icon at the right of the conference call control bar.



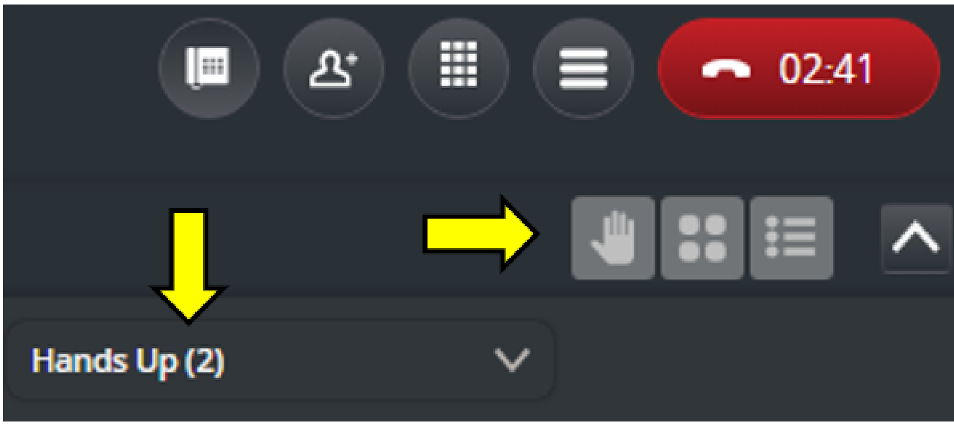
This icon appears only when at least one conference participant has raised their hand.

It also displays a green counter with the total number of hands raised. The counter increases or decreases when participants raise or lower their hands.

- Click on the list of participants at the right of the conference screen and select **Hands Up** from the drop-down list.

A list of guest and non-guest participants whose hands are raised and the total number of hands up are displayed.

NOTICE: When the Hands Up list is displayed, the green counter does not appear anymore. Instead, the total number of hands raised is displayed next to the list name.



3.13.2 Raising your hand during a conference

During a conference, you can click **Hands Up** on the conference call control bar to announce you want to speak.

When you raise your hand:

- The **Hands Up** icon turns green for you.

- The number of hands up increases.

  If at least one participant has their hand up, a hand icon appears at the right of the call control bar and displays a green counter with the total number of hands raised.

  For example, if two participants have raised their hands, the icon displays .
- All other conference participants receive a notification that your hand is up, at the bottom right of their screen. To view the notification, the UC client must be in focus mode.

  NOTICE: Participants do not receive a notification when raising their own hand.
- Your name is displayed in the **Hands Up** list.

  For more information about the **Hands Up** list, see Viewing the Hands Up on page 66.

Moderators verbally announce the participants who raised hands when they can talk.

When permissions to talk are given, participants can unmute themselves and contribute to the discussion.

3.13.3 Lowering your hand during a conference

During a conference, you can click **Lower Hand**  on the conference call control bar to lower it, if needed.

When you lower your hand:

- The **Lower Hand** icon turns gray for you.
- The number of hands up decreases.

  NOTICE: If no other participant has their hand raised, the hand icon with a green counter is no longer displayed at the right of the call control bar.
- Your name is no longer displayed in the **Hands Up** participants list.

  For more information about the **Hands Up** list, see Viewing the Hands Up on page 66.

Participants who lowered their hand previously can raise their hands when they want to speak again.

3.13.4 Lowering hands as a moderator

Moderators can lower hands for participants who have already spoken, so others can speak too.

NOTICE: It is not possible to lower all hands at once.

Follow the steps below to lower hands as a moderator:

Step by Step

1) Display the **Hands Up** list in one of the following ways:

- Click the hand icon with a green counter at the right of the conference screen.
- Click on the list of participants at the right of the conference screen and select **Hands Up** from the drop-down list.

The **Hands Up** participants list opens and you can view participants whose hands are raised, if any.

2) Hover over the participant's name whose hand you want to lower.

The **Lower Hand** icon appears next to the participant’s name.

3) Click .

When moderators lower a participant's hand:

- The **Lower Hand** icon turns gray for this participant.
- The name of the participant is no longer displayed in the **Hands Up** list.

  For more information about the **Hands Up** list, see Viewing the Hands Up on page 66.
- The number of hands up decreases.

> **NOTICE:** If no other participant has their hand raised, the hand icon with a green counter is no longer displayed at the right of the call control bar.

Participants whose hands have been lowered by a moderator can raise their hands when they want to speak again.

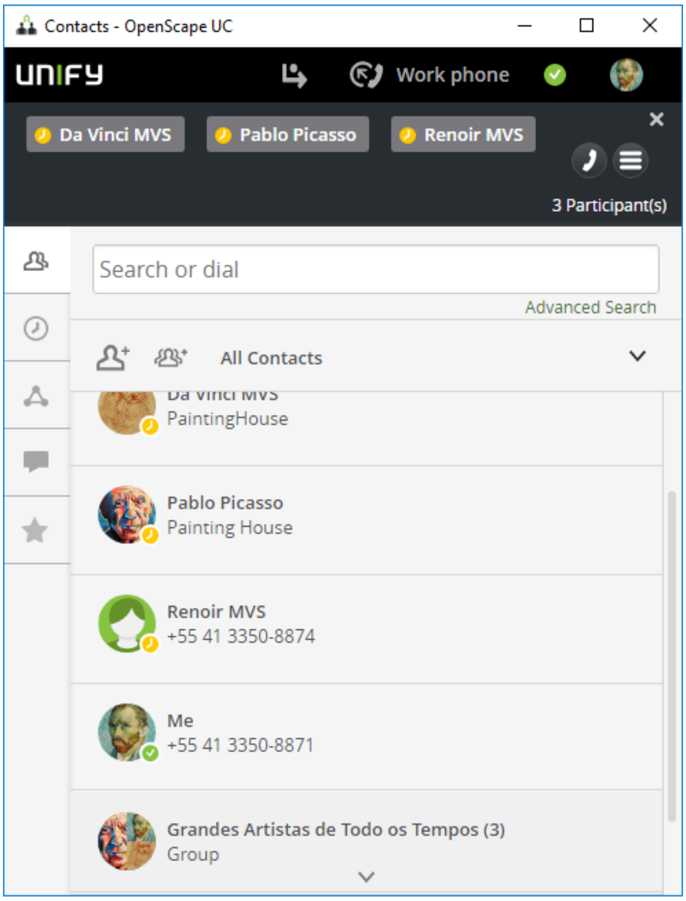
3.14 Action Bar

You can add contacts to the action bar by using the **add to action bar** icon .

The contacts can be added from:

- Call History
- Contacts
- Directory search

When you have added all the required contacts (e.g. you plan a multiple chat or a conference) your screen may look like this:



With the telephone symbol you can call them.

Click the phone icon to start a call or click on to access additional communication options, e,g, conference, chat.

In order to remove a single contact from the action bar, hover with the mouse over the contact and click on the "X" button next to the contact.

3.15 Profile overview

Profiles are used to handle rules so e.g. to define scenarios for meetings, business trips.

In the profile you can

- define a presence state which is set when the profile is active
- assign one or more rules which are applied when the profile is active.
- set a hierarchy of the rules, the sequence is important.

IMPORTANT:

Only one profile can be at a time active.

NOTICE:

The profiles **SmartClient rules** and **Standard Profile** are automatic profiles created for imported rules, when you migrate from previous versions. If you unassign the rules associated with these profiles, the profiles will be automatically hidden and not be available any more.

3.15.1 Creating a Rules Profile

Step by Step

1) On the task bar click on and select **Forwarding and rules settings**.
2) Click on **Profile** and select **Add a new profile**.
3) In the Profile configuration window, configure your **Profile name** and **Set presence status**.
4) In section **Rules of the profile** click on the arrow next to **Rules**.
   a) You can add further rules by clicking on the arrow again.
   b) If you have assigned more than one rule on the right side you see arrows so you can modify the sequence of the rules. The order is important.
5) Click on **Add profile**.

You have successfully created a new Rules Profile.

3.15.2 Editing a Rules Profile

Step by Step

1) On the task bar click on and select **Forwarding and rules settings**.
2) Click on **Profile** and click on the pencil .icon next to a profile
3) Edit the sections you want to change and click on **Save profile**.

   Refer to Creating a Rules Profile to see what can be entered in the sections.

3.15.3 Activating/Deactivating a Rules Profile

To activate a certain rules profile from your profiles list click on on the task bar, select **Forwarding and rules settings** and click on the profile you want to activate.

To deactivate a profile follow the same step as above and click on **Deactivate profile**

3.15.4 Deleting a Rules Profile

Step by Step

1) On the task bar click on and select **Forwarding and rules settings**.
2) Click on **Profile** and click on the **x**.icon next to a profile

3.15.5 Advanced Forwarding Rules

The OpenScape UC Application can automatically analyze incoming calls based on customized rules that route calls to a specific contact or terminal. For example, If you are out on business frequently and not able to accept your incoming calls personally, you can specify that calls arriving during a recurring meeting are automatically routed to a colleague, or your secretary, etc.

Incoming-call routing may occur according to the following criteria:

- Depending on whether the line is busy or the incoming call is unanswered.
- Depending on the caller's phone number.
- Depending on the date or time at which the call comes in.
- Depending on the setting of your presence status.

The OpenScape UC Application provides the ability to set simple or advanced forwarding rules, and supports **Backward Compatibility** with rules created in previous OpenScape UC releases.

3.15.5.1 Creating an Advanced Rule

You can create advanced rules, which are valid for a set time range, forwarding incoming calls and displaying specific presence status for selected contacts or contact lists. Advanced rules can be enabled and disabled.

Step by Step

1) On the task bar click on and select **Forwarding and rules settings**.
2) Click on the **Rules** tab and select **Add new Rule**.
3) Configure the **Name**, **Time and range**, **If my status is**, **If call is from** and **Forward to** sections.
4) Click **Save**.

You have created your rule. In order for the rule to be applied it needs tot be assigned to a Rules Profile. For more information on Rules Profiles, please refer to section Creating a Rules Profile.

3.15.5.2 Editing an Advanced Rule

You can edit the details of advanced rules.

Step by Step

1) On the task bar click on and select **Forwarding and rules settings**.
2) Click on **Rules** and click on the pencil .icon next to a profile
3) Edit the sections you want to change and click on **Save**.

3.15.5.3 Disabling an Advanced Rule

You can disable an advanced rule.

Step by Step

1) On the task bar click on and select **Forwarding and rules settings**.
2) Click on the **Profile** tab
3) You can remove the rule from the profile which is active by editing the profile. Another option is to deactivate the profile.

   For more information regarding profiles, please refer to Editing a Rules Profile and Activating/Deactivating a Rules Profile.

3.15.5.4 Deleting an Advanced Rule

You can delete an advanced rule.

Step by Step

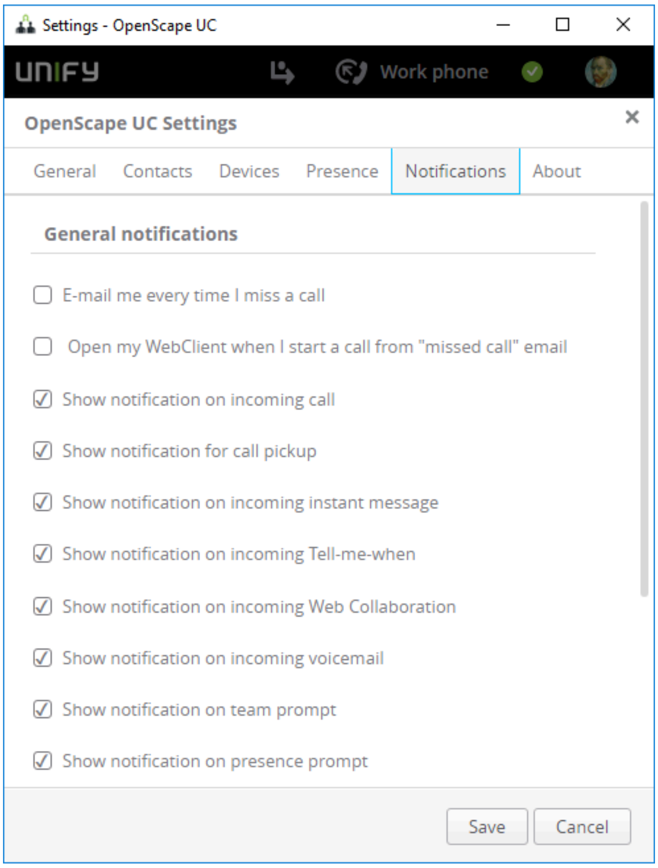
1) On the task bar click on and select **Forwarding and rules settings**.
2) Click on the **Rules** tab and click on the **x**.icon next to a rule.
3) Click **Save**.

3.16 Enable/disable desktop notifications

It is possible to enable / disable desktop notifications

Under **Fusion** > **Settings** > **OpenScape UC Settings** click the **Notifications** tab.

Here you can select which desktop notification will be displayed or suppressed.



3.17 MS Office 365 Integration

OpenScape UC users can activate the integration with MS Office 365 to have access to the following features:

- Contacts search can look also for your Outlook 365 personal contacts. See chapter Searching for Contacts on page 29 for more details.
- Display the “Out of Office” notification for contacts with accounts in Outlook 365:

  – In **Call Control**, the  icon appears next to the called contact name. You can click this icon to read the notification.

    The same icon is displayed in **Call History**, when you select the call details.

    In **Contact Details**, the **Out of Office** link is displayed below the contact name. You can click the link to read the notification.

To activate it in your Client, go to the **OpenScape UC Settings**, **Contacts** tab and click the option to access contacts and information from your Office 365 account. You will be prompted to sign in with your Office 365 account. Allow the required permissions to use the above features.

NOTICE: An integration with Office 365 is also required in OpenScape UC Server side for this feature. Contact your system Administrator to check if this is available in your system.

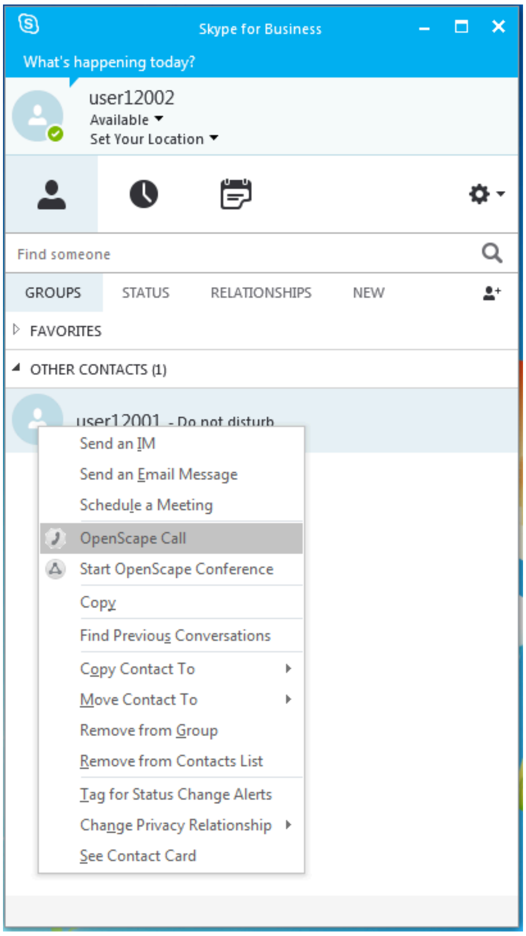
NOTICE: OpenScape UC users must perform only one authentication per client session.

3.18 Skype for Business

The OpenScape Fusion for Office plug-in for Skype for Business enables the UC features for call and conference.

In order to access the UC features you can do the following:

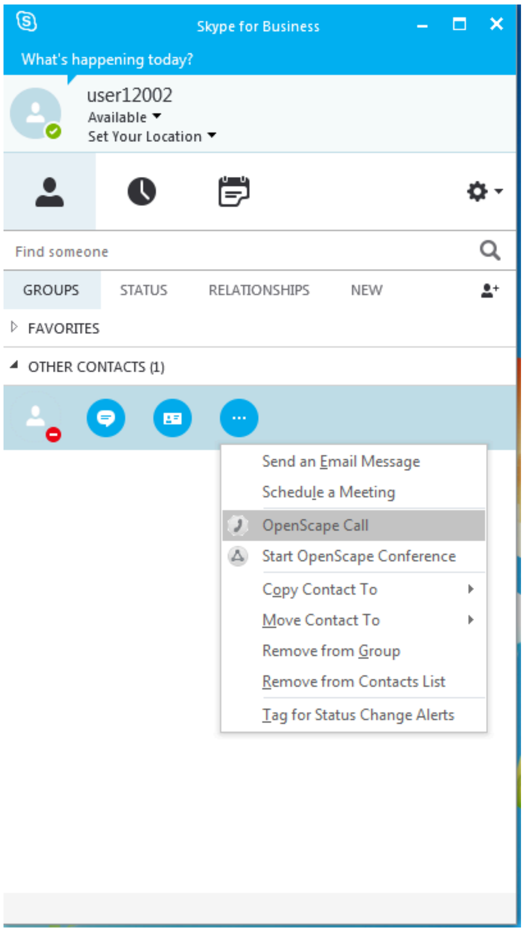
- Click with the right mouse button on the contact(s) you wish to call or initiate a conference.



- Or click on the contact you wish to call or initiate a conference. Click on the elipsis button and choose the desired function.

NOTICE:

You can add more participants in a conference once you initiate it.



3.19 Fusion for Office on VDI Systems (Citrix, VMWare Horizon)

Virtual Desktop Infrastructure (VDI) under Citrix or VMWare Horizon provides the functionality to work transparently and remotely on the server and so most of process and memory consumption needs not to go through the remote desktop. There are several other benefits so that software needs to be installed and maintained on a single place.

NOTICE:

For more information refer to OpenScape UC Application V10, OpenScape Fusion in VDI Systems, Installation Guide.

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