A MITEL
PRODUCT
GUIDE

Mitel OpenScape UC Application V11

UC Desktop Application

User guide

03/2025

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Contents

1 About this Document

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

1.1 History of Changes

Date	Changes	Reason
05-12-2022	Create V11 document	

1.2 About this Document

This document addresses end users who deploy OpenScape Desktop Application of the OpenScape UC as part of the UC solution.

1.3 Markups used

In this document we use the following markups to highlight specific passages.

Element	Markup
GUI elements	Select **Save** to …
Sequence of menu items	**Users& Resources** > **Resources**
Command line output	`C:> unknown command`
System input	Enter `true` in the ... field.
Directory and file names	`/var/config.xml`
File contents	`conname=%CONNECTION_NAME%`
Names of keyboard keys	Push `Esc` to …
Specifications with varying content	<user name>

1.4 Acronyms used

In this document we use the following acronyms.

Acronym	Meaning
CTI	Computer Telephony Integration
DTMF	Dual Tone Multiple Frequency
GUI	Graphical User Interface
HTML	Hypertext Markup Language
IP	Internet Protocol
ISDN	Integrated Services Digital Network

Acronym	Meaning
LAN	Local Area Network
MWI	Message Waiting Indicator
OND	One-Number Device
ONS	One-Number Service
PKI	Public Key Infrastructure
PSTN	Public Switched Telephony Network
QoS	Quality of Service
RAM	Random Access Memory
SIP	Session Initiation Protocol
TCP	Transmission Control Protocol
TC	Telecommunications
TUI	Telephony User Interface
UDP	User Datagram Protocol
UMS	Unified Messaging System
URI	Uniform Resource Identifier
XML	Extensible Markup Language

1.5 Overview of the Client

The OpenScape UC Desktop App is an OpenScape UC client that can be installed in the user's desktop. It's designed to tightly integrate with the OpenScape UC WebClient, adding extra features with the purpose to allow a better user experience and interaction with the suit of OpenScape products.

The OpenScape UC Desktop App provides all the existing UC WebClient features, as well as the following additional features:

- Easy installation/updating
- Can be launched automatically when your system starts
- WebRTC softphone capabilities
- Compatible with Jabra, Epos/Sennheiser, Poly/Plantronics, Gigaset ION, Logitech and Yealink headsets (call control buttons through HID interface)
- Hotkeys to answer a call or to make a call to a selected number
- Supporting Tel: protocol
- Toaster notification feature for the most important events (call, chat, TMW)
- Improved usability ("Where is the OpenScape UC TAB in my browser?")
- Collaboration with Microsoft Teams as a service running in the background
- System tray functionality that allows access to important features

2 Getting Started

This chapter describes the first steps to download and start using the UC Desktop Application.

2.1 Installing the UC Desktop App

The installation of UC Desktop App is initiated via the UC WebClient. Follow the instructions below in order to install the Desktop App.

NOTICE:

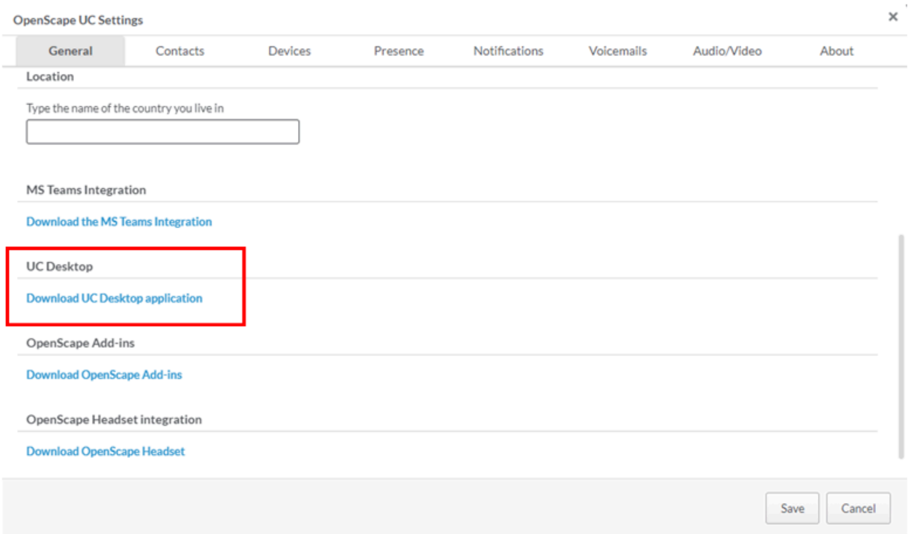
UC Desktop App does not update over the Desktop Integration Tool (DI-Tool). UC Desktop App is installed and run independently. If you want to remove the DI-Tool, you have to uninstall it separately.

2.1.1 Downloading and Extracting the Desktop App .zip file

In the settings menu of OpenScape UC Web Client, you can find the link to download the installation files. If you don't see the link, contact your system administrator in order to activate it.

Step by Step

1) Navigate to **Settings** > **General** tab in the WebClient and click on the **Download UC Desktop Application** link.



A `.zip` file named `ucdeskapp.zip` will start downloading.

2) Locate the `ucdeskapp.zip` (usually in the Download folder by default) and extract it.

The following two files are extracted:

- `UCDesktopAppSetup.exe`
- `deployment.json`

3) Double click on the `UCDesktoAppSetup.exe` file to open the Installation wizard and initiate the installation process.

Follow the instruction of the installation wizard to finish installing the Desktop App.

2.1.2 Adding Trusted Exceptions

For optimum use of OpenScape UC Desktop App, it is recommended to add the following process as trusted exception in your antivirus software:

`C:/Users/<USER>/AppData/ Local/Programs/UCDesktopApp/UCDesktopApp.exe`

NOTICE:

If you chose the installation to be done for all users in your computer, the default path of the installation is:

`C:/Program Files/UCDesktopApp/UCDesktopApp.exe`

2.1.3 Mass Rollout

The Mass rollout support of UC Desktop App is done through the **UCDesktopAppSetup.exe** setup file.

In such situation (install via **command line**), the necessary configuration of the UC Desktop App is specified using command line **parameters** that **MUST** be explicitly provided by the **deployment tool** used by the customer.

i.e: **UCDesktopAppSetup.exe/S/STARTUPURL**="https://uc.oseft.global-intra.net:8443/openscapeuc/" **/NoIcons**

Supported parameters:

The following parameters are accepted by the UC Desktop App setup:

Parameter name	Description	Example of use
S	Instruct the setup to run silently (with no user interface and no user interaction).	UCDesktopAppSetup.exe **/S** /StartupURL="https://uc.oseft.global-intra.net:8443/openscapeuc/"
StartupURL	Specify the WebClient URL.	UCDesktopAppSetup.exe /S **/StartupURL="https://uc.oseft.global-intra.net:8443/openscapeuc/"**
Allusers	Install for all users of the computer. **See note 1.**	UCDesktopAppSetup.exe /S **/AllUsers** /StartupURL="https://uc.oseft.global-intra.net:8443/openscapeuc/"

CurrentUser	Install for current user only. **See note 1.**	UCDesktopAppSetup.exe /S **/CurrentUser** /StartupURL="https://uc.oseft.global-intra.net:8443/openscapeuc/"
Language	Specify the language that will be used by the application. If **not** informed, the **system language** is used. Options: "fr" "pt" "de "ru" "en" "it" "es" "pl" "cs" "zh"	UCDesktopAppSetup.exe /S **/Language="fr"** /StartupURL="https://uc.oseft.global-intra.net:8443/openscapeuc/"
RunAfterInstall	Run the UCDesktopApp as soon as the installation finishes.	UCDesktopAppSetup.exe /S **/RunAfterInstall** /StartupURL="https://uc.oseft.global-intra.net:8443/openscapeuc/"
NoIcons	Remove Desktop icon after the silent installation finishes.	UCDesktopAppSetup.exe /S **/NoIcons** /StartupURL="https://uc.oseft.global-intra.net:8443/openscapeuc/"
HotkeyMakeCall	Specify hotkey to make a call	UCDesktopAppSetup.exe /S **/ HotkeyMakeCall="CTRL + SHIFT + 1"** /StartupURL="https://uc.oseft.global-intra.net:8443/openscapeuc/"
HotkeyAnswerCall	Specify hotlkey to answer/ accept incoming call	UCDesktopAppSetup.exe /S **/ HotkeyMakeCall="CTRL + SHIFT + 2"** /StartupURL="https://uc.oseft.global-intra.net:8443/openscapeuc/"
HotkeyLeaveCall	Specify hotkey to leave the current call	UCDesktopAppSetup.exe /S **/ HotkeyMakeCall="CTRL + SHIFT + 3"** /StartupURL="https://uc.oseft.global-intra.net:8443/openscapeuc/"

HotkeyDeclineCall	Specify hotkey to decline or cancel a call	UCDesktopAppSetup.exe /S /**HotkeyMakeCall="CTRL + SHIFT + 4"** /StartupURL="https://uc.oseft.global-intra.net:8443/openscapeuc/"
D	Specify the system path where the UCDesktopApp installation filles will be installed. Must be the last parameter used in the command line. Must not contain any quotes (even if the path contains spaces). Only absolute paths are supported.	UCDesktopAppSetup.exe /S /StartupURL="https://uc.oseft.global-intra.net:8443/openscapeuc/" **/D="C:\UCDesktop"**
U	Uninstall the UCDesktopApp. Must be the only parameter in the command line (otherwise the setup will not proceed).	UCDesktopAppSetup.exe **/U**
NoHeadsetIntegration	Specify if the headset integration will be disabled	UCDesktopAppSetup.exe /S /**NoHeadsetIntegration** /StartupURL="https://uc.oseft.global-intra.net:8443/openscapeuc/"
DisableAutoUpdate	Do **notshow** the download link on WebClient settings interface & the UCDesktopApp will also **notcheck** for **new** updates.	UCDesktopAppSetup.exe /S /**DisableAutoUpdate** /StartupURL="https://uc.oseft.global-intra.net:8443/openscapeuc/"
DoNotBlinkOnMissedCall	When a **missed** call is **detected**, the **systemTray** and **TaskBar** icon of UCDestkopApp will **notblink**.	UCDesktopAppSetup.exe /S /**DoNotBlinkOnMissedCall** /StartupURL="https://uc.oseft.global-intra.net:8443/openscapeuc/"
NoUICheck	During UCDesktopApp loading, the **ConferenceTab** UI check is **skipped** (and only other UI elements are verified/check if the UCDesktopApp could load successfully).	UCDesktopAppSetup.exe /S **/NoUICheck** /StartupURL="https://uc.oseft.global-intra.net:8443/openscapeuc/"

NoHeadsetService	The headset service is **enabled** by **default**. Only use this command line if you wish to **disable** the headset service.	UCDesktopAppSetup.exe /S **/ NoHeadsetService** /StartupURL="https://uc.oseft.global-intra.net:8443/openscapeuc/"
ForceSilent	This parameter will **only** take effect when **upgrading** using silent setup of an **All Users installation.** PS: IF upgrading/ installing in a **currentUser** installation the parameter will have **no effect**.	UCDesktopAppSetup.exe /S **/ForceSilent** /StartupURL="https://uc.oseft.global-intra.net:8443/openscapeuc/"
CleanInstall	Allow **silentinstallation** to **override** any user settings previously configured: Hotkeys, language, launchMinimized **Note1:** In a **first** App installation there is no effect. Only works in an **upgrade** scenario. **Note2:upgrading** (of an **All Users** installation) the **ForceSilent** parameter **MUST** be used otherwise setup will proceed in default way (with user interaction).	UCDesktopAppSetup.exe /S **/CleanInstall** /StartupURL="https://uc.oseft.global-intra.net:8443/openscapeuc/"
LaunchMinimized	These settings will **only** take effect in case of the **first** App **installation**. In case of **upgrade** scenario: the parameter **/ CleanInstall** can be used.	UCDesktopAppSetup.exe /S **/Launch Minimized** /StartupURL="https://uc.oseft.global-intra.net:8443/openscapeuc/"
AudioCheck	These settings must be enabled **only** for environments were **ghost ring** is observed.	UCDesktopAppSetup.exe /S **/Audio Check** /StartupURL="https://uc.oseft.global-intra.net:8443/openscapeuc/"

SkipServerCheck	Default value: **False** This parameter must be used only for customers that have specific problems related to the UCDesktopApp backend server version check during the App startup. These settings must be enabled (or added to deployment.json) **only** when **necessary** or by **GVS recommendation.**	UCDesktopAppSetup.exe /S **/SkipServerCheck** /StartupURL="https://uc.oseft.global-intra.net:8443/openscapeuc/"
NoRefreshOnPowerResume	This parameter must be used to not force the fetching of voicemails after the PC wakes up from sleep.	UCDesktopAppSetup.exe /S **/NoRefreshOnPowerResume** /StartupURL="https://uc.oseft.global-intra.net:8443/openscapeuc/"
NoSilentModeStart	This parameter must be used to not start the App in silent mode (show the splash screen during the start).	UCDesktopAppSetup.exe /S **/NoSilentModeStart** /StartupURL="https://uc.oseft.global-intra.net:8443/openscapeuc/"

NOTICE:

- If **/AllUser** and **/CurrentUser** is not specified, the **default** mode used is **/CurrentUser** for the **first** installation (clean installation).
- If it is an **update** from a previous installation (and no parameter is specified), by **default** the previous installation mode is used:

i.e:

===> **update** from **AllUsers** installation (without specifying /allusers or /currentuser), the installation will be **AllUsers**.

===> **update** from **CurrentUser** install (without specifying /allusers or /currentuser), the installation will be **CurrentUser**.

===> The **setup** checks all the **parameters** specified in the command line. If some wrong/unrecognized **parameter** is specified and/or **/CurrentUser** or **/allUsers** option is not explicitly specified, the setup will **abort** and add such information in the setup log.

If you chose the installation to be done for all users in your computer, the default path of the installation is:

`C:/Program Files/UCDesktopApp/UCDesktopApp.exe`

2.2 Updating the UC Desktop App

Go to the System tray menu and click **Check for Updates** to check if there is a new version of the UC Desktop App available for updating. If a new version is available, you can choose to start the upload immediately or not.

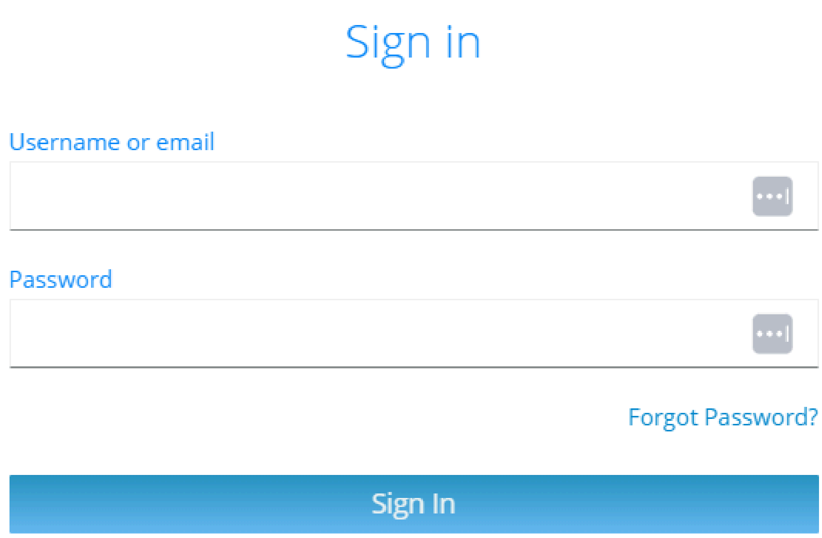
2.2.1 Automatic Update

If the **Automatic Update** feature is enabled in the system, you will be automatically informed when an update is available. The **Update Now!** option will be displayed in the System tray menu and in the Help option of the Main menu. The following toaster will be displayed:

If you close your UC Desktop App, the update will be done automatically by the time you start it again.

2.3 Signing In

To sign in the OpenScape UC Desktop App, you need to enter your UC credentials. If the system is not configured for an automatic login, please ask your system administrator to get your credentials (User Name and Password) to use this product.



Once you have signed in the OpenScape Desktop App, the user interface is displayed.

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.

2.4 Signing Out

You may want to log off before closing your browser to show the other users that you are no longer connected to the system:

To log off click on your login name in the header bar and select **Sign out**.

2.5 Changing your password

It is highly recommended to change your password regularly to prevent unauthorized access to your account.

Step by Step

1) Click on your login name at the top right of the header bar and select **Profile** from the drop-down menu.
2) Select the **Change password** tab.
3) Enter your current password in the **Old password** field.
4) Enter the new password in the **New password** field.
5) Enter the new password again in the **Re-type new password** field.
6) Click **Save**.

2.6 Determining your Preferred Device

You can choose a device for initiating outgoing calls or receiving incoming calls.

Step by Step

1) Click in the header bar.

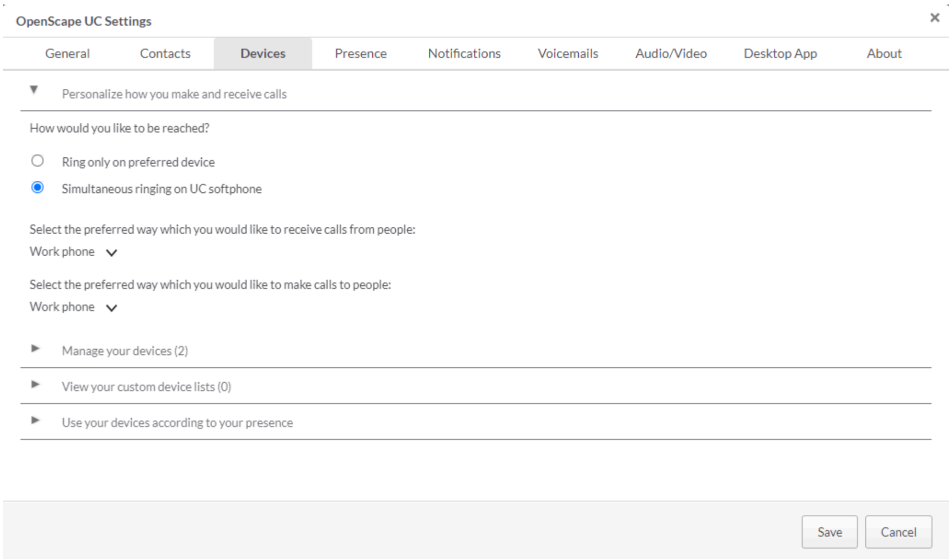
   The settings menu opens.
2) Select a device for **Incoming calls** and a device for **Outgoing calls**.

You have now determined your preferred device for incoming and outgoing calls.

You can also set your preferred device via **Settings**.

2.7 Options to make and receive calls

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



2.7.1 Outgoing calls

You can make outgoing calls in one of the following ways:

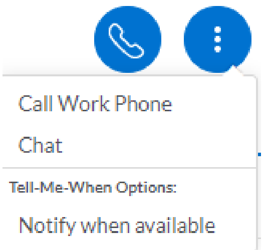
- Use the outgoing preferred device;
- Bypass the preferred device setting and use the UC softphone device;
- Choose the device from a menu prompted for every outgoing call.

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.

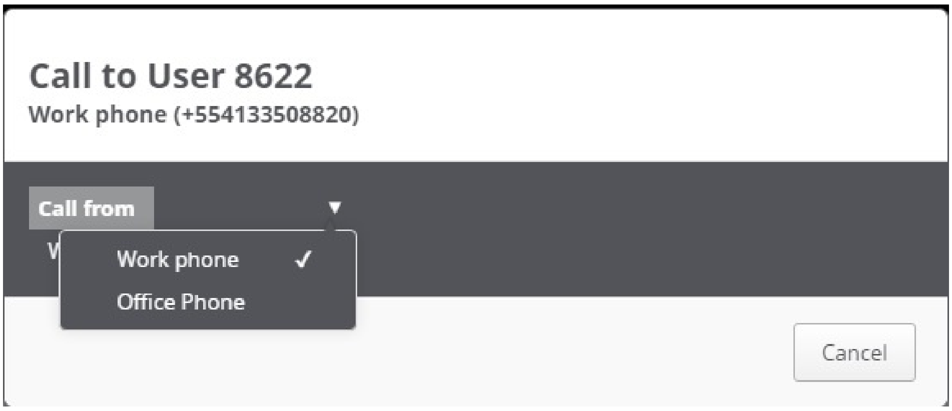
Each time the user chooses a different device in the prompt, the outgoing preferred device changes.

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:



2.7.2 Incoming calls

You can receive incoming calls in two different ways:

- Alert only the incoming preferred device;
- Get a simultaneous signal on the softphone.

Using simultaneous ring, when a call comes in to the user, the UC softphone 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.

2.8 Adding a new device

You can select a device from your list and make it your preferred device. New devices can be added to this list at anytime.

Step by Step

1) Click on your login name at the top right of the header bar and select **Settings** from the drop-down menu.

2) Select the **Devices** tab.

3) Select **Manage your devices** and click **Add a new device**.

4) Enter the details of the new device:

   a) Enter a name for the new device in the **Device name** field.

   b) Enter the phone number associated with the new device in the **Phone number** field.

   c) Set your **Ring and redirection preferences** preferences.

5) Click **Add device**.

6) Click **Save**.

A new device is added to the device list.

2.9 Setting your Presence Status

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

Step by Step

1) Click your current presence status in the header bar (e.g. ✅) to open the presence setting menu.
2) Select one of the presence statuses from the list of options. (Available, Do not disturb. Busy, etc).

   The following presence statuses are available:

   - Available
   - Away
   - Do not disturb
   - Be right back
   - Busy
   - In a meeting

Your new presence status is displayed in the header bar.

> **NOTICE:** The installation of OpenScape Conference Extensions is required to synchronize the presence status with MS Outlook or HCL Notes Calendar and automatically change the status to “In Meeting” when an appointment starts.

To define the presence status accordingly when you log in or log off, go to **Settings** > **Presence** > **My presence status during login / logout**.

2.10 Desktop App Features

Using the Desktop UC client you can deploy all the OpenScape WebClient features. These are the following:

Call features

- Managing calls

Conference features

- Creating and initiating persistent audio and web conferences
- Initiating scheduled audio, video, and web conferences
- Using the UC Guest Access feature to join conferences

Contact features

- Creating and organizing private contacts or teams

Chat

- Chats with a single or more than one communication partners

Profiles

- Creating and editing profiles for handling rules and communication scenarios

Voicemail features

- Displaying and playing voicemails

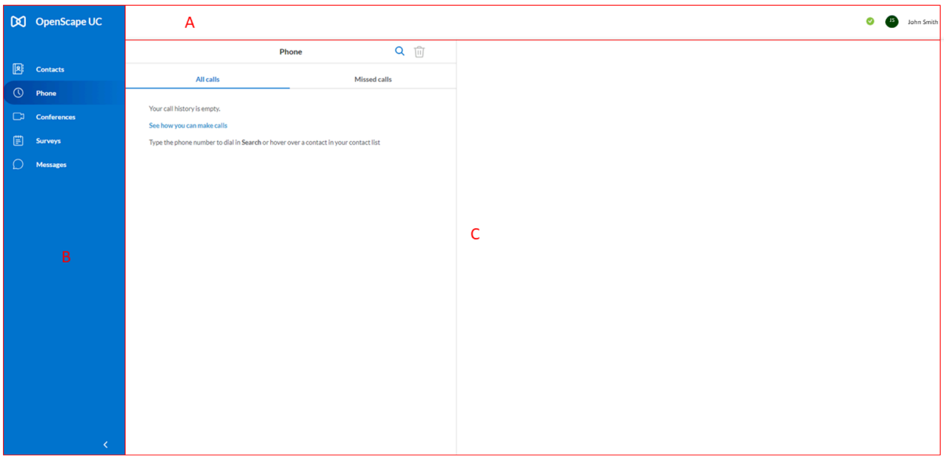
Accessibility features

- Enabling visual keyboard indicator
- Using screen reader feature
- Adjusting interface contrast

3 Structure of the User Interface

The different sections of the user interface are displayed in the figure below:

Without optional areas:



Section	Description
A	**Header bar** - Displays your profile picture, presence status and features that are enabled for you (e.g. voicemail). When you click on your profile picture, a menu will open with additional options that allow you to access information and settings for your account and client.
B	**Navigation bar** - Displays the basic navigation menu for Unify Phone. The following options are available on the left menu: • **Contacts** • **Phone** • **Conferences** • **Surveys** • **Messages** The navigation can be displayed in two modes: expanded or collapsed. In expanded mode, the left menu shows the names of the menu items and the icons representing them. In collapsed mode, it shows only the icons representing the menu items.

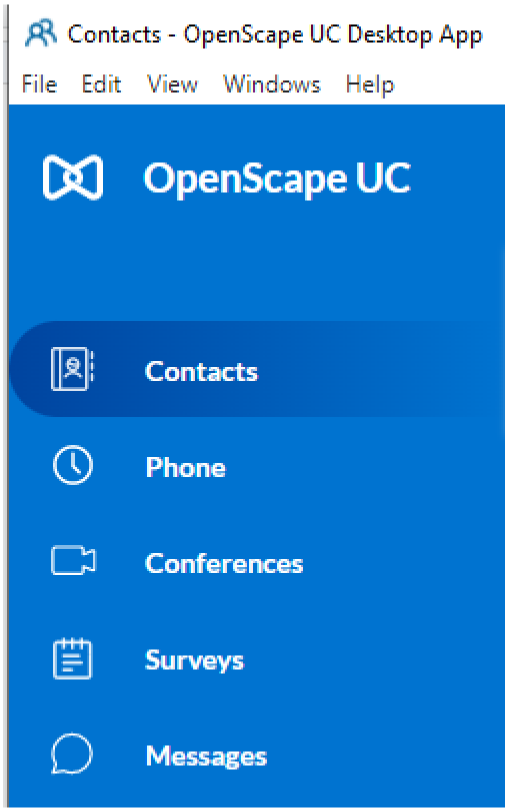
Section	Description
C	**Display menu** - Displays information related to the option selected in the navigation bar. In full screen mode, the Display menu presents two sides: - Left side: the full list of the option selected from the navigation bar, such as Contacts or Messages. - Right side: the detail for the item selected on the left side, such as a contact's information or a chat conversation. In mini view mode, the Display menu presents only the right side.

The OpenScape Web Client is designed in a responsive web design. As a result, the OpenScape Web Client is adaptive to the browser size, displaying all of its components in a mini view when the browser is restored down to a smaller size. When the OpenScape Web Client is displayed in the mini view, the Contact Area is shown in the Navigation Bar, while the contact details are displayed in the content area.

The left menu can be displayed in two modes: expanded or collapsed. In expanded mode, the left menu shows the names of the menu items and the icons representing them. In collapsed mode, it shows only the icons representing the menu items.

3.1 Application menu

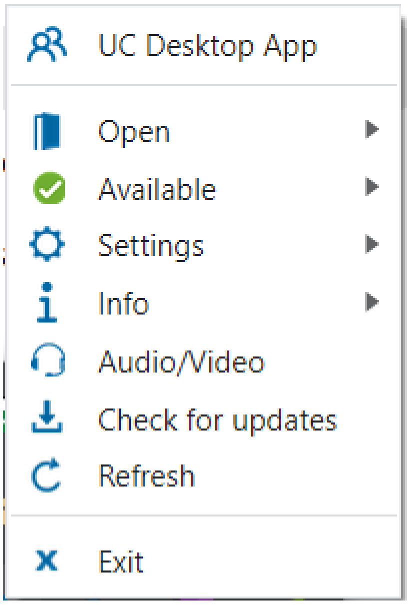
You can you the application menu to access the main feature of OpenScape UC.



3.2 System tray menu

You can use the system tray menu to quickly change or handle some basic features from your desktop interface without the need to open the main application.

To open the system tray menu, right-click on the application icon on your Widows toolbar to open the System Tray menu, as shown in the screenshot below:



From the system tray menu, you access quickly the following settings:

- **UC Desktop App** button

  Clicking the UC Desktop App button open the main interface of the UC Desktop application.
- **Open**
  - **UC Profile**

    Access directly your UC User Profile
  - **UC Settings**

    Access directly the UC **Settings** tab
  - **UC Forwarding and Rules**

    Access directly your forwarding and rules interface where you can set your call forwarding preferences, rules and profiles, as described in sections:

    Simple and Advanced Forwarding Rules and Profiles and Rules.
- **Presence status button**

  See or change your current presence status (Available, Busy, Do Not Disturb, etc)
- **Settings**

  Quickly access your main application settings and configurations:
  - **Headset integration**

    Enable/disable the Headset integration feature of the UC Desktop App as described in the Headset Integration section.
  - **Open Log folder**

    Access your log files, used for maintenance purposes.
  - **Open Setting file**

    Access deployment options and application settings.
  - **Open Installation folder**

    Access the folder where your application was installed.
  - **Reload button**

    This option restarts the UC application.
- **Refresh** button

  Refresh your application just like pressing the F5 button and load again the content of the main application window.
- **About** button

  Display your End user License Terms
- **Exit** button

  Close and sign out from the UC Desktop application.

3.3 Exclusive tab for Desktop App settings

The OpenScape UC Desktop App has an additional tab in the Settings menu that allow you to customize your user settings.

You can open the exclusive tab by clicking on your login name and selecting **Settings** > **Desktop App**.

In this exclusive tab you can configure the following:

- **Customizable hotkeys**
  - To make a call
  - To accept incoming calls
  - To leave an ongoing call
  - To decline a call
- **Control app notifications**

  Notification toasters are displayed to notify you for events like new chat messages, incoming calls, e.t.c. You can enable or disable Desktop App notification feature.

  UC Desktop App displays notifications for the following events:

  - Incoming calls

    - Conferences*

    - Direct calls*

    - UC Team call
  - Chat messages
  - Outgoing calls

    - New call initiated by MS Teams Integration plug-in**

    - New call initiated by using Tel protocol

    - New call initiated by hotkey action (specify hotkey to make a call)
  - New Voice Mail

  * You can accept or reject incoming call using the toaster

  **You can end the call using the toaster
- Windows behavior during startup (app launch minimized)
- Enable headset integration to answer/clear call via headset buttons (controllers)

3.4 Headset Integration

The UC Desktop Application supports the Headset Integration feature.

This means that the UC Desktop app allows the use of headset buttons of supported manufacturers for call control actions such as to answer, clear or mute a call. You can enable or disable this feature from the he Desktop App settings menu, option Enable headset integration or from the **Settings** option in **System Tray** menu.

In the settings of System Tray menu, you can also see the list of supported headsets connected to your computer. If a connected headset is not supported, then it will not appear in the list. The active headset being used by the application is marked with a check mark.

You can change the active headset just by clicking on the desired model in the list.

3.4.1 Poly/Plantronics Device Requirements

The UC Desktop app allows integration with Plantronics devices. To enable this functionality, you must install the Plantronics Hub software on your computer.

If there are more than one Plantronics headset plugged in, the primary headset specified in Plantronics Hub must be selected in the Audio/Video tab of OpenScape UC Settings Tab dialog. To do so, navigate to the system tray menu and select **Open** > **Settings**.

4 Calls

With Open Scape UC application you can easily make and receive phone calls, view your current calls and manage them as you need.

General call features:

- Make a call
- Answer, decline or drop a call
- Forward calls
- Make consultation calls
- Hold and retrieve a call
- Toggle calls
- Transfer calls

4.1 Receiving a call

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

Procedure

- To answer the call, click .
- To decline the call, click .
- To transfer the call, click and search for a contact or a phone number.

4.2 Calling a contact

You can start a call with one of your contacts

Step by Step

1) Click **Contacts** in the contact area.
2) Select a contact form the contact directories or search for a contact.
3) Click on in the signaling bar:
4) Click on and select the directory number for the call.

A call control bar opens, displaying the new connection.

4.3 Calling a directory contact

You can call a contact who is not one of your private contacts but whose data is available in the directory.

Step by Step

1) Click
2) Click .

3) Enter the name or phone number in the search field of the contact area and press **Enter**.
4) Click in the signaling bar.

A call control bar opens, displaying the new connection.

4.4 Rejecting a call

To reject an incoming, call click on the signaling bar.

4.5 Terminating an active call

While conducting a phone call, click on the call control bar. If you use the terminal device's receiver for the call, simply put it down.

4.6 Placing a call on hold

While on an active call, you can place the call on hold so that you can perform another task such as making or answering another call.

Procedure

- To place a call on hold, click **Hold current call** on the call controls.

  The other party will be placed on hold until you retrieve or transfer the call.
- To return to the call, click **Retrieve call** again on the call controls.

4.7 Transferring a call to another subscriber

While you are on a call, click on the call control bar.

A field to select to whom you want to transfer the call is displayed.

You can search for a contact or enter the contact's phone number in the input field. To transfer the call, click next to the contact you want to transfer the call to.

4.8 Pushing an ongoing call to desk phone

You can push an active call from the OpenScape UC app to your desk phone.

Prerequisites

- A desk phone has been assigned to you on your OpenScape system.
- You are on an ongoing call on the OpenScape UC app.

To push the call:

Step by Step

1) Click on the call controls.

   A menu with a list of devices is displayed.

2) Select the device for pushing the call.

   The active call is being handed over.

   The device rings.

3) Accept the call on the device.

4.9 Alternating between calls

You can make and receive multiple phone calls on OpenScape UC, but only one call can be active at a time. Others can be either incoming calls or calls on hold.

The signaling bars of the various phone connections are represented as tabs in the tab bar. The tabs of held calls are grayed out. Using the controls in the tabs you can decide which of the phone connections to deploy for conducting a call. This process is called alternating between calls.

While connected simultaneously to two or more phone connections:

- Click on **Hold current call** in the associated tab to place a currently active call on-hold.

  The call is placed on-hold.

- Click on **Retrieve call** in the associated tab of the tab bar to reconnect to a held call.

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

Example

NOTICE:

It is not possible to alternate/reconnect between incoming calls established on a preferred device while using external OND, such as a mobile phone.

Alternating between such calls is only possible thorough the external OND.

4.10 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 by clicking on the call control bar or directly from the **Contacts** list.

4.11 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.

This feature is available when using WebRTC as your primary work phone (ONS) or as a preferred device (OND). The WebRTC number must be a member of the MLHG.

4.12 Multi Line Hunt Group

This feature is available when using WebRTC as your primary work phone (ONS) or as a preferred device (OND). The WebRTC number must be a member of the Multi Line Hunt Group (MLHG).

Restriction: If the UC user has set an OND (e.g. not ONS) as preferred device, calls distributed by Multi Line Hunt Groups (MLHG) cannot be handed over to other devices while they are ringing. The reason is that OpenScape Voice does not allow a second deflect for MLHG calls.

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

Client 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	

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

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

Client connected to OpenScape 4000, supports:

- Login / Logoff

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

You can login / logout of the hunt group clicking on the client 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

4.13 Making a video call

During a call, you can stream video using your configured camera, if your system supports video calls.

To start streaming video in a conversation or in an active call, click on **Start video streaming** button.

4.14 Call history

You can see the history of your calls by selecting **Phone** from the left menu of the app.

The **Phone** area includes the following sections:

- The **All calls** tab displays the list of all your incoming and outgoing calls.
- The **Missed calls** tab displays only the list of all incoming calls that were not answered.
- The **Voicemails** tab displays all your voicemail messages.

Further information about calls is listed in the call history:

- Connection type (incoming, outgoing, accepted, missed)
- The duration of the call
- Date and time
- Phone number of the caller / callee
- The name or presence status of the caller / callee
- Further phone numbers in case of a forwarded call

4.15 Initiating screen sharing

During an active call or during a conference call, you have the option to share your screen. In conference calls, you can also share the system's audio for an improved sharing experience.

Prerequisites

Your administrator has enabled the screen sharing functionality on your system.

Step by Step

1) To start a screen Sharing session, click **Start Screen share** button.
   You will be prompted to select which screen to share in order to start the session. Once selected, the other party will see your screen.
2) If you want to share your system's audio along with your screen in a conference call, enable the **Share audio** option when prompted to select which screen to share. This option is only displayed when you select to share the **Entire Screen** or the browser's tab.

You can use the Take picture option to capture a picture of what is being shared and see a list of additional options. For more information, see Integrating screen share with other features on page 69.

The other call party will see your screen in the designated Call Control section. You can also access the Mouse Pointer, Comment Pointer and Remote Desktop Control functionalities, as described in the Conferences section.

4.15.1 WebRTC Screen Sharing in a call to an external contact

You can share screen information with an external contact by providing a unique URL and a PIN password.

Prerequisites

You are sharing your screen

Step by Step

1) While sharing your screen click ⁝ below **Screen Share Options** and select **Notification e-mail**.
A Screen share invitation email with a unique URL is generated.

2) Click on the **Show PIN** option under the **Screen Share Options**.
The PIN is displayed.

3) Send the URL link to the external participant along with the 6-digit PIN.

Upon receiving and opening the link, the external participant will be requested to enter the unique PIN.

NOTICE:

The screen share access to external participant will be canceled if the active call is set to on hold. 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.

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5 Contacts

Contacts enable you to access the public directory and collaborate with other users on your system. The public directory also includes contacts from other active directories, allowing you to connect with them via phone calls, emails, or chat. Additionally, you can create your own list of contacts by adding new contacts or modifying the information in the public directory.

5.1 Creating a new contact

You can create new contacts and use them to make phone calls, send chat messages, or start a conference.

Step by Step

1) Click **Contacts** on the navigation bar.
2) Click and at the top right of the Contacts panel and select **Add Contact** from the drop-down menu.
3) Enter the contact information in the respective fields.
4) Click **Save**.

A new contact is created.

5.2 Searching for contacts

You can search for a contact by name or phone number. Contacts in the private list are automatically displayed as you type in the search box.

To search in the System Directory, follow the steps below:

Step by Step

1) Click **Contacts** on the navigation bar.
2) Click at the top right of the Contacts panel.
3) Enter the name or number in the search field of the contact area and press **Enter**.

If you are connected to your MS Office account and you are searching for a contact, the search results will also include contacts in your Outlook Private Contacts List. The Outlook contacts will be displayed separately, at the end of the search result.

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

5.3 Grouping contacts

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

Step by Step

1) Click **Contacts** on the navigation bar.
2) Click at the top right of the Contacts panel and select **Create new Group**.
   The Organize contacts in personal groups view is displayed.
3) Enter a a name for the group in the **Group Name** field.
4) Enter the name of phone number of the contact you want to add to the group in the Search for the contact or number field, then click on it.

   Repeat this step if you want to add more contacts.
5) Click **Save**.

A new group is created and you can access it in the **My Groups** area.

6 Conferences

The OpenScape UC Application supports the following conference types:

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

6.1 Creating a scheduled conference

You can create a scheduled conference that starts at a specific time and date. Scheduled conferences are active during the configured time or as long as the conference is ongoing.

Follow the steps below to create a scheduled conference:

Step by Step

1) Click **Conferences** on the navigation bar.

The conferences area is displayed.

2) Click.

3) In the **Conference info** view enter the following information:

a) Enter the title of the conference in the **Title** field.

b) If you want to created a moderated conference, enable the **This conference is moderated** checkbox.

c) If you want all participants to provide their name before joining the conference, enable the **Record name** checkbox.

d) To schedule the conference for a specific duration, enable the **Set time for conference** checkbox.

e) In the **Add new participants to the conference** field, enter the name of the participant/s you want to add to the conference. Click on their user name to add them to the conference.

You can configure the following settings for each participant.

- Set one or more participants as moderators by selecting the checkbox next to their name.
- Specify the device on which a participant is called in case of **Dial Out Conferences** in the Device area.
- Set participants as call in or call out in the **Call In/out** area.

  Call out participants are automatically called when the conference starts, while call in participants can only join the conference by dialing in.

4) Click **Create**.

A new conference is created and you can find in the Conferences panel.

6.2 Creating a persistent Conference

You can create persistent conferences that can be started anytime. After the conference ends, you can start it again at a later time.

Step by Step

1) Click **Conferences** on the navigation bar.

   The conferences area is displayed.

2) Click on the **Persistent** tab and click ✚ **New Conference**.

3) In the **Conference info** view enter the following information:
   a) Enter the title of the conference in the **Title** field.
   b) If you want to created a moderated conference, enable the **This conference is moderated** checkbox.

      A moderator can assign the moderator role to other conference participants while the conference is in progress via the Conference Participants List view.

      A moderator role can also be assigned by a Moderator to another participant during a running conference. Go to the Conference Participants List View

      Guest participants can only share media during the conference if a moderator has enabled the video and sharing capabilities for them.

      NOTICE:

      If OpenScape UC has been deployed with Individual Video View Layout, all participants can start a screen sharing session or steam video. This is valid for moderated conferences too.

   c) If you want all participants to provide their name before joining the conference, enable the **Record name** checkbox.
   d) To schedule the conference for a specific duration, enable the **Set time for conference** checkbox.
   e) Click on the **Add new participants to the conference** field. Start typing the name of the person(s) you want to add in the conference and click on their user name.

      You can configure the following settings for each participant.

      - Set one or more participants as moderators by selecting the checkbox next to their name.
      - Specify the device on which a participant is called in case of **Dial Out Conferences** in the Device area.
      - Set participants as call in or call out in the **Call In/out** area.

        Call out participants are automatically called when the conference starts, while call in participants can only join the conference by dialing in.

4) Click on **Create**.

A new conference is created and you can find in the Conferences panel.

6.3 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.

6.4 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.

6.5 Using Mouse Pointer and Comment Pointer during WebRTC Screen Sharing

If 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.

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.

6.6 Requesting Desktop Remote Control during WebRTC Screen Sharing

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 use the UC Desktop Application or Fusion for Office.

Step by Step

1) Click 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**.

6.7 Conference Guest Access

When you are creating a conference, it is possible to provide a link in order to allow any external participant to join the conference. These participants are guest participants to the call and the 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. To use the guest access feature, your system administrator must enable the WebRTC option on your system.

6.7.1 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 that has been provided to you.

   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 the devices you want to use in the conference:
   a) Under **Audio output**, choose an audio devices from the drop-down list (e.g. your headset).

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

      If an OpenScape UC administrator has enabled the video effects feature on your system, you can also 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 39.

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 40.

6.7.2 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.

Prerequisites

- An OpenScape UC administrator has enabled the video effects feature on your system.

Step by Step

1) Click ⋮ **Communication options** on the call control bar.
2) Select **Audio and Video settings** 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 according to your needs.
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 ⋮ **Communication options** 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.

6.7.3 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) Hover over the participant's name you want to grant media permissions to.
2) Click ☰ and select **Allow media sharing**.

The guest user can start sharing media.

6.8 Initiating a Large Conference

You can start a conference with all the subscribers you are currently connected to on your terminal device by using the Large conferences option.

Prerequisites

You have set up several simultaneous phone connections.

Step by Step

1) Click ⅄ on the call control bar of a phone connection.

   A menu with connection options is displayed.
2) Select **Merge calls together**.

All calls are combined into a conference.

6.9 Conference Call Control

The conference view displays basic information, such as the number of conference participants. You can use the options on the call control bar to display further conference details.

Click Show Details ∨ on the call control bar to expand it and show the conference participants' details. The currently active speaker is highlighted with green.

The Conference Call control buttons are the following:

Call control button	Description
	Display/Hide the List of Participants
	Mute/Unmute your audio
	Display DTMF dialing
	Start whiteboard
	Start/Stop Screen Sharing
	Start video streaming
	Raise hand
	Add conference participant
	- Start chat
	Communication options: • **Email to participant(s)** • **Add to my notes** • **Invitation** • **Mute conference** • **Lock conference** • **Record conference** • **Drop conference**
	Drop call

6.9.1 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.

6.9.2 Conference view layout options

The Active Speakers layout is displayed in the main view of the conference call. The current active speaker's window is highlighted with green.

During a conference you can control the conference view according to your preferences using the following buttons:

- - display/hide the list of participants
- - display/hide the active speakers view
- - display/hide video view of active speakers

6.9.3 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 are available to conference participants based on their system deployment, which can be one of the following:

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

In moderated conferences, moderators can select the video layout to be displayed to participants. The following layouts are available: Single View or Tile Based View.

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

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

To display the video layout buttons bar, hover your mouse over the video layout section. The video layout buttons bar are displayed on the left of your interface and includes the following buttons, that appear depending on your system deployment:

Call control button	Description
Single view	Display a single participant’s video screen.
Active speaker view	Display the active speaker(s) video screen.
Tile based view	Display the basic video layout in tiles.
Statistics view	Display the statistics of the video conference.

7 Voicemail

7.1 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.

7.2 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 ▶.

7.3 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.

8 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.

8.1 Creating a Team

Create teams and invite contacts to be members.

Step by Step

1) Click in the contacts area and select **Create new Team**.
2) Configure the new team's details and add contacts from the **Search Directory.**
3) Click **Save**.

The contacts you have invited are displayed under **Invited users** and will receive an invitation. When a contact accepts your invitation, it will appear under the **Members** list and you will be notified.

9 Messages

You can easily send messages to a contact or a group of contacts.

9.1 Initiating a chat

You can start a chat with a contact.

Step by Step

1) Move the mouse pointer onto the contact in the contact list to see additional controls.
2) Click ⋮ **Communication options** and then select **Chat**.

The chat window opens in a minimized format at the bottom screen margin.

9.2 Displaying your chat history

To display your chat history, click **Messages** on the navigation bar.

9.3 Pinning a chat conversation

You can pin one or more chat conversations and access them directly from the navigation bar. You can pin up to 5 chat conversations.

Step by Step

1) Click **Messages** on the navigation bar.
2) Locate the chat conversation you want to pin and click on it.
3) Click on the top right of the chat.

The chat conversation you have pinned is displayed below the **Messages** tab.

To unpin a chat conversation at any time, open the chat again and click on the top right.

9.4 Adding users to a chat

You can easily add more participants to a 1-to-1 chat.

Prerequisites

- You are conducting a chat.
- The additional chat participants are contacts with valid IM (Instant-messaging) addresses.
- The IM status of the additional chat participants is **Available**.

Step by Step

1) Click **Messages** on the navigation bar.
2) Locate the chat conversation to which you want to add more participants and click on it.
3) Click on the top right of the chat and select **Add people to your chat** from the drop-down menu.

   A dialog window opens allowing you to search for additional chat participants. You can add participants from your private contact list or from the user directory.
4) Enter the full or partial first name, last name or phone number of the contact you are searching for into the search field.
5) Press `Enter` to search for a contact.

   The search results display the list of contacts that matches your search (if any).
6) Click on the desired contact in the search results list, then click **Next**.
7) Enter a name for the new chat in the **Chat name** field and click **Done**.

A new chat conversation is created, and you can exchange messages with the additional contacts you have added.

9.5 Adding an attachment to a chat

You can send and receive attachments when communicating with others in a chat conversation.

You can send an attachment in one of the following ways:

- Click at the right of the new message box and select the file you want to send.
- Copy the file you want to send and paste it into the new message box.
- Drag and drop the file you want to send in the new message box.

You can only send one attachment at a time.

In a chat conversation with attachments, you can view a mini preview of attached files. You can also click on an attachment to view it in extended mode (in case of an image file) or download it locally.

All attachments in a chat conversation are available in the **Files** tab.

9.6 Deleting a chat message

You can easily delete a chat message that you have sent if you no longer want it to appear in the chat conversation. You can only delete one message at a time.

Step by Step

1) Locate the chat message you want to delete and click **...** at the bottom right.
2) Select **Delete** from the drop-down menu.
3) Click **Yes** to confirm that you want to delete the message.

The message is no longer visible to you and the other chat participants.

9.7 Leaving a group chat

You can leave a group chat that you no longer want to participate in.

Step by Step

1) Click **Messages** on the navigation bar.
2) Hover over the chat conversation to want to leave and click **...** on the right.
3) Select **Leave chat** from the drop-down menu.

The chat is removed from the **Messages** tab. The other chat participants will be notified that you have left the chat.

Once you leave a chat, you can no longer see the chat history. You can only access the chat history if one of the participants adds you again.

9.8 Starting and using the chat in a 1-to-1 call

During a 1-to-1 call, you can use the chat panel to exchange messages, links or attachments with the other call participant.

To start the chat in a 1-to-1 call, you can click on the call control bar. The chat panel opens and you can start exchanging message or view previous chat messages (if any).

The following actions are possible using the chat:

- Type a new message in the new message box and send it by clicking or by pressing the `Enter` key.
- Send an emoji, by clicking on the right of the new message box.
- Add attachments, by clicking on the right of the new 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 the call participants, including their name and the time of sending..
- **Files**: contains all attachments shared in the chat.

After the call ends, you can view the messages and attachments shared during the call and exchange further messages. For this, click **Messages** on the navigation bar, locate the chat conversation you want to view and click on it.

NOTICE:

The **Messages** 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.

You can hide the chat panel when you no longer want to display it during the call. For this, click again on the call control bar. The chat panel will no longer be displayed to you, but the other call participant will still be able to see it.

9.9 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.

9.9.1 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 make the chat panel appear larger on your call screen by disabling some of the active call panels.

9.9.2 Using the chat during a conference call

During a conference call, participants can use the chat panel to exchange messages, links or attachments.

Participants can use the chat during a conference call to:

- Type a new message in the new message box and send it by clicking or by pressing the `Enter` key.
- Send an emoji, by clicking on the right of the new message box.
- Add attachments, by clicking on the right of the new message box.
- Delete chat messages, by clicking **...** > **Delete** at the bottom of the message.

Conference participants who are part of the chat will be able to see the following tabs in the chat panel:

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

9.9.3 Hiding the chat during a conference call

As a conference participant (guest or non-guest participant), you can hide the chat when you no longer want to see it or you want other panels to appear larger. For this, click on the call control bar.

The chat panel will no longer be displayed to you, but the other call participant will still be able to see it.

9.9.4 Adding a guest user to the conference chat

By default, if a chat session has been started during a conference call, the chat is not displayed to guest participants. Guest participants can only view or use the chat if a moderator added them to it.

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

Prerequisites

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

Step by Step

1) Click on the call control bar and select **Guest participant(s)** from the drop-down menu.

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

2) Hover over the name of the participant you want to add to the chat.

   The icon appears next to the participant's name.

3) Click and select **Add to chat** from the drop-down menu.

The guest participant is added to the chat and they can start using the chat.

Guest participants can use the chat in the same way as non-guest participants. For more information about actions using the chat, see Using the chat during a conference call on page 49.

9.9.5 Viewing chat messages after a conference ends

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

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 **Conferences** on the navigation bar.

2) Click **Records**.
3) Select the conference for which you want to view the chat history.

   The following tabs are displayed:

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

> **NOTICE:**
>
> The **Records** 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.

9.10 Searching for chats

You can easily search through the list of chats you are part of to find a specific one.

Step by Step

1) Click **Messages** on the navigation bar.
2) Click on the top right of the messages area.
3) Select the one of the available search options from the drop-down menu.
   - **Chat name**: search for chats by the chat name.
   - **Current chat**: search only in the current chats list.
   - **All chats**: search in all chats.
4) Enter a search term in the search field and press `Enter`.

The search results display the list of chats that matches your search (if any).

9.11 Forwarding chat messages

You can forward a message from one chat to another or to your notes space.

> **NOTICE:** You can only forward one chat message at a time.

Follow the steps below to forward chat messages:

Step by Step

1) Click **Messages** on the navigation bar.
2) Locate the chat conversation from which you want to forward a message and click on it.

3) Click **...** at the bottom right of the message, then select one of the available options:

a) If you want to forward a message to an existing chat, select **Forward to a chat** and select the desired chat.

b) If you want to forward a message to a new chat, select **Forward to a chat**, then click **+ Forward to a new chat** in the top right of the screen.

If you select this option, you are prompted to select between creating a 1-to-1 chat or a group chat. The new chat is created and the message is forwarded.

c) If you want to forward a message to your notes, select **Forward to My Notes**.

Alternatively, you can copy the text of a message and send it manually in a chat or to your notes. For this, click **...** at the bottom right of the desired message, select **Copy text** and paste it in the desired location.

Messages that have been forwarded appear in the chat with the text **Forwarded**.

10 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.

10.1 Adding, using 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 an active conference call, click on the call control bar.

The whiteboard is displayed.

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

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

The whiteboard tools available are described in the following table:

Table 1: Whiteboard tools

Whiteboard tool	Description	How to use it
	Take picture	Capture a picture of the whiteboard.
	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.

When you select **Take picture**, you can see a preview of the picture and the actions you can do with it. For more information about the options available, see Integrating whiteboard with other features on page 70.

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 again on the call control bar.

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

11 Surveys

The surveys 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.

11.1 Creating a survey

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

Step by Step

1) Click **Surveys** on the navigation bar.

   The surveys created previously (if any) are displayed in this area.
2) Click + at the top right of the **Surveys** panel.

   The survey creation page opens with the following two tabs:

   - **Designer**: you can create questions using the survey elements.
   - **Preview**: you can 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 a survey element from the toolbox displayed on the left.
- 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 drop-down 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 in the **Description** field.
- Click on the right side of the survey title to add 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 clicking **Required**.

  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, 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** at the bottom right of the screen.

A new survey is created and you can view it in the **Surveys** panel. Once created, a new survey is in the **Ready** status.

11.2 Editing a surveys

After creating a survey, you can review and modify the survey questions at any time.

Step by Step

1) Click **Surveys** on the navigation bar.

   The surveys created previously are displayed in this area.

2) Locate the survey you want to edit and click on it.

   The survey questions and settings are displayed in preview mode.

3) Click at the top right of the screen.
4) In the **Designer** tab, remove, add or edit the existing questions and settings according to your needs.
5) Optionally, navigate to the **Preview** tab view the survey changes and test the functionality.
6) Once you finish editing the survey, click **Save** at the bottom right of the screen.

The survey is saved and you can view it in the **Surveys** panel. Once edited, the survey is in the **Ready** status.

11.3 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.
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 **Close** at the bottom-right of the survey window. A pop-up message is displayed asking for exit confirmation, then the survey is no longer displayed.

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

Next steps

The survey initiator can stop a survey at any time by clicking **Stop survey**.

11.4 Sending survey invitations

You can invite users to take part in a survey by sending them an email invitation that includes a link to the survey. The recipients of the invitation can access the survey using the link until the specified expiration date.

Step by Step

1) Click **Surveys** on the navigation bar.

   The list of available surveys is displayed.
2) Hover over the survey for which you want to sent an invitation and click .

3) Click **Yes** to confirm that you want to create a survey invitation.

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

4) Click the survey expiration field and select the date by which survey responses can be submitted.

5) Send the survey invitation in one of the following ways:

   - Click **Copy** to copy the text of the invitation and send it manually to specific users.
   - Click **Send mail to participants** to send a survey invitation to specific users via email.

     Your default email client opens 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.

11.5 Survey responses

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

- By clicking the survey for which you want to view responses in the **Surveys** panel
- During a conference call, by clicking **Show results**.

11.5.1 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**.

A new window opens and you can view the survey details (title, expiration date, number of responses), the survey 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 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.

11.5.2 Showing survey responses

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

- A survey that has been distributed to specific users via invitations.
- A surveys that has been started during a conference call and 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 **Surveys** on the navigation bar.

The list of available surveys is displayed.

2) Locate the survey for which you want to view results and click on it.

The details of the survey and the results collected (if any) are displayed on the right side of the screen.

If you no longer want to view the survey results, click **Hide Responses**.

11.5.3 Clearing survey responses

You can clear the responses collected for a survey when you no longer need them.

Only the UC user who has created and started the survey can clear the survey results.

Step by Step

1) Click **Surveys** on the navigation bar.

   The list of available surveys is displayed.

2) Hover over the survey for which you want to clear results and click ⋮.
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 no longer view them. To collect new responses, you must start again the survey.

11.5.4 Printing survey responses

You can print or save the responses collected for a survey and view them at a later time.

Step by Step

1) Click **Surveys** on the navigation bar.

   The list of available surveys is displayed.

2) Hover over the survey for which you want to print responses and click ⋮.
3) Select **Print Responses** from the drop-down list.

   The survey responses are displayed in a new window.

4) Click at the top right of the screen and select one of the options available:
   - Save the survey responses as a PDF file.
   - Print them using a printer connected to your computer.

11.6 Deleting a survey

You can easily delete a survey that is no longer needed.

Step by Step

1) Click **Surveys** on the navigation bar.

   The list of available surveys is displayed.

2) Hover over the survey you want to delete and click .

   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.

12 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.

12.1 Viewing the Hands Up

When multiple participants raise their hands, they are added to the **Hands Up** list, which displays their names in the order they raised their hands.

You can view the **Hands Up** list by clicking the yellow box below the call control bar. This box displays the name of the first participant who raised their hands, a hand icon and a red counter. The counter indicates the total number of participants who raised hands.

The **Hands Up** list includes both guest and non-guest participants whose hands are raised and the total number of hands up.

You can also view the participants who have their hands raised in the active participants panel:

1) Click on the call control bar.
2) Select **Active participants** from the drop-down menu.

   The list of active participants is displayed and a hand icon appears next to the participants who have their hands raised.

12.2 Raising your hand during a conference

During a conference, you can click the button on the call control bar to announce that you want to speak. Once your hand is raised, the button turns red for you.

If you are the first participant who raised their hand, your name is displayed in a yellow box below the call control bar and a hand icon appears next to your name.

If you are not the first participant who raised their hand, you can view the following:

- The name of the first participant who raised their hand, in a yellow box below the call control bar and a hand icon next to their name.
- A red counter with the total number of hands raised.

  The counter is updated every time a participant raises or lowers their hand. For example, if two participants have raised their hands, the counter shows .

Once you raise your hand, all other conference participants receive a notification that your hand is up, at the bottom right of their screen.

> **NOTICE:** The hands up notification is only displayed if the UC client is in focus mode.

> **NOTICE:** Participants do not receive a notification when raising their own hand.

You can view the list of all participants who raised their hand in the **Hands Up** list. For more information about viewing the **Hands Up** list, see Viewing the Hands Up on page 63.

Conference moderators need to 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.

12.3 Lowering your hand during a conference

During a conference, you can click again the button on the call control bar to announce that you no longer want to speak.

When you lower your hand:

- The button turns white for you.
- The counter with the total number of hands up decreases.

  > **NOTICE:** If no other participant has their hand raised, the counter is no longer displayed.

- Your name is no longer displayed in the **Hands Up** list.

  For more information about the **Hands Up** list, see Viewing the Hands Up on page 63.

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

12.4 Lowering hands as a moderator

Moderators can lower hands for participants who have already spoken, allowing others to speak as well.

> **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) Click the yellow box below the call control bar with the name of the first participant who raised their hands.

   The **Hands Up** list is displayed on the left side of the conference screen.

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

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

3) Click to lower participant's hand.

When moderators lower a participant's hand:

- The button turns white 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 63.
- The counter with the total number of hands up decreases.

> **NOTICE:** If no other participant has their hand raised, the counter is no longer displayed.

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

13 My notes

My notes is a temporary chat repository where you can store notes, files and images for yourself.

You can populate your notes space during a conference call or when you are idle.

The following UC clients support this feature: WebClient, UC Desktop App and Fusion for Office.

13.1 Adding to My Notes during a conference call

During a conference call, you can add information that you want to access later to your notes space.

NOTICE: This feature is only available to UC users.

You can add a note during a conference call in one of the following ways:

Procedure

- During a screen sharing session:
  1) Hover over the screen sharing area.
  2) Click 📷 at the top left.

     A picture of the shared screen is displayed.
  3) Select **Add to my notes** from the drop-down menu.

     The picture is added to your notes space.
- During a whiteboard session:
  1) Select 📷 from the whiteboard tools.

     A picture of the whiteboard is displayed.
  2) Click **...** at the top right of the screen.
  3) Select **Add to my notes** from the drop-down menu.

     The picture is added to your notes space.
- Using a key combination:
  1) Press the `Alt` and `J` keys on your keyboard at the same time.

     The **Add to My Notes** window opens.
  2) Add a new note.

     You can add text, emojis or attach files.
  3) Click **Add** or press `Enter`.

     The note is added to your notes space.

- Using the call control bar:
  1) Click ⋮ on the call control bar.
  2) Select **Add to My Notes** from the drop-down menu.
  3) Add a new note.

     You can add text, emojis or attach files.
  4) Click **Add** or press `Enter`.

     The note is added to your notes space.

All notes are available in the **My notes** area of your UC client.

13.2 Viewing notes in My notes

You can view the notes you have saved in **My notes** at any time.

Step by Step

1) Click **Messages** on the navigation bar.
2) Click **My Notes** in your messages list.

   The **My Notes** space is displayed on the right side of the screen.

   The following tabs are displayed in **My Notes**:

   - **Messages**: contains all notes you have added to **My Notes**, including text notes, emojis or attachments.
   - **Files**: contains all attachments available in **My Notes**.

You can also pin the **My Notes** space and access it directly from the navigation bar. For more information, see Pinning My Notes.

13.3 Creating a new note in My notes

You can easily create a new note in your notes space.

Step by Step

1) Click **Messages** on the navigation bar.
2) Click **My Notes** at the top of your messages list.

   The **My Notes** space is displayed on the right side of the screen and you can view the notes created previously (if any).
3) Click + in the top right of the screen.
   A pop-up window is displayed and you can type a new message, insert an emoji or add an attachment to your notes.
4) Add a new note, then click **Add** or press `Enter`.

The note is added to your notes space.

13.4 Deleting a note from My notes

You can delete notes that you no longer want to keep in your notes space.

NOTICE: You can only delete a note at a time.

Follow the steps below to delete a note:

Step by Step

1) Click **Messages** on the navigation bar.
2) Click **My Notes** in your messages list.

   The **My Notes** space is displayed on the right side of the screen.
3) Locate the note that you want to delete and click **...** at the bottom right of the note.
4) Select **Delete** from the drop-down menu.
5) Click **Yes** to confirm the action.

The note is removed from **My notes**.

13.5 Forwarding a note

You can forward a note from your notes space to another chat.

NOTICE: You can only forward one note at a time.

Follow the steps below to forward a note:

Step by Step

1) Click **Messages** on the navigation bar.
2) Click **My Notes** in your messages list.

   The **My Notes** space is displayed on the right side of the screen.
3) Locate the note that you want to forward and click **...** at the bottom right of the note.
4) Select **Forward to a chat** from the drop-down menu.
5) Select where to forward the note:
   a) To forward the note to an existing chat, select the desired chat from the list of chats.
   b) To forward the note to a new chat, click + at the top right of the **Forward to** area, the select between creating a 1-to-1 chat or a group chat.

Alternatively, you can copy the text of a note and send it manually in a chat. For this, click **...** at the bottom right of the note, select **Copy text** and paste it in the desired chat.

Notes that have been forwarded appear in the chat with the text **Forwarded**.

14 Features integrations

During a conference call, you can use specific features separately or in combined mode.

The following features can be used together: screen share, whiteboard, chat in a conference and My notes.

14.1 Integrating screen share with other features

During a screen sharing session in a conference call, participants can capture a picture of what is being shared and do one of the following actions:

- Add the picture to **My Notes**
- Add the picture to the conference chat
- Add the picture to the whiteboard
- Set the picture as background for the whiteboard
- Download the picture locally

Prerequisites

- A conference participant shares their screen.

Follow the steps below to use the integration between screen share and other features:

Step by Step

1) Hover over screen sharing area and click at the top left..
A pop-up window is displayed and you can view a picture of the shared screen and the actions you can do with it.

2) Select one of the available actions:

a) Click **Add to my notes** to add the picture to your notes.
The picture is added to your notes space. For more information, see My notes on page 66.

b) Click **Add to chat** to send the picture as an attachment in the conference chat.
The picture is added to the conference chat and it will be available in the **Files** tab. For more information about the chat in conference feature, see Starting, using and adding to chat during a conference call on page 49.

c) Click **Add to whiteboard** to display the picture inside the whiteboard.
The picture is added to the whiteboard and you can use the whiteboard tools to edit it. For more information about using the whiteboard, see Adding, using or hiding the whiteboard in a conference call on page 53.

d) Click **Set as whiteboard background** to add the picture as background for the whiteboard.

e) Click **Download** to save the picture locally.

14.2 Integrating whiteboard with other features

During a whiteboard session in a conference call, participants can capture a picture of what is being displayed inside the whiteboard and do one of the following actions:

- Add the picture to My notes
- Add the picture to the conference chat
- Add the picture to the whiteboard
- Set the picture as background for the whiteboard
- Download the picture locally

Prerequisites

- A non-guest conference participant starts the whiteboard.

Follow the steps below to use the integration between whiteboard and other features:

Step by Step

1) Select from the whiteboard tools.
A pop-up window is displayed and you can view a picture of the whiteboard and the actions you can do with it.

2) Select one of the available actions:

a) Click **...** at the top right of the screen and select **Add to my notes** to add the picture to your notes.
The picture is added to your notes space. For more information, see My notes on page 66.

b) Click **...** at the top right of the screen and select **Add to chat** to send the picture as an attachment in the conference chat.
The picture is added to the conference chat and it will be available in the **Files** tab. For more information about the chat in conference feature, see Starting, using and adding to chat during a conference call on page 49.

c) Click **Add to whiteboard** to display the picture inside the whiteboard.
The picture is added to the whiteboard and you can use the whiteboard tools to edit it. For more information about using the whiteboard, see Adding, using or hiding the whiteboard in a conference call on page 53.

d) Click **Set as whiteboard background** to add the image as background for the whiteboard.

e) Click **Download** to save the picture locally.

15 Call quality indicator

The call quality indicator (ıIl) shows the quality of audio, video and screen sharing connections during an active call (conference call or one-on-one call).

The indicator shows up to three bars:

- Three bars: call quality is high and all values are within the expected range.
- Two bars: call quality is medium, some values are below the expected range.
- One bar: call quality is low, several values are below the expected range or packet loss is high.
- No bars: call quality is poor, most indicators are below the expected range or packet loss is very high.

15.1 Viewing call quality metrics

While on an active call (conference call or one-on-one call) you can check the quality of the connection using the call quality indicator (ıIl). Call metrics are displayed for the following connection types: audio, video and screen sharing.

Call quality statistics are available after the call is established and for as long as the call is active.

Prerequisites

- You have joined the call using the WebClient or UC Desktop App, with WebRTC resource.

  NOTICE: UC Desktop App only supports this feature on Windows operating systems.

- You are using the WebClient from within Goggle Chrome or Microsoft Edge browsers.

To view the call quality statistics of an active call, click ıIl on the left on the all control bar. A pop-up window with the call statistics appears.

The following values are collected in real time for **Upstream** and **Downstream**:

- **Used bandwidth** is measured in kilobits per second and indicates the bandwidth used by the connection.
- **Packets lost** is calculated as the percentage of packets that don't make it from the other party in the call.
- **Jitter** is measured in milliseconds as the variation between packet delays.
- **Latency** is measured in milliseconds as the amount of time it takes for a packet to be sent and for the acknowledgment of the packet to be received.

Values exceeding their threshold are displayed with a warning sign.

When the quality of the connection is poor, the following warning message is displayed above the call control bar: **Low network performance is detected**. If the quality of the connection improves, the message is no longer displayed.

15.2 Rating call quality

At the end of an active call, you can rate the overall quality of the connection.

Prerequisites

- An OpenScape UC administrator has enabled the rating call quality feature on your system.

The rating call quality dialog is displayed to UC users who have joined the call using the WebClient or UC Desktop App. The metrics for how often the call rating dialog is presented are determined based on the settings that your OpenScape UC administrator has configured on your system.

When the rating dialog appears, you can rate the call quality on a scale of 1 to 5 stars, where more stars means better experience.

To rate a call, select the number of stars that describes your call experience the best, then click **Submit** on the pop-up window. Your rating is registered and it will be used to for performance improvements.

If you want to skip the rating, click **Cancel** on the pop-up window.

16 Rules Profiles

You can use profiles to determine how rules are handled. For example, you can define profiles to be applied in a specific meeting scenario or if you are on a business trip.

The following actions are possible using profiles:

- Define a presence state to be set when the profile is active.
- Assign one or more rules to be applied when the profile is active.
- Set the sequence in which the rules are applied.

IMPORTANT:

Only one profile can be active at a time.

NOTICE:

The profiles **SmartClient rules** and **Standard Profile** are auto-generated profiles which are created for imported rules, in case of migrations from previous versions. If you unassign the rules associated with these profiles, the profiles will be automatically hidden.

16.1 Creating a Rules Profile

Step by Step

1) Click your user name at the top right of the screen.

2) Select **Forwarding and rules settings** from the drop-down menu.

3) Select the **Profiles** tab and click **+ Add a new profile**.

4) Configure the new profile:

a) In the **Profile name** section, enter a name for the profile.

b) In the **Set presence status** section, select the presence status to be set when the profile is active from the **Choose Presence** drop-down menu.

c) In the **Rules of the profile** section, select the rule that you want to include in the profile from the **Rules** drop-down menu.

The **Rules** drop-down menu includes the rules you have set. You can add one or more rules to a profile.

When multiple rules are added to a profile, you can modify the sequence of the rules according to your need.

5) Click **Add profile**.

A new profile is created and the icon appears on the task bar.

16.2 Editing a Rules Profile

Step by Step

1) Open the **Profiles** tab in one of the following ways:

- Click your user name at the top right of the screen and select **Forwarding and rules settings** > **Profiles**.
- Click ↳ on the top right of the task bar and select **Forwarding and rules settings** > **Profiles**.

2) Hover over the profile you want to edit and click ✎.

3) Edit the profile configuration according to your need.

4) Click **Save profile**.

16.3 Activating/Deactivating a Rules Profile

Step by Step

1) Click ↳ on the top right of the task bar.

2) Follow one of the procedures below:

- To activate a profile, locate the desired profile in the drop-down menu and click on it.

  The profile is activated and a ✓ icon appears next to it.
- To deactivate a profile, select **Deactivate profile** from the drop-down menu.

  The profile is deactivated and the ✓ icon is not displayed anymore.

16.4 Deleting a Rules Profile

You can easily delete profiles that are no longer needed.

NOTICE: Before deleting a profile, you must deactivate it first.

Step by Step

1) Open the **Profiles** tab in one of the following ways:

- Click your user name at the top right of the screen and select **Forwarding and rules settings** > **Profiles**.
- Click ↳ on the top right of the task bar and select **Forwarding and rules settings** > **Profiles**.

2) Hover over the profile you want to delete and click **X**.

The profile is removed from the profiles list.

17 Forwarding and Rules

The OpenScape UC Application can automatically analyze incoming calls and route them to a specific contact or terminal, according to forwarding or rules settings. 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:

- Simple Forwarding settings:
  - Depending on whether the phone line is busy, the incoming call is unanswered or unconditional forwarding.
- Profiles
  - Depending on one or more forwarding rules defined in the desired profile.
- Rules:
  - Depending on the caller's phone number.
  - Depending on the date or time at which the call comes in.
  - Depending on your presence status.

The OpenScape UC Application also supports **Backward Compatibility** with rules created in previous OpenScape UC releases.

17.1 Creating a Simple Forwarding

You can forward your incoming calls to other phone lines (e.g. home phone, a meeting room or a secretary office) when your phone line is busy, when you do not answer or for all calls without conditions.

IMPORTANT:

The option of simple forwarding is only available when the preferred device is set on the work phone, that is the number configured by the system administrator as your primary number (ONS) in OpenScape UC. If you set another phone as preferred device, like your mobile phone, the simple forwarding doesn’t take effect and the call will be redirected to this phone.

Simple forwarding is always valid until they are canceled or overwritten by a rule.

NOTICE:

Phone line busy is different of user presence busy. Phone line busy is when your PBX phone line is not free to answer a call, like already busy in other call, ringing in a call or even when a desk phone device is off-hook. The user presence busy is a user availability status, that is not only for when the user is in a call, but can be set manually by the user in many other situations, like to denote he is busy taking notes, busy in a presentational meeting or at lunch break.

So, the simple forwarding doesn’t consider the user presence busy status, but the phone line busy status. User presence is a criteria considered by rules, as you will see in the next chapter.

Step by Step

1) Click your user name at the top right of the screen.

2) Select **Forwarding and rules settings** from the drop-down menu.

3) In the **Simple forwarding** tab, select one of the available options:

   a) If you want to forward all your incoming calls to the voicemail box, click **I want to redirect all my calls to my Voicemail**.

   b) If you want to forward all your incoming calls to another colleague, enter your colleague's name or phone number in the **Always forward** input field.

   c) If you want to forward incoming calls to another colleague only when your phone line is busy, enter your colleague's name or phone number in the **Forward when busy** input field.

   d) If you want to forward incoming calls to another colleague only when you don't answer them, enter your colleague's name or phone number in the **Forward when no response** input field.

4) Click **Save**.

A new forwarding rule is created.

Next steps

To stop forwarding your incoming calls to another colleague, go to **Forwarding and rules settings** > **Simple forwarding**, hover over the forwarding destination you have set and click **X**, then **Save**.

17.2 Creating a Rule

You can set up forwarding rules for a specific time range, caller phone number, contact list or presence status.

For example, you can forward your calls to a meeting room when your presence status is “In Meeting” or to your mobile phone when your presence is “Away”. For more information about user presence, see Setting your Presence Status on page 18.

Based on the Time and Range condition, you can make the rules valid for specific days of the week, for an entire day or for a specific period of time.

You can set multiple conditions at the same rule.

IMPORTANT:

The forwarding rules bypass the preferred devices and simple forwarding settings.

Step by Step

1) Click your user name at the top right of the screen.

2) Select **Forwarding and rules settings** from the drop-down menu.
3) Select the **Rules** tab and click **+ Add new Rule**.
4) Configure the new rule:
   a) In the **Name** section, enter a name for the rule.
   b) In the **Time and range** section, select the time frame for the rule.
   c) In the **If my status is** section, select the presence status to be triggered for the rule.
   d) In the **If call is from** section, select whether the rule applies for a contact, a group of contacts or both.
   e) In the **Forward to** section, select where to forward the calls.
5) Click **Add rule**.

The new rule is created.

For the rule to be applied, you need to assign it to a Rules Profile. For more information on Rules Profiles, see Creating a Rules Profile.

17.3 Editing a Rule

Step by Step

1) Open the **Rules** tab in one of the following ways:
   - Click your user name at the top right of the screen and select **Forwarding and rules settings** > **Rules**.
   - Click ↳ on the top right of the task bar and select **Forwarding and rules settings** > **Rules**.

   NOTICE: This option is only displayed if at least one Rules Profile is available.

2) Hover over the rule you want to edit and click ✎.
3) Edit the rule configuration according to your need.
4) Click **Save rule**.

17.4 Disabling a Rule

Follow the steps below to disable a rule that has been assigned to a profile:

Step by Step

1) Open the **Profiles** tab in one of the following ways:
   - Click your user name at the top right of the screen and select **Forwarding and rules settings** > **Profiles**.
   - Click ↳ on the top right of the task bar and select **Forwarding and rules settings** > **Profiles**.

   NOTICE: This option is only displayed if at least one Rules Profile is available.

2) Hover over the profile which contains the rule you want to disable and click ✎.
3) In the **Rules** section, click **X** next to the rule you want to disable.
4) Click **Save profile**.

The rule is no longer associated with the profile.

Alternatively, if you deactivate a profile, the rule/s associated with it are automatically deactivated.

17.5 Deleting a Rule

You can delete a rule.

Step by Step

1) Open the **Rules** tab in one of the following ways:
   - Click your user name at the top right of the screen and select **Forwarding and rules settings** > **Rules**.
   - Click ↳ on the top right of the task bar and select **Forwarding and rules settings** > **Rules**.

     NOTICE: This option is only displayed if at least one Rules Profile is available.
2) Hover over the rule you want to delete and click **X**.

18 MS Office 365 Integration

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

- Access Outlook 365 personal contacts directly from OpenScape UC. See chapter Searching for contacts on page 33 for more details.
- Display the “Out of Office” notification for Outlook 365 contacts in one of the following ways:
  - During a call to the Outlook 365 contact, the ✈ icon appears on the call control, next to contact's name. You can click the icon to read the notification.
  - In the call history, the ✈ icon appears in the call details area. You can click the icon to read the notification.
  - In contact's details area, the **Out of Office** link is displayed below the contact name. You can click the link to read the notification.

Prerequisites

- Your system administrator has enabled the Microsoft Office 365 integration on your account.

Step by Step

1) Click your user name at the top right of the screen.

2) Select **Settings** from the drop-down menu.

3) Select the **Contacts** tab.

4) In the **Microsoft Office 365 integration** area, click **Connect**.

You are prompted to sign in to your Office 365 account.

5) Allow all required permissions.

NOTICE: Only one connection to Microsoft Office 365 per client session is possible.

19 UC and OpenScape Add-ins Integration

OpenScape UC can be integrated with Microsoft Outlook via the OpenScape Add-ins integration.

For detailed information on how to configure and use the OpenScape Add-ins integration, please refer to the *OpenScape UC Application V10, OpenScape Add-ins, User Guide*.

20 Using the DesktopApp on MacOS

To use the UC DesktopApp on macOS, the user need to grant permissions to:

- Camera
- Microphone
- Screen Recording
- Automation

Follow the steps below to grant the permissions:

Step by Step

1) Open the **System Preferences** on your macOS device and select **Security & Privacy** settings.
2) Open the **Camera** tab and allow the UCDesktopApp to access the camera on your device.
3) Open the **Microphone** tab and allow the UCDesktopApp to access the microphone on your device.
4) Open the **Screen Recording** tab and allow the UCDesktopApp to record the contents of your screen.
5) Open the **Automation** tab and allow the UCDesktopApp to control other apps on your device.

21 Installing the DesktopApp on MacOS

The setup writes information about the installation process for troubleshooting purposes in a serialized system file. The file location is: **/var/log/install.log**

22 Troubleshooting the DesktopApp on MacOS

You can troubleshoot the DesktopApp on macOS using UCDesktop traces and WebClient UI traces.

To view the UCDesktop traces, right-click in the UCDesktopApp system tray and select **Settings - Open Log Folder**.

To view the WebClient UI traces, press the **Options**, **Control** and **X** keys. This shortcut will open the Debugger Window.

23 Usage Restrictions

The following restrictions apply:

- Currently only supported in Windows Operational Systems
- The use UC Desktop App in parallel with OSC UC WebClient, Fusion or the old Desktop Integration tool is not supported.
- For displaying all of its elements in the main window, UC Desktop App requires a display surface of 1024×768 pixels
- The following applies in the scope of the team function:

  Even if team calls are displayed to you in the client, you cannot pick up such a call if your preferred device (OND) is not idle. This is still not possible even if your preferred device (OND) signals the call.
- You must clear the cache and restart you browser after a HotFix update, in order to avoid slow performance on the OpenScape Web Client.
- The rule merging strategy is for users of WebClient 1.0 moving to the new UI.
- Browsers and languages:

  Each browser is using a different logic / source to investigate the user’s language.

  – Internet Explorer (11) uses the regional setting in control panel which also define date format and currency for the OS (regardless of the language configured in Internet Explorer settings).
  – Firefox uses the language defined in the language list in the browser setting.
  – Chrome uses the language of the Chrome UI (regardless of the language list in Chrome settings).
- Browser limitations

  Chrome66 uses the "Chrome's autoplay policy", which only allow the websites to play sounds if the user interacts with the webpage first.

24 Settings

24.1 Audio and Video Settings

When using WebRTC as the preferred device, you can perform Audio and Video Calls using your UC Desktop App as a softphone.

To check the settings of the audio and video devices to be used, click on your login name in the header bar and select **Settings** > **Audio/Video**.

24.1.1 Using Video effects

You can use video effects to change your background in video calls or conferences or when you are idle.

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.

Prerequisites

- An OpenScape UC administrator has enabled the video effects feature on your system.

Step by Step

1) Click on your login name in the header bar, then click **Settings**.

2) Navigate to the **Audio/Video** tab.

The **Video effects** are displayed in the drop-down menu below the camera preview window. By default, when no video effect is selected, the value is set to **None**.

3) Click the **Video Effects** drop-down menu and select an effect from the list.

The following video effects are available: **Blur**, **Office**, **Room**, **Shelf**, **Painting**, **Company**.

4) Click **Save**.

Your background is updated and you can see it in the camera preview window.

24.2 Supported Headsets

The UC Desktop app is compatible with Jabra, Epos/Sennheiser, Poly/ Plantronics, Gigaset ION, Logitech and Yealink headsets (call control buttons through HID interface).

NOTICE:

Please note that usage of the same headset by two different applications (e.g. running UC Desktop App and Microsoft

Teams) may lead to unexpected behaviors in certain scenarios, such as dropping calls.

In this case you can disable the headset controller for OpenScape UC Desktop App via the Settings section described in section Exclusive tab for Desktop App settings of this document.

24.3 Accessibility Features

OpenScape Web Client supports multiple Accessibility Features thus making the client more accessible to users with visual or mobility impairment.

The Accessibility features are:

- **Screen reader support**
- **Keyboard-operable interface**: Keyboard shortcuts can be used to automate tasks in JAWS.
- **Visible keyboard focus**
- **High contrast text**

24.3.1 Enabling the visual keyboard indicator

This feature helps keyboard-only users and people with attention limitations that need a clear focus indicator to navigate easily through the interactive elements of Web Client.

Step by Step

1) Click your user name and navigate to **Settings > General > Accessibility**.

2) Check the **Display a colored frame around the element on focus** box.

A coloured frame is displayed around the element on focus.

24.3.2 Activating High Contrast

This feature can help users with vision impairment and people with little or color perception issues to be able to read text easier.

Step by Step

1) Click your user name and navigate to **Settings > General > Accessibility**.

2) Check the **Enable high contrast mode for the header bar** box.

The header part in the top of your web browser, should be significantly darker compared to the grey color used by default:

24.3.3 Using the Screen Reader feature

This is an advanced technology that can help visually impaired users navigate the Web Client’s interface with the assistance of audio. Currently, only JAWS is supported

Step by Step

1) Open your Screen Reader program.

2) In your Web Client interface, navigate to any tab, contact or option.

You will hear the automatic screen reader voice reading out loud the elements in your client’s interface or your selected item.