A MITEL
PRODUCT
GUIDE

Mitel OpenScape UC Application V11

OpenScape Web Client

User Guide

03/2025

A31003-S50B0-U119-01-7619

Contents

1 About this Document......6
1.1 History of Changes......6
1.2 About this Document......6
1.3 Markups used......6
1.4 Acronyms used......6

2 Getting Started......8
2.1 Overview of the Client......8
2.2 Structure of the User Interface......8
2.3 Usage Restrictions......9
2.4 Logging On......10
2.5 Logging Off......11
2.6 Determining your Preferred Device......11
2.7 Setting your Presence Status......11

3 Calls......13
3.1 Receiving a call......13
3.2 Calling a contact......13
3.3 Calling a directory contact......13
3.4 Dialing feature codes......14
3.5 Rejecting a call......14
3.6 Terminating an active call......14
3.7 Placing a call on hold......14
3.8 Transferring a call......15
3.8.1 Transferring a call with consultation......15
3.8.2 Transferring a call......15
3.9 Pushing an ongoing call to desk phone......16
3.10 Alternating between calls......16
3.11 Making a video call......17
3.12 Call pickup......17
3.13 Call history......17
3.14 Call quality indicator......18
3.14.1 Viewing call quality metrics......18
3.14.2 Rating call quality......19

4 Contacts......20
4.1 Creating a new contact......20
4.2 Searching for contacts......20
4.3 Grouping contacts......20

5 Conferences......22
5.1 Creating a scheduled conference......22
5.2 Creating a persistent Conference......23
5.3 Initiating screen sharing......24
5.3.1 WebRTC Screen Sharing in a call to an external contact......24
5.4 Using Mouse Pointer and Comment Pointer during WebRTC Screen Sharing......25
5.5 Requesting Desktop Remote Control during WebRTC Screen Sharing......25
5.6 Conference Guest Access......26
5.6.1 Joining a Conference using a Guest Access link......26
5.6.2 Changing audio/video settings for guest users......27
5.6.3 Granting media sharing permissions to guest users......27
5.7 Initiating a Large Conference......28

5.8 Moving participants from a Large to Rich Conference........ 28
5.9 Conference Call Control........ 28
5.9.1 Conference view layout options........ 29
5.9.2 Video view layout options........ 29
5.9.3 Active Conference Tab and Avatars........ 30
5.9.4 Options menu for conferences........ 30
5.9.5 Conference invitation........ 31
5.9.6 Automatic connection to conferences via UC softphones........ 31
5.10 Searching for conferences........ 31

6 Voicemail........ 32
6.1 Displaying your Voicemails........ 32
6.2 Playing a Voicemail........ 32
6.3 Using the Voicemail Greeting Feature........ 32

7 Team Feature........ 34
7.1 Creating a Team........ 34

8 Messages........ 35
8.1 Displaying your chat history........ 35
8.2 Searching for chats........ 35
8.3 Creating a 1-to-1 chat........ 35
8.4 Initiating a chat........ 36
8.5 Creating a group chat........ 36
8.6 Adding users to a chat........ 36
8.7 Pinning a chat conversation........ 37
8.8 Adding an attachment to a chat........ 37
8.9 Deleting a chat message........ 38
8.10 Forwarding chat messages........ 38
8.11 Leaving a group chat........ 38
8.12 Starting and using the chat in a 1-to-1 call........ 39
8.13 Starting, using and adding to chat during a conference call........ 40
8.13.1 Starting the chat during a conference call........ 40
8.13.2 Using the chat during a conference call........ 40
8.13.3 Hiding the chat during a conference call........ 40
8.13.4 Adding a guest user to the conference chat........ 41
8.13.5 Viewing chat messages after a conference ends........ 41

9 Whiteboard........ 43
9.1 Adding, using or hiding the whiteboard in a conference call........ 43

10 Surveys........ 45
10.1 Creating a survey........ 45
10.2 Editing a surveys........ 47
10.3 Starting a survey during a conference call........ 47
10.4 Sending survey invitations........ 48
10.5 Survey responses........ 49
10.5.1 Showing survey results during a conference call........ 49
10.5.2 Showing survey responses........ 50
10.5.3 Clearing survey responses........ 50
10.5.4 Printing survey responses........ 51
10.6 Deleting a survey........ 51

11 Hands Up........ 53
11.1 Viewing the Hands Up........ 53
11.2 Raising your hand during a conference........ 53
11.3 Lowering your hand during a conference........ 54
11.4 Lowering hands as a moderator........ 54

12 My notes..... 56
12.1 Adding to My Notes during a conference call..... 56
12.2 Viewing notes in My notes..... 57
12.3 Pinning My Notes..... 57
12.4 Creating a new note in My notes..... 58
12.5 Deleting a note from My notes..... 58
12.6 Forwarding a note..... 58

13 Features integrations..... 60
13.1 Integrating screen share with other features..... 60
13.2 Integrating whiteboard with other features..... 61

14 Forwarding and Rules..... 62
14.1 Creating a Simple Forwarding..... 62
14.2 Call Forwarding for internal/external call originators..... 63
14.3 Rules..... 64
14.3.1 Creating a Rule..... 64
14.3.2 Editing a Rule..... 65
14.3.3 Disabling a Rule..... 65
14.3.4 Deleting a Rule..... 66
14.4 Rules Profiles..... 66
14.4.1 Creating a Rules Profile..... 67
14.4.2 Editing a Rules Profile..... 67
14.4.3 Activating/Deactivating a Rules Profile..... 67
14.4.4 Deleting a Rules Profile..... 68

15 Headset integration..... 69
15.1 Supported headsets and restrictions..... 69
15.2 Downloading and installing Headset Integration..... 70
15.3 Enabling the headset integration..... 70

16 Settings..... 71
16.1 Audio and Video Settings..... 71
16.1.1 Using Video effects..... 71
16.2 Adding a new device..... 71
16.3 Options to make and receive calls..... 72
16.3.1 Outgoing calls..... 72
16.3.2 Incoming calls..... 73
16.4 Changing your password..... 73
16.4.1 Resetting your Password..... 74
16.4.2 Password Expiration Notification..... 74
16.5 Accessibility Features..... 74
16.5.1 Enabling the visual keyboard indicator..... 75
16.5.2 Activating High Contrast..... 75
16.5.3 Using the Screen Reader feature..... 75

1 About this Document

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

1.1 History of Changes

Date	Changes	Reason
05-12-2024	Create V11 document	

1.2 About this Document

This document addresses end users who deploy OpenScape Web Client 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

2 Getting Started

This chapter describes the first steps to start using the UC Web client.

2.1 Overview of the Client

Using the client you can deploy OpenScape UCApplication features with a browser.

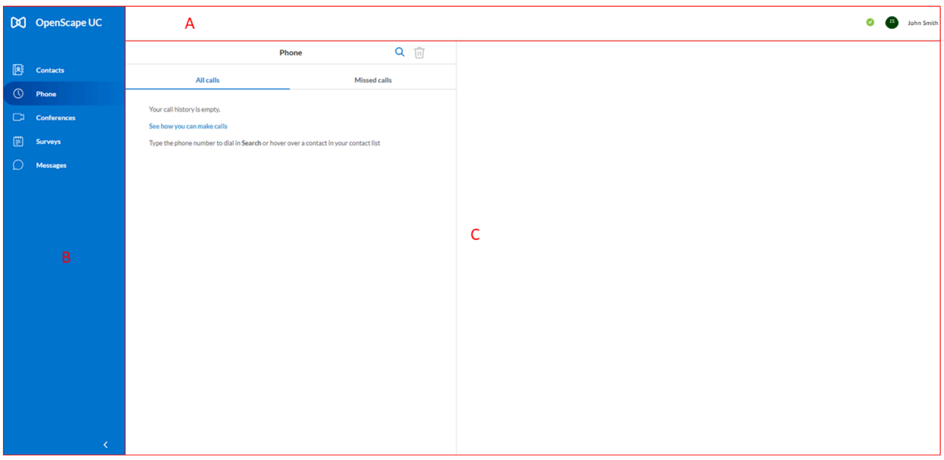
The client provides in particular the following features:

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

2.2 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.

Section	Description
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.
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.

2.3 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:

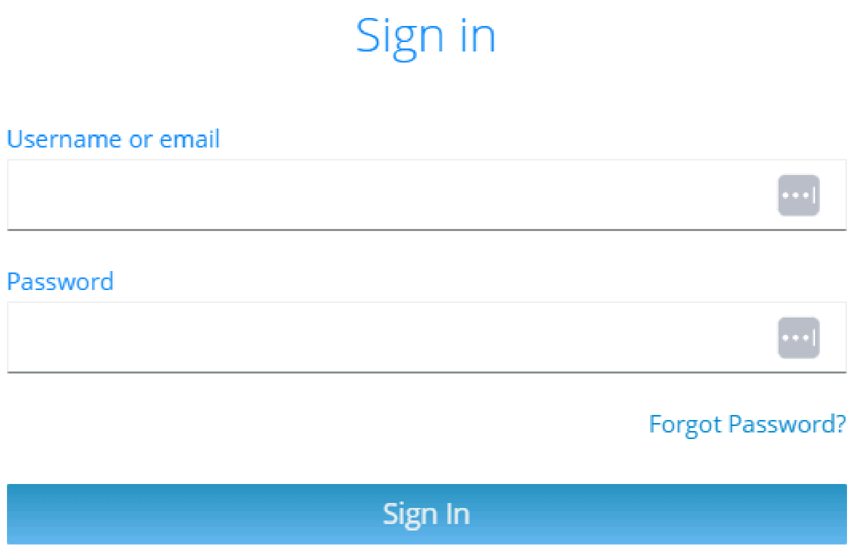
  Each browser is using a different logic / source to investigate the user's language.

  – 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.

2.4 Logging On

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 Web Client the user interface is displayed.

IMPORTANT: If a new UC user is added in CMP and, subsequently, the first login on the WebClient is performed, the full registration will be completed after 10 minutes. The client will be fully functional only after 10 minutes.

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.

2.5 Logging Off

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**.

2.6 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 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**.

3 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

3.1 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.

3.2 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.

3.3 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.

3.4 Dialing feature codes

You can dial features codes (DARs) from your UC clients (for all types of endpoints) and WebRTC clients to activate or deactivate features.

In case of OpenScape UC with OpenScape 4000, the following DARs are available:

1) **Hunt group in/out**

   Example for hunt group in:

   - The AHTVCE WABE code for *hunt in* is *13.
   - An UC user (12100) who wants to change the hunt group status needs to dial *13.

   NOTICE: There is no UI element in UC to mark the hunt group status (IN or OUT).

2) **Number/name suppression on/off**

   Example of number suppression:

   - The activation code for number suppression ON is *50.
   - An UC user (12100) who wants to call another UC user (13100) with number suppression needs to dial *5013100.

3.5 Rejecting a call

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

3.6 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.

3.7 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.

3.8 Transferring a call

You can transfer an active call to another person with or without consultation.

3.8.1 Transferring a call with consultation

You can speak with the person you want to transfer the call to before actually transferring the call.

While on an active call:

Step by Step

1) Click **Search for contact to call or transfer** on the call controls.
2) Enter the name or phone number you want to transfer the call to and click .

   A list of suggested contacts is displayed.
3) Click or press Enter.
4) Select a contact from the list.
5) Click **Consultation Call**.
6) The first call is put automatically on hold so you can talk privately with the third party.

   The first call's information appears at the top of the call screen, including the word `Holding` so that you know the call is on hold. The second call appears at the bottom of the call screen and is currently the active call.

The call is transferred and you are disconnected.

3.8.2 Transferring a call

You can transfer a call to another person.

While on an active call:

Step by Step

1) Click **Transfer** on the call controls.
2) Enter the name or number you want to transfer the call to and click.

   A list of suggested contacts is displayed.

3) Click or press Enter.
4) Select a contact from the list.
5) Click **Transfer Call**.

The call is transferred and you are disconnected from the call.

3.9 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.

3.10 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.

3.11 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.

3.12 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.

3.13 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

3.14 Call quality indicator

The call quality indicator (ıll) 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.

3.14.1 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 (ıll). 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 ıll 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.

3.14.2 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.

4 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.

4.1 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.

4.2 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.

4.3 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.

5 Conferences

The OpenScape UC Application supports the following conference types:

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

5.1 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.

5.2 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.

5.3 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 60.

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.

5.3.1 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.

5.4 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.

5.5 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**.

5.6 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.

5.6.1 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 27.

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 27.

5.6.2 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.

5.6.3 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.

5.7 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.

5.8 Moving participants from a Large to Rich Conference

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

Prerequisites

You participate an active Large Conference

Step by Step

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

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

5.9 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

5.9.1 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

5.9.2 Video view layout options

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

These options 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.

5.9.3 Active Conference Tab and Avatars

All active conferences are available in the **Active** tab of the **Conferences**.

The **Active** tab displays the following information about active conferences:

- The title of the conference;
- The elapsed time;
- The conference participants;
- The creator of the conference.

Each conference is displayed using a colored avatar.

5.9.4 Options menu for conferences

The options menu is available for active and non-active conferences.

To access the options menu, click the ☰ icon.

For active conferences, the options menu allows users to:

- Chat with conference participants;
- Email conference participants;
- Invite users to the conference;
- Display the list of active participants.

For non-active conferences, the options menu allows users to:

- Chat with conference participants;

- Email conference participants;
- Invite users to the conference;
- Set a new conference PIN.

5.9.5 Conference invitation

The conference invitation includes instructions for users who want to join a conference.

A conference invitation displays the following information:

- The creator of the conference;
- The date and time when the conference will take place;
- The conference PIN;
- The link that can be used for joining the conference.

5.9.6 Automatic connection to conferences via UC softphones

When using the UC softphones, the users are able to connect to conferences with one single click.

To automatically connect to a conference, navigate to the **Conference** section and click on the conference you want to join.

5.10 Searching for conferences

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

Step by Step

1) Click in the left navigation bar to open the **Conferences** tab.
2) Click on the top right of the conferences view.
   A pop-up window containing a search field is displayed.
3) Enter the title of the conference you are searching for in the search field and press Enter.

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

6 Voicemail

6.1 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.

6.2 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 ▶.

6.3 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.

7 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.

7.1 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.

8 Messages

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

8.1 Displaying your chat history

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

8.2 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).

8.3 Creating a 1-to-1 chat

You can easily create a 1-to-1 chat with yourself and one other contact.

Step by Step

1) Click **Messages** on the navigation bar.
2) Click + at the top right of the **Messages** panel.
3) On the drop-down that appears, select **1-to-1 chat**.
4) Enter the full or partial first name, last name or phone number of the contact you to add to the chat and press `Enter`.

   The search results display the list of contacts that matches your search (if any).
5) Click on the desired contact in the search results list.
6) Click **Create**.

A new 1-to-1 chat is created and you can find it in the **Messages** list.

8.4 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.

8.5 Creating a group chat

You can easily create a group chat with yourself and two or more other contacts.

Step by Step

1) Click **Messages** on the navigation bar.
2) Click + at the top right of the **Messages** panel.
3) On the drop-down that appears, select **Group chat**.
4) Enter a name for the group chat in the **Chat name** field.
5) Enter the full or partial first name, last name or phone number of the contacts you to add to the chat one by one and then press `Enter`.

   The search results display the list of contacts that matches your search (if any).
6) Select all contacts that you want to start a group chat with.
7) Click **Create**.

A new group chat is created and you can find it in the **Messages** list.

8.6 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.

8.7 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.

8.8 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.

8.9 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.

8.10 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**.

8.11 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.

8.12 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.

8.13 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.

8.13.1 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.

8.13.2 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.

8.13.3 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.

8.13.4 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 40.

8.13.5 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 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.

9.1 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 61.

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.

10 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.

10.1 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.

10.2 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.

10.3 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**.

10.4 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.

10.5 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**.

10.5.1 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.

10.5.2 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**.

10.5.3 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.

10.5.4 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.

10.6 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.

11 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.

11.1 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.

11.2 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 53.

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.

11.3 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 53.

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

11.4 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 53.
- 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.

12 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.

12.1 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.

12.2 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 on page 57.

12.3 Pinning My Notes

You can pin the **My Notes** space and access it directly from the navigation bar.

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) Click at the top right of the screen.

The **My Notes** space is added to the navigation bar, below **Messages.**

Next steps

You can click at any time to remove the **My Notes** space from the navigation bar.

12.4 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.

12.5 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**.

12.6 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**.

13 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.

13.1 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 56.

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 40.

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 43.

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

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

13.2 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 56.

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 40.

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 43.

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

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

14 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.

14.1 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**.

14.2 Call Forwarding for internal/external call originators

You can configure additional forwarding rules for your internal and external incoming calls.

Prerequisites

- An OpenScape UC administrator has enabled call forwarding for internal/external call originators on your system.

  When this feature is enabled for you, a new option is available under **Forwarding and rules settings** > **Simple forwarding** that allows you to configure call forwarding for internal and external incoming call originators.

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, click the checkbox next to the **Check to distinguish internal from external calls** option to enable call forwarding for incoming calls based on their origin (internal or external).

   By enabling this option, the following additional forwarding options are displayed:

   - **External to**: only your incoming calls that come from external originators are forwarded to another phone number.
   - **Internal to**: only your incoming calls that come from internal originators are forwarded to another phone number.

4) Configure call forwarding according to your needs.
5) Click **Save**.

Your incoming calls are now forwarded based on your configuration.

Next steps

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

14.3 Rules

You can create rules to determine how your incoming calls are handled in specific conditions. Each rule can be assigned to one or more profiles.

14.3.1 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 11.

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.

14.3.2 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**.

14.3.3 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.

14.3.4 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**.

14.4 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.

14.4.1 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.

14.4.2 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**.

14.4.3 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.

14.4.4 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.

15 Headset integration

OpenScape Web Client supports headset integration via Headset Service Standalone. This allows you to control OpenScape UC calls directly from a range of headsets.

IMPORTANT: Headset Service Standalone should not be used on the same machine where UC Desktop App is installed.

Headset integration allows you to use your device's control buttons to:

- Answer/end a call
- Reject a call (for supported headset models)
- Mute/unmute
- Volume up/down

Prerequisites

- An OpenScape UC administrator has enabled the headset integration on your system.

You can download the headset integration from the **Settings** > **General** area on your UC client.

15.1 Supported headsets and restrictions

OpenScape Web Client is compatible with the following headsets: Jabra, Sennheiser/EPOS, Poly/Plantronics, and Yealink.

NOTICE: The usage of the same headset by two different applications (e.g. OpenScape Web Client and Microsoft Teams) may lead to unexpected behaviors in certain scenarios, such as dropping calls.

For specific headsets, you must install additional software, as described in below:

Additional software
Plantronics Hub software
Sennheiser/EPOS EPOS Connect software

Restrictions

- Headset integration is only supported on Windows machines.
- Call controls via your headset are supported when you are using OpenScape Web Client with Google Chrome or Microsoft Edge.

15.2 Downloading and installing Headset Integration

You need to download and install the headset integration to make the integration available on your UC client.

Prerequisites

- You have installed .NET Framework (version 4.7.2 or newer).

Step by Step

1) In your UC client, click your user name, then select **Settings** > **General**.
2) Locate the **OpenScape Headset integration** area and click **Download OpenScape Headset**.

   A `zip` file containing the integration files is downloaded to your computer.
3) Locate the `zip` file (usually in the Download folder) and extract it.

   The following file is extracted: `uc-headset`.
4) Double-click on the `OpenScape.HeadsetService.Setup.exe` file to start the installation process.
5) Follow the instructions on the installation wizard to install the integration.

Next steps

After you have installed the headset integration, you can enable it on your UC client. For more information, see .

15.3 Enabling the headset integration

Follow the steps below to enable the headset integration on your client:

Step by Step

1) In your UC client, click your user name, then select **Settings** > **Audio/Video**.
2) Locate the **Headset integration** area and tick the check box next to **OpenScape Headset integration**.
3) Click **Save**.
   A pop-up message appears and you are prompted to open the OpenScape Headset Service.
4) Click **Open OpenScape Headset Service** in the pop-up message.

The headset integration is enabled on your client and you can use it to control UC calls.

If the OpenScape Headset Service doesn't start or is disconnected unexpectedly, a warning message is displayed in OpenScape Web Client and you are prompted to try connecting the service again.

16 Settings

16.1 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**.

16.1.1 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.

16.2 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.

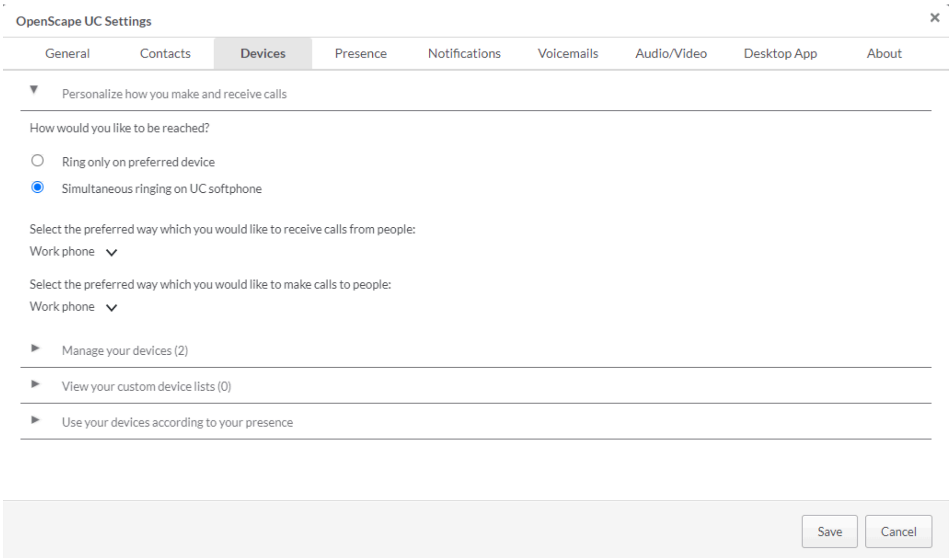
2) Select the **Devices** tab.

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.

16.3 Options to make and receive calls

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



16.3.1 Outgoing calls

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

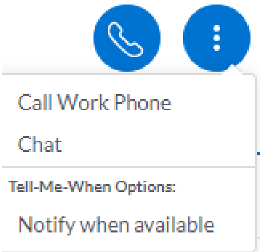
- Use the outgoing preferred device;
- Bypass the preferred device setting and use the UC softphone device;
- Choose the device from a menu prompted for every outgoing call.

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.

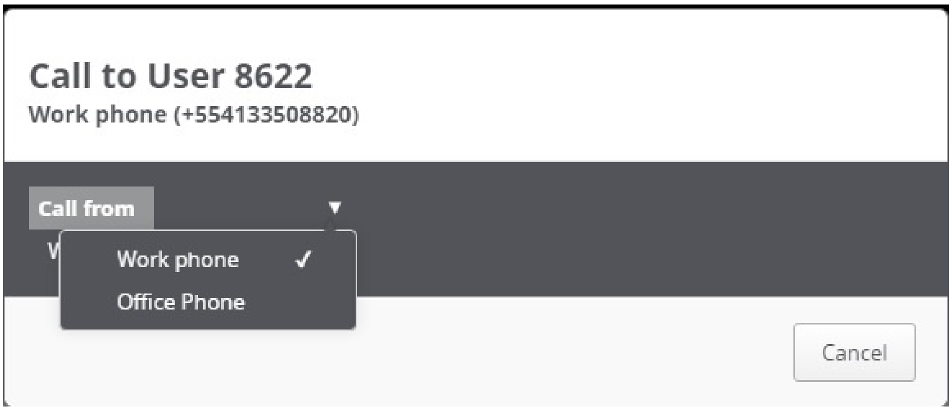
Each time the user chooses a different device in the prompt, the outgoing preferred device changes.

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:



16.3.2 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.

16.4 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**.

16.4.1 Resetting your Password

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

Follow the steps below to reset your password:

Step by Step

1) On the login screen of your Web Client, click **Forgot your password**.

2) In the input field, enter the email address associated with your account and click **Reset my password**.
If the email address corresponds to an existing user, an email will be delivered to your inbox, containing a password reset link.

3) Click the password reset link delivered to your email address.
The password reset link is valid for 15 minutes. After expiration, you need to request a new password reset.

4) Enter a new password for your account in the **New password** field. Confirm your choice by re-entering your password in the **Confirm new password** field.

The new password must have a minimum length of 8 characters and must contain at least an upper-case letter, a number and a special character.

5) Click **Save new password**.
You can now use the new password to login to your account.

16.4.2 Password Expiration Notification

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

- An email sent to the email address associated with your account.
- A warning displayed in your OpenScape Web Client.

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

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

To set a new password, refer to Resetting your Password on page 74.

16.5 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**

16.5.1 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.

16.5.2 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:

16.5.3 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.