A MITEL
PRODUCT
GUIDE

Unify OpenScape UC Application V10

OpenScape Web Client

Extended Guide

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Mitel

Notices

Trademarks

Contents

1 About this Document

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

1.1 History of Changes

Date	Changes	Reason
2019-10-01	Created Document:	UCBE-19556
2019-10-03	Added: - 4.18 Accessibility Features	UCBE-19452
2020-03-27	Updated: - 4.3 Notifications	UCBE-22406
2020-05-19	Updated 4.12.1.7 How to Pin a Chat Conversation	UCBE-22406
2020-06-05	Added: - 4.11 New Voicemail Greeting Feature	UCBE-23566
2021-01-26	Added - 4.1.8 Audio and Video Settings	UCBE-25800
2021-02-18	Added: - Web Collaboration using Fastviewer sections - Web Collavoration using WebRTC Screen Sharing	UCBE-25924
2021-05-05	Added - Note about announcements during conferences	UCBE-25803
2021-08-12	UC V10R3 New features	
2021-09-28	Updated: - 4.9.22 How to Mute an Active Conference	UCBE-28085
2021-10-11	UC V10 R3 New content	UCBE-28295
2022-05-02	UC V10 R4 New content	UCBE-29224
2022-09-05	UC V10 R4 New content	UCBE-30061
2023-06-16	UC V10 R5 New content	DOCLOC-6799
2023-11-16	Simultaneous ring feature	UCBE-33639

1.2 Whom we address with this Document

This document addresses end users who deploy OpenScape Web Client.

We assume the reader to have the following knowledge for making full use of the information provided:

- Knowledge of terms commonly used in the environment of communications solutions.
- Knowledge of how to generally operate a computer.
- Knowledge of how to generally operate your browser.

NOTICE:

For more information regarding UC WebClient features and details please refer to the *OpenScape UC Application V10 OpenScape Web Client, Extended User Guide*.

1.3 Structure of this Document

This document is structured as follows:

Chapter 1 – About this Document

This chapter contains general information about this document. You can use this information to orientate yourself in the document, thus quickly finding your topics of interest.

Chapter 2 – Overview of the Client

This chapter provides a short overview of the client's features.

Chapter 3 – First Steps

This chapter facilitates your becoming familiar with the client. It describes the first steps to take for using the client.

Chapter 4 – Using the Client Features

This chapter describes how to use the single features of the client.

1.4 Symbols used

In this document we use the following markings to draw you attention to specific contents.

IMPORTANT:

Denotes information of high priority. Please definitely read and heed such notes to avoid malfunctions culminating in damaged devices and a possible loss of data.

NOTICE:

Denotes information worth knowing or useful tips.

1.5 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**

Element	**Markup**
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>

1.6 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
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

Acronym	Meaning
XML	Extensible Markup Language

2 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

- Managing calls
- Managing your preferred device of OpenScape UCApplication
- Logging calls in a call history
- Accept team calls

Conference features

- Creating and initiating persistent audio and web conferences
- Initiating scheduled audio, video, and web conferences

> **NOTICE:**
>
> You can set up these conferences with the conference extensions for Microsoft Outlook or IBM Notes.

- Controlling audio, video, and web conferences (floor control)

Contact features

- Creating and organizing private contacts
- Finding contacts in the connected directory of OpenScape UCApplication
- Copying contacts from the connected directory of OpenScape UCApplication to the private contacts
- Synchronizing contact data copied from the connected directory of OpenScape UCApplication to the private contacts

Presence features

- Managing and displaying user presence
- Displaying device presence

Instant Messaging

- Chats with single or more than one communication partners

Voicemail features

- Managing voicemails from OpenScape Xpressions

Security features

- Access control by user name and password
- Application of the OpenScape UCApplication password policy
- Option for encrypted communication with the OpenScape UCApplication server

User Profiles

According to the permissions set by the system administrator, you may or may not have access to certain features described above. The following user profiles may be configured by the administrator including different permissions:

1) **Essential**: Users with the essential profile can record local calls, access their calendar, mailbox and E-mail via the voice portal, use video communication and the dialing via contacts feature and voicemail access via native OpenScape services.
2) **Professional**: Users with the professional profile can record local calls, use ad hoc conferences, instant messaging, presence status, simplified rules, as well as access their calendar, mailbox and E-mail via the voice portal, video communication, the dialing via contacts feature and voicemail access via native OpenScape services.

Further reading:

For more information regarding UC WebClient features and details please refer to the *OpenScape UC Application V10 OpenScape Web Client, Extended User Guide*.

2.1 Usage Restrictions

The following restrictions apply for using the client:

- You cannot use the client parallel to OpenScape Web Client V1.
- The Web Client does not support multiple sessions. In other words, you should not open several browser sessions for the same user, as several services, such as the presence service, may be affected. The same applies for parallel access with the OpenScape Web Client 1.0, OpenScape Desktop Client and OpenScape Fusion.
- For displaying all of its elements in the web browser the client requires a display surface of 1024 × 768 pixels.

  This display surface is just about reached when you maximize the Internet Explorer10 window and display only the menu bar at a screen resolution of 1024 × 768 pixels.
- You cannot use the client in the web browser's private operating mode (for example **Private Browsing** in Mozilla Firefox or **InPrivate** in Microsoft Internet Explorer).
- You must not enforce the Compatibility View in the Internet Explorer.
- The **Disable script debugging** setting must be active in the Internet Explorer.
- We recommend the following sizes for contact pictures:
  – 24 × 24
  – 32 × 32
  – 42 × 42
  – 56 × 56
  – 72 × 72

  If pictures are used in a size different from the above, the client will convert them into the recommended sizes.

- 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.

  Example:

  User A with the ONS number *100* and *User B* with the ONS number *200* are members of the same team. *User A* configures the device with phone number *200* as the preferred device. User B deploys the device with his/her ONS number *200* as the preferred device (OND).

  A third user calls the phone number *100* and is forwarded to the device with phone number *200*. The device with phone number *200* rings and the call is offered in the client of *User B* for pickup.

  User B cannot accept the incoming call because his/her preferred device (OND) with phone number *200* is currently not idle; because: it signals an incoming 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.

  But Switching back and forth is definitely not supported.

  Different users from the same system can use different clients.
- Browsers and language

  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).

  A customer still can re-enable the language switcher in WebClientUI.cfg => ShowLanguageSwitch but should know that this would or could have a serious impact on performance and memory consumption of the browser.

  NOTICE:

  the WebClientUI.cfg can be modified only by the administrator.

- Browser limitations

  Chrome66 has introduced the "Chrome's autoplay policy", according to which the websites are only allowed to play sounds if the user interacts with the webpage first. An example of a real use case is when the WebRTC user locks the PC. In case of an incoming call, the user will not get an acoustic notification.

3 First Steps

This chapter facilitates your becoming familiar with the client. It describes the first steps to take for using the client.

The described first steps are:

1) How to Log On
2) How to Change your Password
3) How to Set your Presence Status
4) How to Add a Profile Picture
5) How to Determine your Preferred Device
6) How to Display your Call History
7) How to Accept a Call
8) How to Call a Phone Number
9) How to Call a Contact from the Directory
10) How to Copy a Contact from the Directory to your Private Contacts
11) How to Create a new Private Contact
12) How to Call a Private Contact
13) How to Display your Voicemails
14) How to Log Off

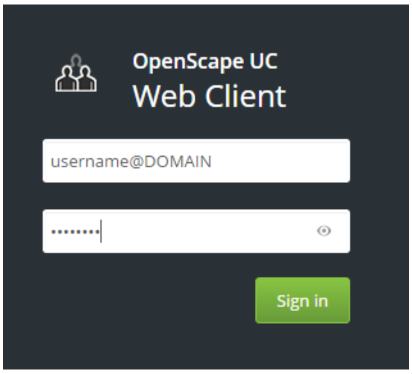
3.1 How to Log On

Before the user interface is displayed, you must log on.

Step by Step

1) Open your browser and invoke therein the address you received from your administrator.

   The login dialog is displayed.



2) Enter your user name for logging to the OpenScape UC Application in the user name field.

   Windows authentication:

   If the Windows authentication is active in your system, you can use your Windows login data for logging to the OpenScape UC Application. In this case you need to enter your Windows user ID in the username field of the OpenScapeWeb Client login dialog in the following format:

`<Windows domain name>\<Windows user name>` or

`<Windows user name>@<Windows domain name>`

You need to enter the associated Windows user password in the password field.

NOTICE:

In case windows login is used in OpenScape Web Client, the username must not include any spaces.

IMPORTANT:

The domain must be specified with capital letters.

E.g. MY_WEB.COM

If you do not know your user name, consult your administrator for further support.

3) Enter your password in the **Password** field.

If you do not know your password, consult your administrator for further support.

NOTICE:

Using in the **Password** field you can display the entered password in the clear text.

IMPORTANT:

Use only if no other person can see your entered password.

---

4) Select **Sign in**.

NOTICE:

Single Sign-On: If the Single Sign-On (SSO) feature has been configured for your Windows user account, the login dialog is not displayed. Single Sign-On enables you to use the features of the OpenScape UC Application via the OpenScape Web Client after logging in at your workstation without having to additionally authenticate against the OpenScape UC Application system

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You are signed in the OpenScape Web Client. You will be prompted to take a quick tour. You can select to skip the quick tour, or select to proceed and view a summary of the OpenScape Web Client capabilities. The quick tour is disabled if your browser is restored down and the OpenScape Web Client displayed in the mini view.

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.

3.2 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 in the header bar and select **Profile** > **Change password**.

2) Enter the new password and click **Save**.

3.2.1 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.

3.2.2 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 18.

3.3 How to Set your Presence Status

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

Step by Step

1) Select the icon of your current presence status – for example – in the header bar.

   The presence setting menu opens.

2) Select the presence status.

Your new presence status is displayed in the header bar.

3.4 How to Add a Profile Picture

You can add a profile picture that will be displayed next to your name. Profile pictures can be changed or removed.

Step by Step

1) Click on your login name in the header bar.

   The settings menu opens.

2) Select **Profile**.
3) Click on the profile picture icon.
4) Browse your local folder and select the required picture.

> **NOTICE:**
>
> The image size must not exceed 16 kB and the image must be available in one of the following formats: *.jpeg, *.png.

5) Click **Save**.
6) To remove the saved picture, move your mouse over the top right corner of the profile picture icon and click the delete icon.
7) To change the saved picture, click on it, select and save another picture from your local folder.

Your picture is displayed along with your name in the header bar.

Other users can view the picture uploaded along with your name in their contact list.

Users who have previously added you in their contact list will be able to see your picture after refreshing your profile information in the contact area.

3.5 How to Determine your Preferred Device

You can determine which of your devices is to signal icoming calls. Independent from this selection, you can also choose a device for initiating outgoing calls.

Step by Step

1) Click on your login name in the header bar and select **Settings**.

   The settings menu opens.
2) Switch to the **Devices** section.

   NOTICE:

   Alternatively, you can access the **Devices** section by clicking in the header bar and then select **Device settings.**

   ---
3) You can set your preferred device for incoming and outgoing calls independently from each other:
   - To determine your preferred device for incoming calls, select the desired entry under **How would you like to be reached?**
   - To determine your preferred device for outgoing calls, select the desired entry under **How would you like to make calls?**

   NOTICE:

   If your preferred device for outgoing calls is the same as the one used for the calls you receive, then you can check the box **Same as incoming calls**.

   ---
4) Click **Save**.

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

Alternatively, you can determine your preferred device also via or in the header bar. As a result, will be displayed if you have set the same device for incoming and outgoing calls and if the two settings differ: Click

1) Click or in the header bar.
2) Select the preferred device or device list under **Incoming Calls**.
3) Select the preferred device or device list under **Outgoing calls**.

NOTICE:

Changing the **Incoming device** via the drop down list will also change the **Outgoing device** to the same value.

For advanced control of preferred devices (additional option to keep preferred devices in sync or not) use the **Settings > Devices** options.

3.6 How to Display your Call History

You can display your call history in the content area.

Step by Step

Select  in the navigation bar.

Your call history is displayed in the content area.

If there are new call history entries you have not viewed yet, the number of these entries is displayed in a green square within the call history tab.

Since V9R1 sequential calls from the same person (as long as there are no call from another person in between) are grouped into one entry with the number of calls in paranthesis.

The details of each single call is visible in the detail view of the entry.

In case a call is forwarded or transferred several times, you see information only for the first and last connection.

The following descriptions are used in call history entries:

Description	Meaning
Forwarder to: <subscriber>	You forwarded an incoming call to **<subscriber>**.
Redirected to: <subscriber>	A call made by you was forwarded to and not accepted from **<subscriber>**.
Forwarded: <subscriber>	Incoming call forwarded to you by **<subscriber>** and not accepted.
Accepted from: <subscriber>	A call made by you was forwarded to and accepted from **<subscriber>**.
Accepted for: <subscriber>	A call forwarded to you by **<subscriber>** and accepted.
Picked up from: <subscriber>	An incoming call to you was picked up by **<subscriber>**.

3.7 How to Accept a Call

An incoming call is indicated with a signaling bar. Using the controls provided by this signaling bar you can react to the call.

Step by Step

How to accept a call:

NOTICE:

If the **Auto-Answer** feature is enabled for your preferred device, speaker and microphone of the terminal device or a connected headset become active automatically.

- If you wish to use the terminal device's receiver for the call, just pick it up to accept the call.
- If you wish to use speaker and microphone of the terminal device or a connected headset to accept the call, select in the signaling bar.

  Speaker and microphone of the terminal device or of a connected headset become active.

The connection is being established.

A call control bar opens, displaying the new connection.

NOTICE:

If you accept a call while being connected to another subscriber, the active call is placed on-hold.

3.8 How to Call a Phone Number

You can call a subscriber who is found neither among your private contacts nor in the directory. Simply dial his/her phone number.

Prerequisites

The contact area is displayed.

Step by Step

1) Enter the subscriber's phone number in the search field of the contact area.

NOTICE:

After typing the first or a combination of digits of the contact's telephone number in the search field, the system will display a matching contact or a list of contacts from the existing directory, to facilitate your search.

---

2) Select next to the search field.

NOTICE:

You can also press `SHIFT + ENTER`.

A signaling bar displays the connection setup.

Your preferred device rings.

3) How to accept a call:

> **NOTICE:**
>
> If the **Auto-Answer** feature is enabled for your preferred device, speaker and microphone of the terminal device or a connected headset become active automatically.

- If you wish to use the terminal device's receiver for the call, just pick it up to accept the call.
- If you wish to use speaker and microphone of the terminal device or a connected headset to accept the call, select  in the signaling bar.

  Speaker and microphone of the terminal device or of a connected headset become active.

The connection is being established.

A call control bar opens, displaying the new connection.

3.9 How to Call a Contact from the Directory

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

Prerequisites

The contact is present in the directory with a phone number.

The contact area is displayed.

Step by Step

1) Enter the search text in the search field of the contact area.

> **NOTICE:**
>
> After typing the first letters or a combination of letters of the contact’s name, the system will display a matching contact or a list of contacts from the existing directory, to facilitate your search. If your private contacts deliver search hits, they are displayed beneath the search field, continuously updated.

2) Select  beneath the search field and the private hit list.

> **NOTICE:**
>
> Alternatively, you can push the enter key.

The contact is searched for in the directory.

If search hits are found, they are displayed beneath the search field.

3) Move the mouse pointer onto the contact.

You see additional controls.

4) Select ☰.

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

5) Select a phone number for calling the contact.

   A signaling bar displays the connection setup.

   Your preferred device rings.

6) How to accept a call:

   NOTICE:

   If the **Auto-Answer** feature is enabled for your preferred device, speaker and microphone of the terminal device or a connected headset become active automatically.

   - If you wish to use the terminal device's receiver for the conference, just pick it up to accept the call.
   - If you wish to use speaker and microphone of the terminal device or a connected headset, select the call button in the signaling bar.

     Speaker and microphone of the terminal device or of a connected headset become active.

   The connection is being established.

   A call control bar opens, displaying the new connection.

You have called a subscriber whose contact data are available in the directory.

3.10 How to Copy a Contact from the Directory to your Private Contacts

You can find a contact in the directory and then copy him/her to your private contacts. As soon as you have copied a contact from the directory to your private contacts, he/she will automatically receive a request as to your monitoring his/her presence status. The user's answer will then decide whether or not you may see his/her presence status.

Prerequisites

The contact is present in the directory.

The contact area is displayed.

Step by Step

1) Enter the search text in the search field of the contact area.

   If your private contacts deliver search hits, they are displayed beneath the search field, continuously updated.

2) Select beneath the search field and the private hit list.

> **NOTICE:**
>
> Alternatively, you can push the enter key.

The contact is searched for in the directory.

If search hits are found, they are displayed beneath the search field.

3) Click on the contact to display his/her data.

> **NOTICE:**
>
> In case groupware connection is used and a private contact is created using the global address list in Exchange, contact details such as phone numbers may not be carried over to UC. As a result, these contact details will not be displayed in OpenScape Web Client's private contact list. Thus, it is advised that the user manually creates the private contact in Outlook.

4) Select **Add to contacts**.
5) If you wish to assign the contact to a group from your private contacts, select the group's name under **Groups**.

You can assign the contact to several groups.

The group name is highlighted in color.

You have copied a contact from the directory to your private contacts.

Next steps

In order to display the private contact list again, select **Back** and then × in the search field.

3.11 How to Create a new Private Contact

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

Prerequisites

The contact area is displayed.

Step by Step

1) Click on in the contact area.

The display changes for adding a contact.

2) Specify the contact information.

> **NOTICE:**
>
> The last name and at least one phone number are mandatory.

3) If you wish to store an image for the contact, click in the area of the displayed image and select it.

> **NOTICE:**
>
> The image size must not exceed 16 kB and the image must be available in one of the following formats: *.jpeg, *.png

4) If you wish to assign the new contact to a contact group, select the group's name under **Groups**.

   You can assign the contact to several groups.

   The group name is highlighted in color.

5) Select **Save** to copy the new contact.

You have created a new private contact.

3.12 How to Call a Private Contact

You can call a private contact in the contact area by mouse click.

Prerequisites

The contact data include at least one phone number.

The contact area is displayed.

Step by Step

1) Move the mouse pointer onto the contact in the contact list.

   You see additional controls.

2) Select if you wish to call the contact under his/her main phone number.

   If only a single number is given for a contact, it is automatically his/her main phone number. If several phone numbers have been specified for a contact, the number under **Work** is the main phone number.

   A signaling bar displays the connection setup.

   Your preferred device rings.

3) How to select the phone number for calling the contact:

a) Select .

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

b) Select a phone number for calling the contact.

A signaling bar displays the connection setup.

Your preferred device rings.

4) How to accept a call:

NOTICE:

If the **Auto-Answer** feature is enabled for your preferred device, speaker and microphone of the terminal device or a connected headset become active automatically.

- If you wish to use the terminal device's receiver for the call, just pick it up to accept the call.
- If you wish to use speaker and microphone of the terminal device or a connected headset to accept the call, select in the signaling bar.

  Speaker and microphone of the terminal device or of a connected headset become active.

The connection is being established.

A call control bar opens, displaying the new connection.

You have called a private contact.

3.13 How to Add a new Device

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

Step by Step

1) Click on your login name in the header bar and select **Settings**.

The settings menu opens.

2) Switch to the **Devices** section.

NOTICE:

Alternatively, you can access the **Devices** section by clicking in the header bar and then select **Device settings.**

---

3) Select **Add a new device** under **Your phones**.

The display changes for adding a device.

4) Enter a name for the new device under **Device name**.

Under this name the device will later be displayed in the device list.

5) Enter the device's phone number under **Phone number**.

On entering the number, use the following format:

+<country code ><area code ><extension >

Example of Germany: +49240409010

6) Determine under **Ring and redirection preferences** how a call shall be redirected from the device if you do not accept the call on this device.

- **Let my phone ring for [] seconds**

  If you do not accept an icoming call on this device within this period, the call will be forwarded to your voicebox.
- **Time out the redirected call after the standard amount of time (1 minute) has passed**

  If you do not accept an icoming call on this device within one minute, the call will be forwarded to your voicebox.
- **Do not provide a timeout for redirecting calls**

  Incoming calls are never forwarded.

7) Select **Add device**.

The new device is displayed in the device list under **Your phones**.

8) Select **Save**.

You have added a new device to the list of your devices.

3.14 How to Display your Voicemails

You can display your voicemails list in the content area.

Step by Step

Select  in the navigation bar.

Your voicemails list is displayed in the content area.

If there are new voicemails you have not viewed yet, the number of these voicemails is displayed in a green square within the voicemail tab.

3.15 How to Log Off

Before you close the browser window with the client, you should log off duely.

Step by Step

1) Click on your login name in the header bar.

The settings menu opens.

2) Select **Sign out**.

You are logged off and the logon page is displayed.

4 Using the Client Features

The description of the client's features is divided in the following sections:

- Structure of the User Interface
- General Use of the Client
- Notifications
- General Call Control
- Contacts and External Directory
- Call History
- One-Number Service (ONS)
- Presence
- Conferences
- Voicemails
- Team Feature
- Instant Messaging
- Web Collaboration

4.1 Structure of the User Interface

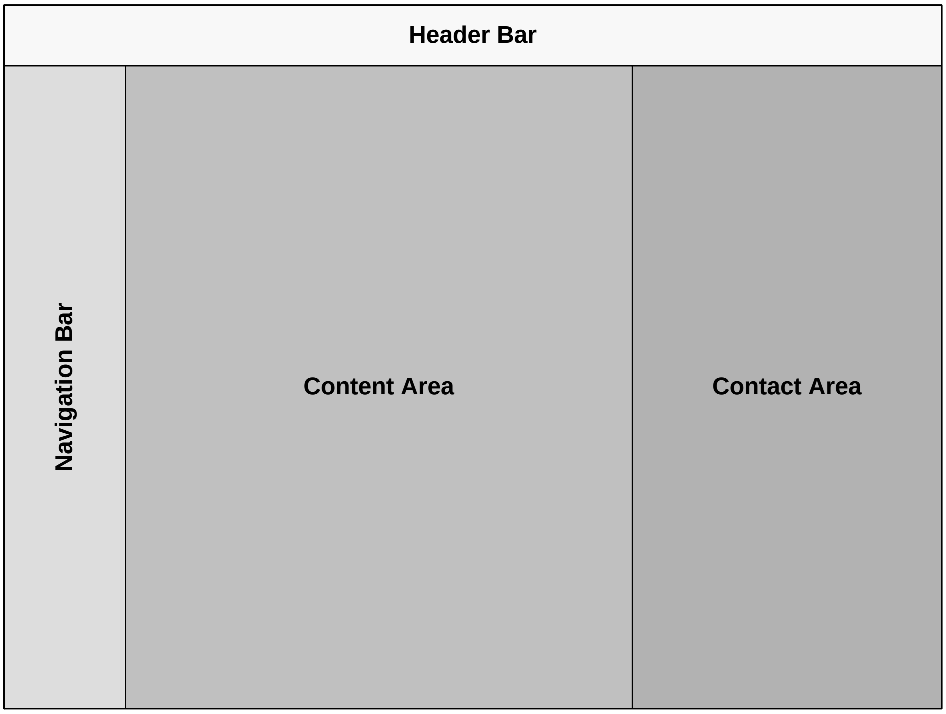
The user interface is divided in various sections. They may not always be visible as a whole.

The different sections of the user interface are:

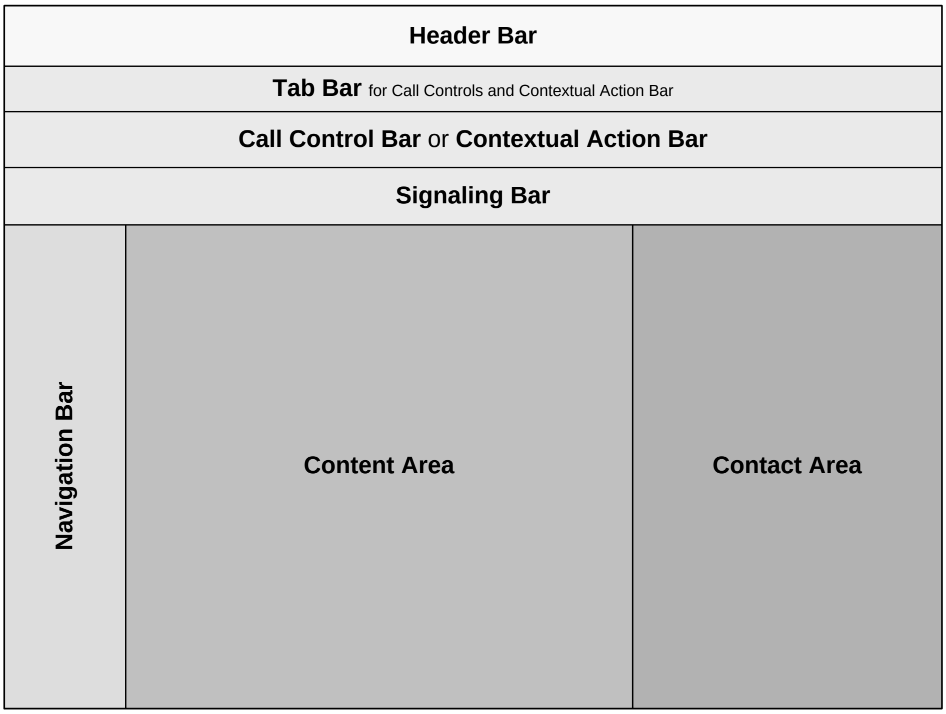
- Header bar
- Tab bar
- Call control bar
- Contextual action bar
- Signaling bar
- Navigation bar
- Content area
- Contact area

The various sections of the user interface may be arranged as follows:

Without optional areas:

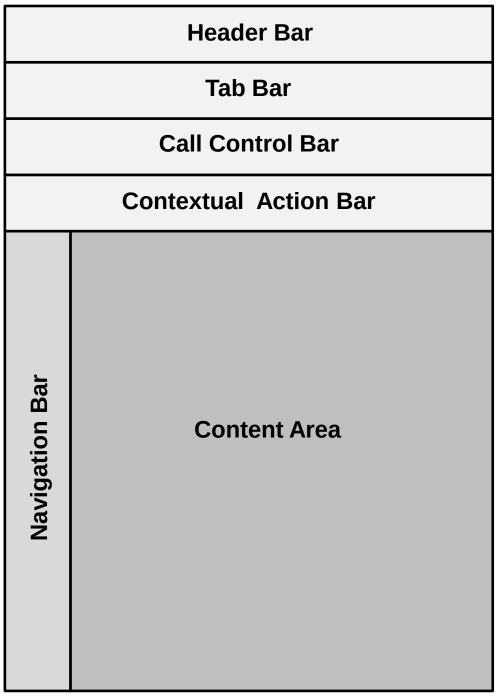


With all possible optional areas:



Mini view

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.



4.1.1 Header Bar

Using the header bar you configure the most important OpenScape UCApplication and client settings.

Such settings are in particular:

- Your preferred device
- Your presence status
- Your login password

Furthermore, you see with which login name you are logged in.

NOTICE:

If there are pending presence status requests, the number of such requests is indicated in a green square next to your login name.

4.1.2 Tab Bar

If call control bars must be displayed for several active calls in the user interface, they appear as tabs in the tab bar. The position of the actual call control is then always occupied by the one the tab of which you select in the tab bar.

The tab display is also used when the contextual action bar must be shown in addition to the call control of an active call.

Using the controls on the call control tabs, you can quickly place the associated calls on-hold or reconnect to a held call.

4.1.3 Call Control Bar

In the call control bar you control functions for an active call.

The user interface may represent one call control bar at the most.

If additional call control bars have to be displayed in the user interface, all call control bars appear as tabs in the tab bar. The position of the actual call control is then always occupied by the one the tab of which you select in the tab bar.

The tab display is also used when the contextual action bar must be shown in addition to the call control bar.

4.1.4 Contextual Action Bar

The contextual action bar serves as dynamic clipboard for contacts when performing group actions– for example initiating a conference with several contacts. In this case you can copy the desired contacts to the contextual action bar and then initiate a conference with these contacts.

If call control bars must be displayed in addition to the contextual action bar in the user interface, contextual action bar and call control bars appear as tabs in the tab bar. You can then toggle the call control bars and the contextual action bar using those tabs.

Furthermore, specific dialogs may display a local contextual action bar. Its function is restricted to the respective dialog.

4.1.4.1 How to Add Contacts to a Contextual Action Bar

You can assemble contacts in the contextual action bar to perform a group action – for example initiating a conference – with them at a later date. Those contacts may be taken from various sources.

Prerequisites

The source from which you wish to copy a contact – for example the contact area or your call history – is displayed.

Step by Step

1) Move the mouse pointer onto the entry from which you wish to copy a contact.

Such an entry can be:

- – A single contact in your private contact list
- – A complete contact group in your private contact list
- – A single contact from the directory
- – An entry in your call history
- – A presence status query
- – A participant entry in a stored conference
- – An entry in your voicemail list

You see additional controls.

2) Select .

If the contextual action bar is already open, the contact is added to it directly. The contextual action bar will otherwise be opened beforehand.

4.1.4.2 How to Remove a Contact from a Contextual Action Bar

You can remove a contact from the contextual action bar– for example when you have added the wrong contact to the action bar.

Prerequisites

The contextual action bar is displayed.

Step by Step

1) Move the mouse pointer onto the desired contact in the contextual action bar.

You see the additional control.

2) Select.

You have deleted the contact from the contextual action bar.

4.1.4.3 How to Dismiss the Content of a Contextual Action Bar

You can dismiss the content of the contextual action bar, thus cancelling the planned action. For example, after assembling the participants for a conference in the contextual action bar, you can dismiss the action bar and the conference is not initiated.

Prerequisites

The contextual action bar is displayed.

Step by Step

Select in the top right corner of the contextual action bar.

The contextual action bar closes and its content is dismissed.

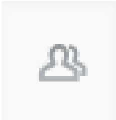
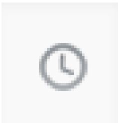
4.1.5 Signaling Bar

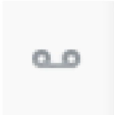
In the signaling bar you control the setup of a phone connection. As soon as the phone connection has been established, the signaling bar is closed and replaced with a call control bar.

4.1.6 Navigation Bar and Content Area

Using the navigation bar you can determine the information to be displayed to you in the content area.

The navigation bar has tabs for the following topics:

Icon	Topic	Content
	Contacts **NOTICE:** Only when the browser is diplayed in the mini view	All contacts: All contacts details Groups or teams **NOTICE:** When a contact is clicked, the calls exchanged and the contact details are displayed
	Call History	Name: the contact’s name All calls: missed, outgoing, incoming Date: the call date **NOTICE:** The Name and All calls columns are merged in the mini view

Icon	Topic	Content
	Voicemails **NOTICE:** Only displayed if the administrator has configured the Voicemail feature for you in OpenScape UCApplication	Name: the contact’s name Date: the voicemail date
	Conferences	Date: the conference date Title: the conference title Creator: the conference creator **NOTICE:** The creator and date columns ar merged in the mini view
	Chat History	Name: Chat-partner Date: Date of the chat

If a topic contains new elements you have not viewed yet, the number of these elements is displayed in a green square within the relevant tab.

4.1.7 Contact Area

In the contact area you manage your private contacts, as well as your contact groups and teams.

You can minimize the contact groups, the teams or all contacts area to save space in the contact area.

The contact area is displayed on the right pane of the screen with the browser window to the maximum height and width. When the browser window is restored down, the OpenScape Web Client appears in the mini view. The contact area icon is moved to the left pane of the screen in the navigation bar and the contact details are displayed in the content area.

NOTICE:

WebClient set the user’s timezone on startup/login to the timezone set on the OS level. Thus the timezone in WebClient matches to the timezone the user has set for other software (e.g. Outlook).

4.1.7.1 How to Minimize Contact Groups or Teams in the Contact Area

You can minimize contact groups or teams in the contact area to save space for other contact groups or teams.

Prerequisites

The contact area is displayed on the right pane.

Step by Step

Click on the upwards arrow ^ at the bottom center of the contact group or team that you need to minimize.

The contact group or team is minimized.

4.1.7.2 How to Display a Contact Group or Team in the Contact Area

You can display a contact group or team in the contact area, in order to edit your private contacts details, or your contact groups or teams.

Prerequisites

The contact group or team is displayed minimized in the contact area.

Step by Step

Click on the downwards arrow ⌄ at the bottom center of the contact group or team that you need to expand.

The contact group or team is expanded in the contact area.

4.1.8 Audio and Video Settings

When using WebRTC as the preferred device, you can perform Audio and Video calls using your browser.

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**.

4.1.8.1 Using Video effects

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

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.

4.2 General Use of the Client

This section describes various features concerning the client's general use.

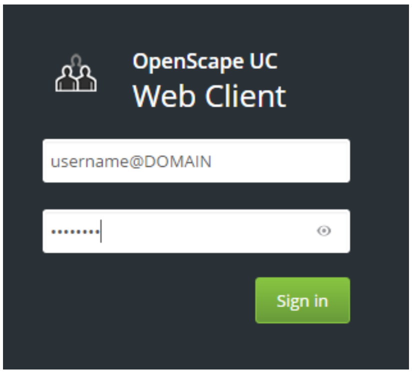
4.2.1 How to Log On

Before the user interface is displayed, you must log on.

Step by Step

1) Open your browser and invoke therein the address you received from your administrator.

The login dialog is displayed.



2) Enter your user name for logging to the OpenScape UC Application in the user name field.

Windows authentication:

If the Windows authentication is active in your system, you can use your Windows login data for logging to the OpenScape UC Application. In this case you need to enter your Windows user ID in the username field of the OpenScapeWeb Client login dialog in the following format:

<Windows domain name>\<Windows user name> or

<Windows user name>@<Windows domain name>

You need to enter the associated Windows user password in the password field.

NOTICE:

In case windows login is used in OpenScape Web Client, the username must not include any spaces.

IMPORTANT:

The domain must be specified with capital letters.

E.g. MY_WEB.COM

If you do not know your user name, consult your administrator for further support.

3) Enter your password in the **Password** field.

If you do not know your password, consult your administrator for further support.

NOTICE:

Using in the **Password** field you can display the entered password in the clear text.

IMPORTANT:

Use only if no other person can see your entered password.

4) Select **Sign in**.

NOTICE:

Single Sign-On: If the Single Sign-On (SSO) feature has been configured for your Windows user account, the login dialog is not displayed. Single Sign-On enables you to use the features of the OpenScape UC Application via the OpenScape Web Client after logging in at your workstation without having to additionally authenticate against the OpenScape UC Application system

You are signed in the OpenScape Web Client. You will be prompted to take a quick tour. You can select to skip the quick tour, or select to proceed and view a summary of the OpenScape Web Client capabilities. The quick tour is disabled if your browser is restored down and the OpenScape Web Client displayed in the mini view.

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.

4.2.2 How to Log Off

Before you close the browser window with the client, you should log off duely.

Step by Step

1) Click on your login name in the header bar.

The settings menu opens.

2) Select **Sign out**.

You are logged off and the logon page is displayed.

4.2.3 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 in the header bar and select **Profile** > **Change password**.

2) Enter the new password and click **Save**.

4.2.3.1 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.

4.2.3.2 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 18.

4.2.4 How to Invoke the Online Help

Operation-related questions are answered by the product documentation. You can invoke this documentation from the user interface.

Step by Step

1) Click on your login name in the header bar.

   The settings menu opens.

2) Select **Settings**.
3) Select the **View online help** link under **Online help**.

The product documentation is displayed.

4.2.5 How to Determine the Software Version Used

You can determine which version of the client software you use. This information can be important, for example when requesting technical support.

Step by Step

1) Click on your login name in the header bar.

   The settings menu opens.

2) Select **Settings**.
3) The version of the client software currently used is displayed under **Software version information**.

You have determined the software version used.

4.2.6 How to Download OpenScape Desktop Integration

Using the client you can download the executable file of OpenScape Desktop Integration.

Step by Step

1) Click on your login name in the header bar.

The settings menu opens.

2) Select **Settings**.

3) Select the **Download the DI-Tool** link under **Desktop Integration Tool**.

Your browser offers downloading the executable file.

4) Download the executable file.

You have downloaded the executable file of OpenScape Desktop Integration.

Next steps

Install OpenScape Desktop Integration as described in the *OpenScape UCApplication, Installation and Upgrade* manual.

4.3 Notifications

You can be notified about various communications events automatically.

The following table shows the events and how to be notified in the respective case.

Event	Notification type
Missed call	E-mail
Incoming call	Show Notification
Incoming call pickup	Show Notification
Incoming instant message	Show Notification
Incoming Tell-me-when	Show Notification
Incoming Web Collaboration	Show Notification
Incoming Voice Call	Show Notification

NOTICE:

This notifications feature can be enabled in any internet browser that supports Push notification functionality (e.g Chrome, Firefox).

In a Chrome browser, navigate to **Settings** > **Privacy and security** > **Site Settings** > **Notifications** in order to enable notifications from the webclient url.

In a Firefox browser, navigate to **Options** > **Privacy and security** > **Permissions** > **Notifications** > **Settings** in order to enable notifications from the webclient url.

4.3.1 How to be Notified about a Missed Call

You can have an e-mail notify you about a missed call.

Step by Step

1) Click on your login name in the header bar.

The settings menu opens.

2) Select **Settings**.

3) Switch to the **Notifications** section.

4) Activate the **E-mail me every time I miss a call** option.

5) Select **Save**.

From now on you receive a notification e-mail each time you miss a call.

NOTICE:

The notification e-mail includes a link, which you can click and dial directly the number of the callee if you are already logged in the OpenScape Web Client. If you are not logged in, you will be redirected to the OpenScape Web Client login page. Once you access the OpenScape Web Client, the system will dial directly the callee.

4.3.2 How to have a new Call Signaled

You can have a newly arriving call signaled by a notification.

Step by Step

1) Click on your login name in the header bar.

The settings menu opens.

2) Select **Settings**.

3) Switch to the **Notifications** section.

4) Activate the **Show notification incoming call** option.

5) Select **Save**.

From now on, a signal tone will alert you to newly incoming calls.

4.3.3 How to have a new Call Pickup Signaled

You can have a newly arriving Call Pickup call signaled by a notification.

Step by Step

1) Click on your login name in the header bar.

The settings menu opens.

2) Select **Settings**.

3) Switch to the **Notifications** section.

4) Activate the **Show notification for call pickup** option.

5) Select **Save**.

From now on, a signal tone will alert you to a call coming in for a member of your team.

4.3.4 How to have a new Instant Message Signaled

You can have each newly arriving instant message signaled by a notification.

Step by Step

1) Click on your login name in the header bar.

The settings menu opens.

2) Select **Settings**.

3) Switch to the **Notifications** section.

4) Activate the **Show notification on incoming instant message** option.

5) Select **Save**.

From now on a signal tone informs you about the arrival of a new instant message.

4.3.5 How to Set Tell-me-When Notifications

It may be hard to reach a specific contact. In this case you can activate the Tell-Me-When feature of OpenScape UC Application to notify you as soon as the respective contact is available again. For example, if you want to call a contact but his/her presence status is unavailable, you can use the Tell-Me-When feature to be notified when the contact is available again. Tell-me-When notifications can either be a return call, which is automatically triggered, a toast notification or a notification displayed on the top of the Web Client. Tell-me-When notifications can inform you when the contact's line is free, or when the contact's status is **Available.**

Step by Step

1) Move your mouse pointer over the desired contact in the contact area or in the entries of the call history.
You can see additional controls.

2) Click on the communication options icon.

   The Tell-me-When options appear provided that the contact’s line is busy or the contact is not available.

3) Select one of the following Tell-me-When options:
   a) **Call when line is free**
   b) **Notify when line is free**
   c) **Notify when available**

4) Set a time duration for the selected Tell-me-When notification in hours in the available field. You can click **Remove** to cancel the Tell-me-When notification if needed.

The Tell-me-When notification appears on the top of the Web Client including the name of the contact and the contact's status.

A toast notification will appear on the bottom right side of your desktop when the contact is available. You can move your mouse over the toast notification next to the contact's status and select the corresponding communication option, e.g. chat, call, E-Mail.

4.3.5.1 How to Configure the Default Duration of Tell-me-When Notifications

You can configure the default duration for a Tell-me-When notification event. The default duration is 4 hours, while the maximum duration is 12 hours.

Step by Step

1) Click on your login name in the header bar.

   The settings menu opens.

2) Select **Settings**.
3) Switch to the **Notifications** section.
4) Enter the default duration in hours in the available field. You can click **Reset** at any time to reset the default duration.
5) Click **Save**.

The default duration for a Tell-me-When notification has been set.

4.3.6 How to have a new Web Collaboration Signaled

You can have a newly arriving Web Collaboration signaled by a notification.

Step by Step

1) Click on your login name in the header bar.

   The settings menu opens.

2) Select **Settings**.
3) Switch to the **Notifications** section.
4) Activate the **Show notification for incoming Web Collaboration** option.
5) Select **Save**.

From now on, a signal tone will alert you to a call coming in for a member of your team.

4.3.7 How to have a new Voicemail Signaled

You can have a newly arriving Voicemail signaled by a notification.

Step by Step

1) Click on your login name in the header bar.

The settings menu opens.

2) Select **Settings**.

3) Switch to the **Notifications** section.

4) Activate the **Show notification for incoming voicemail** option.

5) Select **Save**.

From now on, a signal tone will alert you to a call coming in for a member of your team.

4.4 General Call Control

Using the client you can initiate and control general call features on your preferred device.

General call features comprise in particular:

- Initiating a call
- Accepting / rejecting calls
- Forwarding calls
- Initiating consultation calls
- Placing a call on-hold
- Toggling simultaneous calls
- Transferring calls

4.4.1 How to Accept a Call

An incoming call is indicated with a signaling bar. Using the controls provided by this signaling bar you can react to the call.

Step by Step

How to accept a call:

NOTICE:

If the **Auto-Answer** feature is enabled for your preferred device, speaker and microphone of the terminal device or a connected headset become active automatically.

- If you wish to use the terminal device's receiver for the call, just pick it up to accept the call.
- If you wish to use speaker and microphone of the terminal device or a connected headset to accept the call, select in the signaling bar.

  Speaker and microphone of the terminal device or of a connected headset become active.

The connection is being established.

A call control bar opens, displaying the new connection.

NOTICE:

If you accept a call while being connected to another subscriber, the active call is placed on-hold.

4.4.2 How to Reject a Call

An incoming call is indicated with a signaling bar. Using the controls provided by this signaling bar you can react to the call.

Step by Step

Select in the signaling bar of the incoming call.

The signaling bar closes.

You have rejected the incoming call.

4.4.3 How to Call a Phone Number

You can call a subscriber who is found neither among your private contacts nor in the directory. Simply dial his/her phone number.

Prerequisites

The contact area is displayed.

Step by Step

1) Enter the subscriber's phone number in the search field of the contact area.

NOTICE:

After typing the first or a combination of digits of the contact’s telephone number in the search field, the system will display a matching contact or a list of contacts from the existing directory, to facilitate your search.

2) Select next to the search field.

NOTICE:

You can also press `SHIFT + ENTER`.

A signaling bar displays the connection setup.

Your preferred device rings.

3) How to accept a call:

NOTICE:

If the **Auto-Answer** feature is enabled for your preferred device, speaker and microphone of the terminal device or a connected headset become active automatically.

- If you wish to use the terminal device's receiver for the call, just pick it up to accept the call.
- If you wish to use speaker and microphone of the terminal device or a connected headset to accept the call, select in the signaling bar.

  Speaker and microphone of the terminal device or of a connected headset become active.

The connection is being established.

A call control bar opens, displaying the new connection.

4.4.4 How to Terminate an Active Call

An active call is displayed by a call control bar. Using the controls of this call control bar you can close the phone connection.

Prerequisites

You are conducting a phone call.

Step by Step

How to terminate the call:

- If you use the terminal device's receiver for the call, simply put it down.
- If you use speaker and microphone of the terminal device or a connected headset for the call, select in the call control bar of the active call.

  Speaker and microphone of the terminal device or of a connected headset are switched off.

The call control bar closes.

You have terminated the call.

4.4.5 How to Hand an Active Call over to Another Device

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

Prerequisites

You are conducting a phone call.

Step by Step

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

   You see a menu with connecting options.

2) Select under **Switch to a different device** the device for resuming the call.

   The active call is being handed over.

   The device rings.

3) Accept the call on the device.

You have changed the device.

NOTICE:

Please do not handover calls to the WebRTC softphone of other UC users as this will affect call control functionality.

4.4.6 How to Place an Active Call On-Hold

An active call is displayed by a call control bar. Using the controls of this call control bar you can place the active call on-hold. In this process, the connection between you and your conversational partner is interrupted until you reconnect to him/her.

Prerequisites

You are conducting a phone call.

Step by Step

Select  in the call control bar of the phone connection.

The connection between you and your conversational partner is interrupted for the time being.

The call control bar of the phone connection appears grayed out.

You have placed the active call on-hold.

4.4.7 How to Reconnect to a Held Call

A held call is displayed with a grayed-out call control bar. Using the controls of this call control bar you can reconnect to the held call.

Prerequisites

You are conducting a phone call that is being held.

Step by Step

Select in the grayed-out call control bar of the phone connection.

You are reconnected to your conversational partner.

You have reconnected to the held call.

4.4.8 How to Alternate between Calls

Not matter how many phone connections you are running at the same time: You can always only conduct one call. All other phone connections are automatically placed 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.

Prerequisites

You have set up several simultaneous phone connections.

Step by Step

How to use the controls in the tabs of the tab bar:

- In order to connect to a held call, select in the associated tab of the tab bar.

  You are connected to the phone connection and the held call becomes active. If another of the phone connections had been active until then, it is automatically placed on-hold.

- In order to place a currently active call on-hold, select in the associated tab of the tab bar.

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

> **NOTICE:**
>
> It is not supported to Alternate/Reconnect between incoming calls established on a preferred device being an External OND e.g. a mobile phone.
>
> Alternating between these calls can only be administered via the external OND.

4.4.9 How to Make a Consultation Call

While talking to a conversational partner you can be connected to a second conversational partner in parallel. The first call is then automatically placed on-hold. After finishing the second call you are automatically reconnected to the first conversation partner.

Prerequisites

You are conducting a phone call.

Step by Step

1) Establish a second phone connection in any way.

The original call is automatically placed on-hold. The call control bar of the held call appears grayed out.

A signaling bar displays the second connection setup.

Your preferred device rings.

2) Select in the signaling bar to accept the second call.

A call control bar opens, displaying the new phone connection. The tab bar opens and the call control bars of both calls are represented therein as tab.

3) Select in the call control bar of the second phone connection to terminate the second call.

You are automatically reconnected to the first conversational partner.

4.4.10 How to Transfer a Call to Another Subscriber

An active call is displayed by a call control bar. Using the controls of this call control bar you can transfer the call to another subscriber.

Prerequisites

You are conducting a phone call.

Step by Step

Select the button in the call control bar.

a) A field to select to whom you want to transfer the call is displayed. You can look for a contact or type the number you want to transfer the call to.

If the name or number you have typed is in your private contact list, the contact immediately appears in the list.

b) You can click on to look for more contacts in the OpenScape UC or other integrated directories.

c) The call is transferred by pressing the button that appears when you select the contact.

In case you typed a phone number that is not associated to any contact, click on the **+** button to transfer the call.

You have transferred the call.

4.4.11 How to Transfer a Consultation Call

Prerequisites

You are in a consultation call.

Step by Step

Click on the button in the call control bar.

Two menu options will appear to you:

- Transfer to waiting call:

  When you select this option, you will be disconnected and the contact you are in consultation will be connected in a call to the contact on hold.
- Transfer to another person:

  When you select this option, you will be prompted with a search or dial field to call to another contact. Select the contact and press to transfer the person you are in consultation to the new contact you have selected.

  You will be disconnected from the consultation call and can retrieve the call on hold.

4.4.12 How Hand a Call over after Consulting another Subscriber

Before you hand a call over to another subscriber, you can initiate a consultation call to announce the handover orally.

Prerequisites

You are conducting a phone call.

Step by Step

1) Establish a second phone connection to the subscriber you wish to hand the call over to in any way.

The original call is automatically placed on-hold. The call control bar of the held call appears grayed out.

A signaling bar displays the second connection setup.

After the second conversational partner has accepted the call, a call control bar that displays the new connection opens. The tab bar opens and the call control bars of both calls are represented therein as tab.

2) Select in the call control bar of the second phone connection.

You see a menu with connecting options.

3) In order to hand the original call over, select **Transfer to waiting call**.

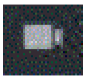
The two conversational partners are connected to each other. Your own connections to the conversational partners are closed.

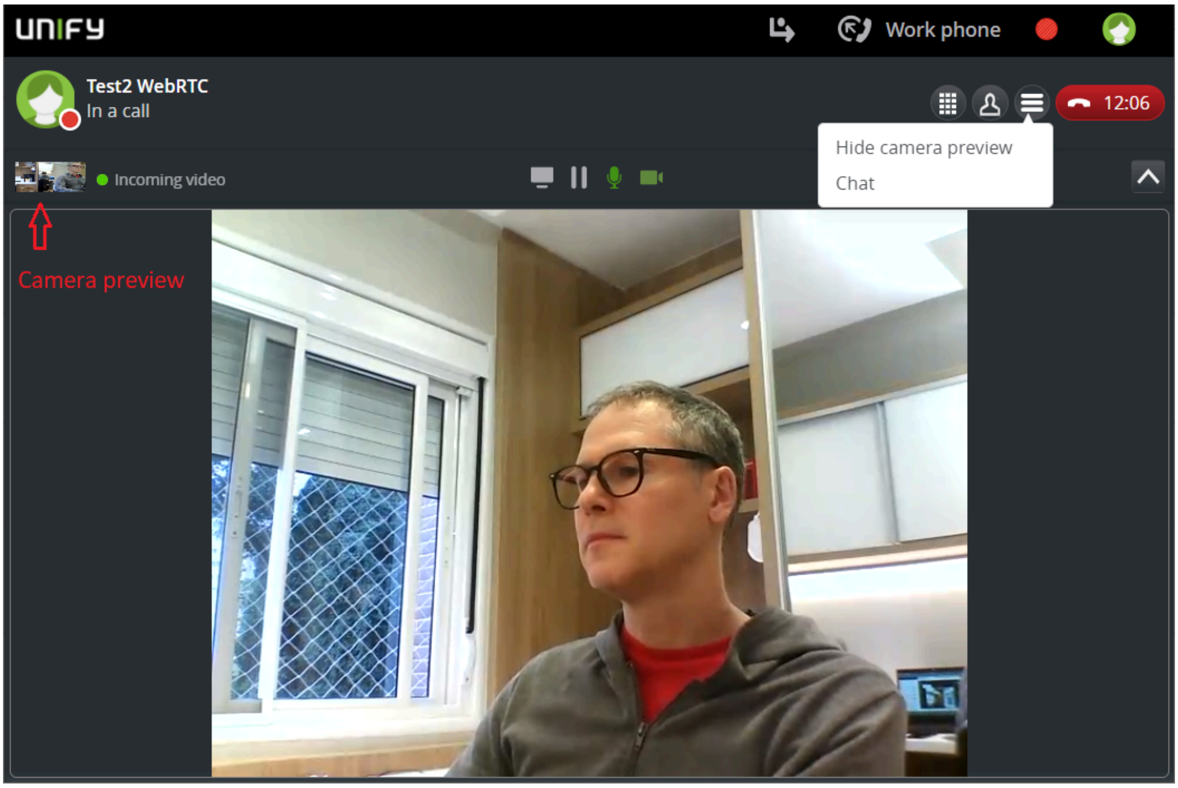
You have transferred the call.

NOTICE:

Please do not handover calls to the WebRTC softphone of other UC users as this will affect call control functionality.

4.4.13 How to Make a Video Call

In case a WebRTC account is being used while conducting a call, you have the option to stream video via your configured camera. To start streaming video in an active call, click on  button.Your video preview and the video from the other party will be displayed in the **Call Control** section as shown in the figure below.



You can also show or hide your video preview selecting the option in the call control menu.

4.4.14 How to Send an E-Mail to a Conversational Partner

An active call is displayed by a call control bar. Using the controls of this call control bar you can send an e-mail to your conversational partner.

Prerequisites

You are conducting a phone call.

You know an e-mail address of the conversational partner– for example as associated entry in your private contacts.

Step by Step

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

You see a menu with media options.

2) Select **E-Mail**.

Your e-mail application opens the window for a new e-mail. In this e-mail you find the recipient's e-mail address already specified.

3) Write and send the e-mail message in your e-mail application as usual.

You have sent an e-mail to the conversational partner.

4.4.15 How to Start a Chat with a Conversational Partner

An active call is displayed by a call control bar. Using the controls of the call control bar you can start a chat with your conversational partner.

Prerequisites

You are conducting a phone call.

You know an Instant-Messaging address of the conversational partner– for example as associated entry in your private contacts.

Step by Step

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

You see a menu with media options.

2) Select **Chat**.

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

4.4.16 How to Initiate a Web Collaboration Session with a Conversational Partner

An active call is displayed by a call control bar. Using the controls of the call control bar you can initiate a Web Collaboration session with your conversational partner.

Step by Step

1) Click on in the signaling bar. D

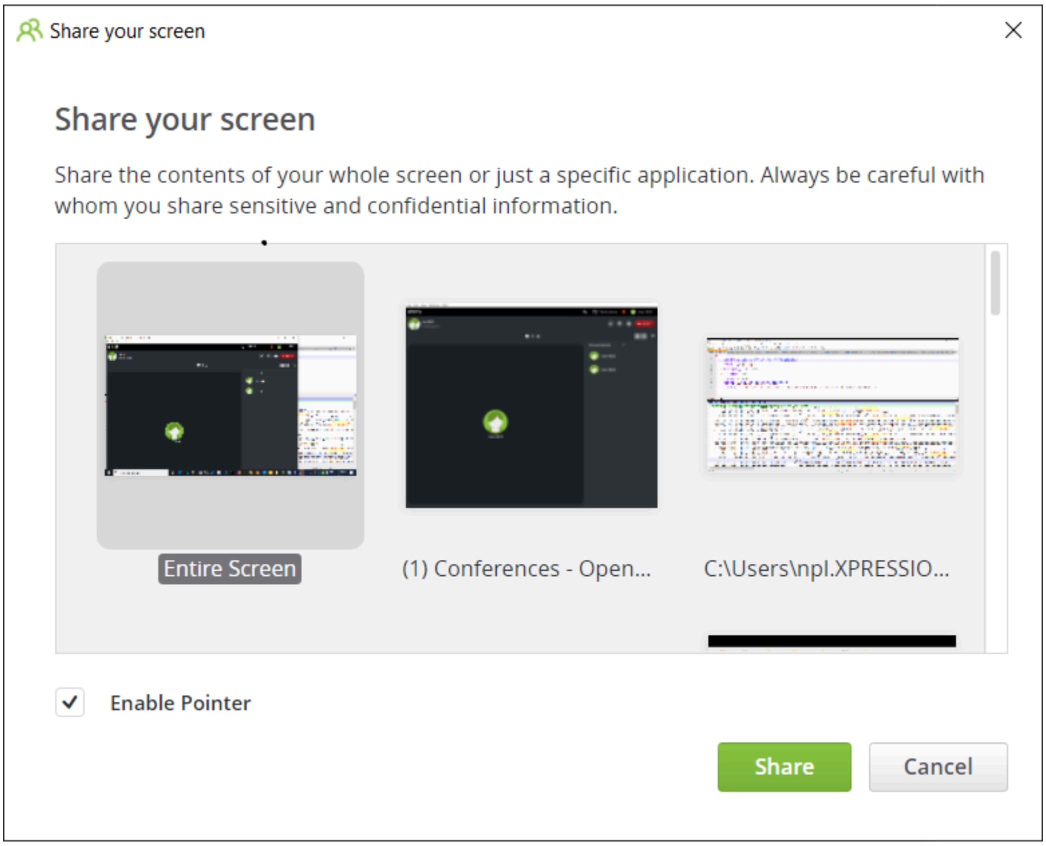
Depending on how your system is deployed, the functionality can be one of the two modes below:

- Fastviewer Web Collaboration deployment mode:

  The fastviewer client file will start downloading from your web browser. Open this file once finished downloading to start the web collaboration.

  In case you are talking to a person not using a UC Client, you can send an e-mail invitation with a link to download the fastviewer client or to access it via web.
- WebRTC Screen Sharing deployment mode:

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



2) The other call party will see your screen sharing in the designated Call Control section.

In case you are talking to a person that is not using a UC Client, you can send an e-mail invitation with a link to join the screen sharing session via web. For more information refer to section How to Enable WebRTC Screen Sharing in a call with an external contact.

When using the WebRTC Screen Sharing deployment mode you can also have access to the Mouse Pointer and Remote Desktop Control functionalities, as described in the Conferences section.

NOTICE:

How to control the Web Collaboration session is described in the *OpenScape Web Collaboration, User Guide*.

4.5 Contacts and External Directory

In various locations of the user interface you see contacts. Such contacts are either your private contacts or contacts from the connected directory.

Your private contacts are stored on the OpenScape UCApplication server. They can only be accessed by yourself. The contacts of the connected directory are either stored in the internal OpenScape UCApplication contact directory or in an external directory connected to OpenScape UCApplication– for example an external LDAP directory.

Using contacts you can determine contact information or initiate various types of communication relationships– for example make calls, send instant messages or start a conference.

You can manage your private contacts in the contact area of the user interface and organize them in contact groups.

When displaying the details of one of your contacts you also see the last calls and voicemails of this user. You can use the information related to such calls to call a contact directly in a simple manner.

You can copy contacts from the directory to your private contacts, thus organizing them in contact groups also. However, you cannot change the associated contact information. Automatic synchronization is performed by the standard synchronization mechanism, at least once per day and according to the configuration set by the administrator. The following configuration options are available:

- Contact data fields are not editable.
- All fields will be overwritten with directory data during synchronization.
- All fields will be synchronized and user modified data will be kept in case of empty directory fields.
- Only empty user modified fields will be synchronized and fields that were cleared by the user will be overwritten with directory data during synchronization.

If required, you can also manually synchronize copied contacts with the original directory contact.

Finding Contacts

Using the contact search you can look for the following elements:

- Private contacts
- Contacts in the external directory

Search items for finding private contacts are:

- Full last name or part of a last name
- Full first name or part of a first name
- Full phone number or part of a phone number
- Full company name or part of the company name (advanced search)
- Full department name or part of the department name (advanced search)
- Full city (location) or part of the city (location)
- Full building or part of the building name
- Full room number or part of the room number

NOTICE:

The fields City, Building and Room are displayed in the advanced search only if they have been configured by the OpenScape Unified Communications administrator.

You can also find second and first names in the external directory. If looking in there, the following search text rules apply:

- For finding a first or last name, you should specify at least one letter or a combination of letters of the contact’s first or last name. All contacts whose first or last names include the letter or the combination of letters entered in the search field will be displayed.
- For finding a phone number you always have to specify at least one digit or a combination of digits of the phone number. All phone numbers including this digit or the combination of digits entered in the search field will be displayed.

NOTICE:

If a last name contains only digits it cannot be found, since the digits are interpreted as a phone number

- dialing on the search windows finds results from private contact list
- dialing on the search window and clicking enter finds results also from global contact list
- dialing on the search button and using search button underneath search also from LDAP directory
- Advanced search option is used to search contacts on all directories with more criteria

4.5.1 How to Display a Contact's Details

In various locations of the user interface you see contacts whose details you can display. Such contacts are either private contacts or contacts from the directory. As a rule, you recognize a contact on the user interface by the following presence status icons of which one may precede the contact's name:,,,,. The represented presence status icon indicates the user presence status a user has set for himself/herself.

Step by Step

1) Move the mouse pointer onto the contact name.

A contact name may appear in the following user interface locations:

- – In the contact area
- – In the call control bar
- – In the entries of the call history
- – In conference details

2) Select the contact name.

The contact area displays the contact details.

4.5.2 How to Create a new Private Contact

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

Prerequisites

The contact area is displayed.

Step by Step

1) Click on in the contact area.

The display changes for adding a contact.

2) Specify the contact information.

> **NOTICE:**
>
> The last name and at least one phone number are mandatory.

3) If you wish to store an image for the contact, click in the area of the displayed image and select it.

> **NOTICE:**
>
> The image size must not exceed 16 kB and the image must be available in one of the following formats: *.jpeg, *.png

4) If you wish to assign the new contact to a contact group, select the group's name under **Groups**.

You can assign the contact to several groups.

The group name is highlighted in color.

5) Select **Save** to copy the new contact.

You have created a new private contact.

4.5.3 How to Change the Data of a Contact

You can change the data of private contacts or contacts from directories in the contact area.

Prerequisites

The contact area is displayed.

Step by Step

1) Click on the group selection field in the contact area.

The group menu opens.

2) Select **All Contacts** or a group that contains the contact.

The group name is displayed in the group selection field; the list thereunder displays the group first, then all associated contacts.

3) Select the contact's name.

You see all contact information.

4) Click on the contact name and select ✎.

The display switches to the edit mode.

5) Change the desired contact data, such as:

- First name
- Last name
- Company
- Department
- City (Location)
- Building
- Room
- Note (a text field to add a note about the contact)
-

NOTICE:

The fields City, Building, Room and the free text field Note are displayed only if they have been configured by the OpenScape Unified Communications administrator.

- Work phone number
- Mobile phone number
- Home phone number
- Video
- Work E-mail
- Chat
- Groups (Add to group or remove from group)
- Teams (Add to team or remove from team)

NOTICE:

In case the contact is copied from a directory, the contact data may be changed in case of synchronization.

According to the configuration set by the administrator, one of the following options will be available:

- Contact data fields are not editable.

- All fields will be overwritten with directory data during synchronization.

- All fields will be synchronized and user modified data will be kept in case of empty directory fields.

- Only empty user modified fields will be synchronized and fields that were cleared by the user will be overwritten with directory data during synchronization.

6) How to edit the image for the contact:

a) In order to store another image, click in the area of the displayed image. Then select the new image.

NOTICE:

The image size must not exceed 16 kB and the image must be available in one of the following formats: *.jpeg, *.png

b) If you wish to delete the image without replacement, move the mouse pointer onto the area of the displayed image and select .

7) Select **Save** to apply the changes.

You have changed the contact data.

Next steps

To leave the edit mode, select **Back**.

4.5.4 How to Delete a Private Contact

You can delete private contacts in the contact area.

Prerequisites

The contact area is displayed.

Step by Step

1) Click on the group selection field in the contact area.

   The group menu opens.
2) Select **All Contacts** or a group that contains the contact.

   The group name is displayed in the group selection field; the list thereunder displays the group first, then all associated contacts.
3) Select .

   The display switches to the edit mode.
4) Click **Delete Contact**.

You have deleted a private contact.

NOTICE:

The delete button may be disabled if it is not allowed to delete the contact, e.g. contact is still linked to a user.

Next steps

To leave the edit mode, select **Back**.

4.5.5 How to Find a Private Contact

You may wish to find a private contact for example to view his/her contact data.

Prerequisites

The contact is included in the private contacts.

The contact area is displayed.

Step by Step

1) Enter one of the following search items in the search field of the contact area:
   - Full second name or part of a second name
   - Full first name or part of a first name
   - Full phone number or part of a phone number

   NOTICE:

   After typing the first letters or a combination of letters of the contact’s name, the system will display a matching contact or a list of contacts from the existing directory, to facilitate your search. If your private contacts deliver search hits, they are displayed beneath the search field, continuously updated.

2) In order to display the contact's data, click on the corresponding search hit.

You have found a private contact.

Next steps

In order to delete the shown search result and to display the contact list again, select × in the search field.

4.5.6 How to Find a Private Contact using the Advanced Search

You can use the advanced search to quickly identify the correct contacts. For example, there may be a number of contacts with the same surname. In this case, you can use the advanced search fields to narrow down and facilitate your search.

Prerequisites

The contact is included in the private contacts.

The contact area is displayed.

Step by Step

1) Click **Advanced Search** below the **Search** field.

   The Advanced Search fields are displayed.

2) Enter any of the following search items in the advanced search fields:

- Full first name or part of a first name
- Full last name or part of a last name
- Full company name or part of the company name
- Full department name or part of the department name
- Full phone number or part of the phone number
- Full city (location) or part of the city (location)
- Full building or part of the building name
- Full room number or part of the room number

NOTICE:

The fields City, Building and Room are displayed in the advanced search only if they have been configured by the OpenScape Unified Communications administrator.

3) Click **Search**.

The retrieved contact details are displayed beneath the search field. You can select the corresponding contact if more than one entries are retrieved.

Next steps

In order to delete the shown search result and to display the contact list again, click × in the search field. The contact area is displayed.

4.5.7 How to Call a Private Contact

You can call a private contact in the contact area by mouse click.

Prerequisites

The contact data include at least one phone number.

The contact area is displayed.

Step by Step

1) Move the mouse pointer onto the contact in the contact list.

You see additional controls.

2) Select if you wish to call the contact under his/her main phone number.

If only a single number is given for a contact, it is automatically his/her main phone number. If several phone numbers have been specified for a contact, the number under **Work** is the main phone number.

A signaling bar displays the connection setup.

Your preferred device rings.

3) How to select the phone number for calling the contact:

a) Select .

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

b) Select a phone number for calling the contact.

A signaling bar displays the connection setup.

Your preferred device rings.

4) How to accept a call:

NOTICE:

If the **Auto-Answer** feature is enabled for your preferred device, speaker and microphone of the terminal device or a connected headset become active automatically.

- If you wish to use the terminal device's receiver for the call, just pick it up to accept the call.
- If you wish to use speaker and microphone of the terminal device or a connected headset to accept the call, select in the signaling bar.

  Speaker and microphone of the terminal device or of a connected headset become active.

The connection is being established.

A call control bar opens, displaying the new connection.

You have called a private contact.

4.5.8 How to Initiate an Ad-hoc Conference with Private Contacts

You can initiate an Ad-hoc phone conference by selecting participants from your private contacts.

Prerequisites

The contact area is displayed.

Step by Step

1) How to select all contacts to take part in the phone conference:

a) Click on the group selection field in the contact area.

The group menu opens.

b) Select **All Contacts** or a group that contains the contact.

The group name is displayed in the group selection field; the list thereunder displays the group first, then all associated contacts.

c) Move the mouse pointer onto the contact in the contact list.

You see additional controls.

d) Select .

The contextual action bar opens automatically, showing the first contact. All further contacts are added to the action bar directly.

2) Select in the action bar.

A signaling bar displays the connection setup.

Your preferred device rings.

3) How to accept a call:

NOTICE:

If the **Auto-Answer** feature is enabled for your preferred device, speaker and microphone of the terminal device or a connected headset become active automatically.

- If you wish to use the terminal device's receiver for the conference, just pick it up to accept the call.
- If you wish to use speaker and microphone of the terminal device or a connected headset for the conference, select in the signaling bar.

  Speaker and microphone of the terminal device or of a connected headset become active.

The conference is being set up.

A call control bar opens, displaying the new connection.

You have initiated an Ad-hoc phone conference with several of your private contacts.

4.5.9 How to Initiate a Callback from the Contact Details

When displaying the details of one of your contacts you also see the last calls of this user. You can use those call entries to call back the contact directly in a simple manner.

Step by Step

1) Move the mouse pointer onto the contact name.

A contact name may appear in the following user interface locations:

- – In the contact area
- – In the call control bar
- – In the entries of the call history
- – In conference details

2) Select the contact name.

The contact area displays the contact details.

If there are call list entries for the contact, you see them under **Recent Calls**. Using **Show more** you can display further calls.

3) Click on the call entry the phone number of which you want to use for initiating the callback.

4) How to accept a call:

NOTICE:

If the **Auto-Answer** feature is enabled for your preferred device, speaker and microphone of the terminal device or a connected headset become active automatically.

- If you wish to use the terminal device's receiver for the conference, just pick it up to accept the call.
- If you wish to use speaker and microphone of the terminal device or a connected headset, select in the signaling bar.

  Speaker and microphone of the terminal device or of a connected headset become active.

The connection is being established.

A call control bar opens, displaying the new connection.

You have initiated a callback from the contact details.

4.5.10 How to Send an E-Mail to a Private Contact

You can send an e-mail to a private contact in the contact area by mouse click.

Prerequisites

An e-mail address is included in the contact data.

The contact area is displayed.

Step by Step

1) Move the mouse pointer onto the contact in the contact list.

   You see additional controls.

2) Select .

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

3) Select the entry of the e-mail address.

   Your e-mail application opens the window for a new e-mail. In this e-mail you find the recipient's e-mail address already specified.

   NOTICE:

   It is assumed that additional information is sent to the Conference participants and thus the original Conference body message will not be displayed on the e-mail created.

4) Write and send the e-mail message in your e-mail application as usual.

You have sent an e-mail to a private contact.

4.5.11 How to Send an E-Mail to several Private Contacts

You can send an e-mail simultaneously to several recipients by selecting them from your private contacts.

Prerequisites

The contact area is displayed.

Step by Step

1) How to select all contacts you wish to send an e-mail:

   a) Click on the group selection field in the contact area.

      The group menu opens.

   b) Select **All Contacts** or a group that contains the contact.

      The group name is displayed in the group selection field; the list thereunder displays the group first, then all associated contacts.

   c) Move the mouse pointer onto the contact in the contact list.

      You see additional controls.

   d) Select .

      The contextual action bar opens automatically, showing the first contact. All further contacts are added to the action bar directly.

2) Select in the action bar.

   The action menu opens.

3) Select **E-Mail Group**.

Your e-mail application opens the window for a new e-mail. The recipient field is already furnished with the contacts' e-mail addresses.

> **NOTICE:**
>
> If there is no e-mail address available for participants, a message informs you accordingly.

4) Write and send the e-mail message in your e-mail application as usual.

You have sent an e-mail to several private contacts.

4.5.12 How to Start a Chat with a Private Contact

You can start a chat with a private contact in the contact area.

Prerequisites

The contact data include at least one instant-messaging address.

The contact area is displayed.

Step by Step

1) Move the mouse pointer onto the contact in the contact list.

You see additional controls.

2) Select .

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

3) Select **Chat**.

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

4.5.13 How to Start a Chat with several Private Contacts

You can start a chat with several participants by selecting them from your private contacts.

Prerequisites

The contact area is displayed.

Step by Step

1) How to select all contacts to take part in the chat:

a) Click on the group selection field in the contact area.

The group menu opens.

b) Select **All Contacts** or a group that contains the contact.

The group name is displayed in the group selection field; the list thereunder displays the group first, then all associated contacts.

c) Move the mouse pointer onto the contact in the contact list.

You see additional controls.

d) Select .

The contextual action bar opens automatically, showing the first contact. All further contacts are added to the action bar directly.

2) Select in the action bar.

The action menu opens.

3) Select **Chat with group**.

The chat starts.

NOTICE:

If there is no instant-messaging address available for a participant, a message informs you accordingly.

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

4.5.14 How to Initiate a Web Collaboration Session with a Private Contact

You can initiate a Web Collaboration Session with a private contact in the contact area.

Prerequisites

NOTICE:

This functionality is offered only for systems with WebCollaboration using Fastviewer. Therefore, this functionality is not offered for systems deployed to WebCollaboration using WebRTC.

The contact area is displayed.

Initiating a Web Collaboration session with a person who does not use UC-Application requires a known e-mail address of this user.

Step by Step

1) Move the mouse pointer onto the contact in the contact list.

You see additional controls.

2) Select .

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

3) Select **Start Web Collaboration**.

A signaling bar indicates a freshly started Web Collaboration session.

4) Select in the signaling bar.

The participant module for OpenScape Web Collaboration is being downloaded. The downloaded file is displayed to you in your browser under the downloads.

5) Start the participant module.

The Web Collaboration window opens.

NOTICE:

How to control the Web Collaboration session is described in the *OpenScape Web Collaboration, User Guide*.

NOTICE:

The notification inside the client related to the Web Collaboration is shown only to participants who have smart-client open. (The mail for the Collaboration is sent in any case)

4.5.15 How to Create a new Contact Group

You can create new contact groups in the contact area to group your private contacts.

Prerequisites

The contact area is displayed.

Step by Step

1) Click on the group selection field in the contact area.

The group menu opens.

2) Select **New Group**.

The menu entry changes to an input field.

3) Enter a group name and push the return key.

The new group is displayed in the group menu of the group selection field. The indication **(0)** behind the group name signals that no contacts have yet been assigned to the group.

You have created a new contact rule.

4.5.16 How to Rename a Contact Group

You can rename available contact groups in the contact area.

Prerequisites

The contact area is displayed.

At least one contact group has been created.

NOTICE:

You cannot rename the default group **All Contacts**.

Step by Step

1) Click on the group selection field in the contact area.

The group menu opens.

2) Select the group you wish to rename.

The group name is displayed in the group selection field.

3) Select .

The display switches to the edit mode.

4) Change the displayed group name in the input field.

5) Select **Save** to copy the new group name and to leave the edit mode.

The group is displayed with its new name.

You have renamed the contact group.

4.5.17 How to Assign a Private Contact to an Existing Group

You can assign single private contacts to an existing contact group in the contact area. Each contact can also be assigned to several contact groups.

Prerequisites

The contact area is displayed.

Step by Step

1) Click on the group selection field in the contact area.

The group menu opens.

2) Select **All Contacts** or a group that contains the contact.

The group name is displayed in the group selection field; the list thereunder displays the group first, then all associated contacts.

3) Select the contact's name.

You see all contact information.

4) Select the name of the desired group under **Groups**.

The group name is highlighted in color.

You have assigned the private contact to the contact group.

4.5.18 How to Assign several Private Contacts to an Existing Group

You can assign several private contacts to an existing contact group in the contact area simultaneously. Each private contact can also be assigned to several contact groups.

Prerequisites

The contact area is displayed.

Step by Step

1) How to select all contacts you wish to assign to a group:

a) Click on the group selection field in the contact area.

The group menu opens.

b) Select **All Contacts** or a group that contains the contact.

The group name is displayed in the group selection field; the list thereunder displays the group first, then all associated contacts.

c) Move the mouse pointer onto the contact in the contact list.

You see additional controls.

d) Select .

The contextual action bar opens automatically, showing the first contact. All further contacts are added to the action bar directly.

2) Select in the action bar.

The action menu opens.

3) Select the group under **Add to Group**.

You have assigned several private contacts to a contact group.

4.5.19 How to Assign a Private Contact to a New Group

You can assign single private contacts to a contact group to be freshly created in the contact area. Each contact can also be assigned to several contact groups.

Prerequisites

The contact area is displayed.

Step by Step

1) Click on the group selection field in the contact area.

The group menu opens.

2) Select **All Contacts** or a group that contains the contact.

   The group name is displayed in the group selection field; the list thereunder displays the group first, then all associated contacts.

3) Move the mouse pointer onto the contact in the contact list.

   You see additional controls.

4) Select .

   A contextual action bar opens, displaying the contact.

5) Select in the action bar.

   The action menu opens.

6) Select **New Group**.

   The list entry changes to an input field.

7) Enter a group name and push the return key.

   The new group is created and the selected contact assigned to this group.

You have assigned the private contact to the new contact group.

4.5.20 How to Assign several Private Contacts to a New Group

You can assign several private contacts to a contact group to be freshly created in the contact area simultaneously. Each contact can also be assigned to several contact groups.

Prerequisites

The contact area is displayed.

Step by Step

1) How to select all contacts you wish to assign to a group:
   a) Click on the group selection field in the contact area.

      The group menu opens.

   b) Select **All Contacts** or a group that contains the contact.

      The group name is displayed in the group selection field; the list thereunder displays the group first, then all associated contacts.

   c) Move the mouse pointer onto the contact in the contact list.

      You see additional controls.

   d) Select .

      The contextual action bar opens automatically, showing the first contact. All further contacts are added to the action bar directly.

2) Select in the action bar.

   The action menu opens.

3) Select **New Group**.

   The list entry changes to an input field.

4) Enter a group name and push the return key.

The new group is created and the contacts are assigned to this group.

You have assigned all selected private contacts to the new contact group.

4.5.21 How to Display all Private Contacts of a Group

You can display all private contacts of a group in the form of a list in the contact area.

Prerequisites

The contact area is displayed.

Step by Step

1) Click on the group selection field in the contact area.

The group menu opens.

2) Select the group the contacts of which you wish to display.

The group name is displayed in the group selection field; the list thereunder displays the group first, then all associated contacts.

You have displayed all private contacts of a group.

4.5.22 How to Delete a Contact Group

You can delete available contact groups in the contact area.

Prerequisites

The contact area is displayed.

At least one contact group has been created.

NOTICE:

You cannot delete the default group **All Contacts**.

Step by Step

1) Click on the group selection field in the contact area.

The group menu opens.

2) Select the group you wish to delete.

The group name is displayed in the group selection field.

3) Select ✎.

The display switches to the edit mode.

4) Select ✕.

5) Confirm the security prompt with **Delete**.

You have deleted the group.

Next steps

To leave the edit mode, select **Back**.

4.5.23 How to Initiate an Ad-hoc Conference with all Private Contacts of a Group

You can initiate an Ad-hoc phone conference with all private contacts of a contact group.

Prerequisites

The contact area is displayed.

Step by Step

1) Click on the group selection field in the contact area.

   The group menu opens.

2) Select the group.

   The group name is displayed in the group selection field; the list thereunder displays the group first, then all associated contacts.

3) Move the mouse pointer onto the group entry in the list.

   You see additional controls.

4) Select .

   The action menu opens.

5) Select **Call group**.

   A signaling bar displays the connection setup.

   Your preferred device rings.

6) How to accept a call:

NOTICE:

If the **Auto-Answer** feature is enabled for your preferred device, speaker and microphone of the terminal device or a connected headset become active automatically.

- If you wish to use the terminal device's receiver for the conference, just pick it up to accept the call.
- If you wish to use speaker and microphone of the terminal device or a connected headset, select in the signaling bar.

  Speaker and microphone of the terminal device or of a connected headset become active.

The conference is being set up.

A call control bar opens, displaying the new connection.

You have initiated an Ad-hoc phone conference with all private contacts of a contact group.

4.5.24 How to Send an E-Mail to all Private Contacts of a Group

You can send an e-mail simultaneously to all private contacts of a contact group.

Prerequisites

The contact area is displayed.

Step by Step

1) Click on the group selection field in the contact area.

The group menu opens.

2) Select the group.

The group name is displayed in the group selection field; the list thereunder displays the group first, then all associated contacts.

3) Move the mouse pointer onto the group entry in the list.

You see additional controls.

4) Select .

The action menu opens.

5) Select **E-Mail Group**.

NOTICE: You can see this option only if an e-mail address is available for at least one contact of the contact group.

Your e-mail application opens the window for a new e-mail. This e-mail is already furnished with the e-mail addresses of all recipients.

6) Write and send the e-mail message in your e-mail application as usual.

You have sent an e-mail to all private contacts of a contact group.

4.5.25 How to Start a Chat with all Private Contacts of a Group

You can start a chat with all private contacts of a contact group.

Prerequisites

The contact area is displayed.

Step by Step

1) Click on the group selection field in the contact area.

   The group menu opens.

2) Select the group.

   The group name is displayed in the group selection field; the list thereunder displays the group first, then all associated contacts.

3) Move the mouse pointer onto the group entry in the list.

   You see additional controls.

4) Select .

   The action menu opens.

5) Select **Chat with group**.

   The chat starts.

NOTICE:

If there is no instant-messaging address available for a participant, a message informs you accordingly.

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

4.5.26 How to Initiate a Web Collaboration Session with all Private Contacts of a Group

You can initiate a Web Collaboration session with all private contacts of a contact group.

Prerequisites

NOTICE:

This functionality is offered only for systems with WebCollaboration using Fastviewer. Therefore, this functionality is not offered for systems deployed to WebCollaboration using WebRTC.

The contact area is displayed.

Initiating a Web Collaboration session with persons who do not use UC-Application requires known e-mail addresses of such users.

Step by Step

1) Click on the group selection field in the contact area.

The group menu opens.

2) Select the group.

The group name is displayed in the group selection field; the list thereunder displays the group first, then all associated contacts.

3) Move the mouse pointer onto the group entry in the list.

You see additional controls.

4) Select .

The action menu opens.

5) Select **Start Web Collaboration**.

A signaling bar indicates a freshly started Web Collaboration session.

6) Select in the signaling bar.

The participant module for OpenScape Web Collaboration is being downloaded. The downloaded file is displayed to you in your browser under the downloads.

7) Start the participant module.

The Web Collaboration window opens.

NOTICE:

How to control the Web Collaboration session is described in the *OpenScape Web Collaboration, User Guide*.

NOTICE:

The notification inside the client related to the Web Collaboration is shown only to participants who have smart-client open. (The mail for the Collaboration is sent in any case)

4.5.27 How to Find a Contact in the Directory

You may wish to find a contact in the directory for example to view his/her contact data.

Prerequisites

The contact is present in the directory.

The contact area is displayed.

Step by Step

1) Enter the search text in the search field of the contact area.

   If your private contacts deliver search hits, they are displayed beneath the search field, continuously updated.

2) Select beneath the search field and the private hit list.

   > **NOTICE:**
   >
   > Alternatively, you can push the enter key.

   The contact is searched for in the directory.

   If search hits are found, they are displayed beneath the search field.

3) In order to display the contact's data, click on the corresponding search hit.

You have found a contact in the directory.

> **NOTICE:**
>
> For similar contacts which seem to be for the same entry, one merged entry with all data is displayed e.g. similar name, but same phone number and e-mail address.

Next steps

In order to delete the shown search result and to display the private contact list again, select × in the search field.

4.5.28 How to Copy a Contact from the Directory to your Private Contacts

You can find a contact in the directory and then copy him/her to your private contacts. As soon as you have copied a contact from the directory to your private contacts, he/she will automatically receive a request as to your monitoring his/her presence status. The user's answer will then decide whether or not you may see his/her presence status.

Prerequisites

The contact is present in the directory.

The contact area is displayed.

Step by Step

1) Enter the search text in the search field of the contact area.

   If your private contacts deliver search hits, they are displayed beneath the search field, continuously updated.

2) Select beneath the search field and the private hit list.

> **NOTICE:**
>
> Alternatively, you can push the enter key.

The contact is searched for in the directory.

If search hits are found, they are displayed beneath the search field.

3) Click on the contact to display his/her data.

> **NOTICE:**
>
> In case groupware connection is used and a private contact is created using the global address list in Exchange, contact details such as phone numbers may not be carried over to UC. As a result, these contact details will not be displayed in OpenScape Web Client's private contact list. Thus, it is advised that the user manually creates the private contact in Outlook.

4) Select **Add to contacts**.

5) If you wish to assign the contact to a group from your private contacts, select the group's name under **Groups**.

You can assign the contact to several groups.

The group name is highlighted in color.

You have copied a contact from the directory to your private contacts.

Next steps

In order to display the private contact list again, select **Back** and then in the search field.

4.5.29 How to manually Synchronize a Directory Contact

After you have copied a contact from the directory to your private contacts, you can freshly synchronize the associated contact data with the directory. Because you cannot change the contact data of such a contact locally, synchronizing the data becomes necessary after an alteration.

Prerequisites

You have copied the contact from the directory to your private contacts.

The contact area is displayed.

Step by Step

1) Click on the group selection field in the contact area.

The group menu opens.

2) Select **All Contacts** or a group that contains the contact.

The group name is displayed in the group selection field; the list thereunder displays the group first, then all associated contacts.

3) Select the contact's name.

You see all contact information.

4) Select .

You have synchronized a contact with the directory.

4.5.30 How to Call a Contact from the Directory

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

Prerequisites

The contact is present in the directory with a phone number.

The contact area is displayed.

Step by Step

1) Enter the search text in the search field of the contact area.

NOTICE:

After typing the first letters or a combination of letters of the contact’s name, the system will display a matching contact or a list of contacts from the existing directory, to facilitate your search. If your private contacts deliver search hits, they are displayed beneath the search field, continuously updated.

2) Select beneath the search field and the private hit list.

NOTICE:

Alternatively, you can push the enter key.

The contact is searched for in the directory.

If search hits are found, they are displayed beneath the search field.

3) Move the mouse pointer onto the contact.

You see additional controls.

4) Select .

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

5) Select a phone number for calling the contact.

A signaling bar displays the connection setup.

Your preferred device rings.

6) How to accept a call:

NOTICE:

If the **Auto-Answer** feature is enabled for your preferred device, speaker and microphone of the terminal device or a connected headset become active automatically.

- If you wish to use the terminal device's receiver for the conference, just pick it up to accept the call.
- If you wish to use speaker and microphone of the terminal device or a connected headset, select in the signaling bar.

  Speaker and microphone of the terminal device or of a connected headset become active.

The connection is being established.

A call control bar opens, displaying the new connection.

You have called a subscriber whose contact data are available in the directory.

4.5.31 How to Send an E-Mail to a Contact from the Directory

You can send an e-mail to a contact who is not one of your private contacts but whose data is available in the directory.

Prerequisites

The contact is present in the directory with an e-mail address.

The contact area is displayed.

Step by Step

1) Enter the search text in the search field of the contact area.

If your private contacts deliver search hits, they are displayed beneath the search field, continuously updated.

2) Select beneath the search field and the private hit list.

NOTICE:

Alternatively, you can push the enter key.

The contact is searched for in the directory.

If search hits are found, they are displayed beneath the search field.

3) Move the mouse pointer onto the contact.

You see additional controls.

4) Select .

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

5) Select the entry of the e-mail address.

Your e-mail application opens the window for a new e-mail. The recipient field contains already the contact's e-mail address.

6) Write and send the e-mail message in your e-mail application as usual.

You have sent an e-mail to a contact whose data is available in the directory.

4.5.32 How to Start a Chat with a Contact from the Directory

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

Prerequisites

The contact is present in the directory with an instant-messaging address.

The contact area is displayed.

Step by Step

1) Enter the search text in the search field of the contact area.

> **NOTICE:**
>
> After typing the first letters or a combination of letters of the participant’s name or telephone number, the system will display a matching contact or a list of contacts from the existing directory, to facilitate your search. You can click and select the corresponding contact from the available list.

If your private contacts deliver search hits, they are displayed beneath the search field, continuously updated.

2) Select beneath the search field and the private hit list.

> **NOTICE:**
>
> Alternatively, you can push the enter key.

The contact is searched for in the directory.

If search hits are found, they are displayed beneath the search field.

3) Move the mouse pointer onto the contact.

You see additional controls.

4) Select .

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

5) Select the instant-messaging address.

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

4.5.33 How to Initiate a Web Collaboration Session with a Contact from the Directory

You can initiate a Web Collaboration session with a contact who is not one of your private contacts but whose data is available in the directory.

Prerequisites

> **NOTICE:**
>
> This functionality is offered only for systems with WebCollaboration using Fastviewer. Therefore, this functionality is not offered for systems deployed to WebCollaboration using WebRTC.

The contact area is displayed.

Initiating a Web Collaboration session with a person who does not use UC-Application requires a known e-mail address of this user.

Step by Step

1) Enter the search text in the search field of the contact area.

   If your private contacts deliver search hits, they are displayed beneath the search field, continuously updated.

2) Select beneath the search field and the private hit list.

   > **NOTICE:**
   >
   > Alternatively, you can push the enter key.

   The contact is searched for in the directory.

   If search hits are found, they are displayed beneath the search field.

3) Move the mouse pointer onto the contact.

   You see additional controls.

4) Select .

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

5) Select **Start Web Collaboration**.

   A signaling bar indicates a freshly started Web Collaboration session.

6) Select in the signaling bar.

   The participant module for OpenScape Web Collaboration is being downloaded. The downloaded file is displayed to you in your browser under the downloads.

7) Start the participant module.

The Web Collaboration window opens.

NOTICE:

How to control the Web Collaboration session is described in the *OpenScape Web Collaboration, User Guide*.

NOTICE:

The notification inside the client related to the Web Collaboration is shown only to participants who have smart-client open. (The mail for the Collaboration is sent in any case)

4.5.34 How to import contacts from a csv file

Prerequisites

You have exported the data in csv-format from Outlook or from WebClient 1.0 or Comassist

NOTICE:

Import mechanism only supports UTF-8 scheme encoding. Make sure that the CSV file is saved with UTF-8 encoding before importing.

To save a CSV file by using the UTF-8 encoding format, follow these steps:

1. Open the CSV file by using Notepad.

2. In Notepad, click the File menu, and then click Save As.

3. In the Encoding list, select UTF-8, and then click Save.

You can import contacts from the generated csv-file.

NOTICE:

It is not intended to create the csv-file manually, the import may fail. Also do not modify an existing csv-file manually

The import of csv-file is available with V9R1 and onwards.

Step by Step

1) open settings (click on login name and select settings)
2) click on the **Contacts** tab
3) under **Contact Import** click on **Import**.
4) select the csv-file which contains the contacts
5) Click on Open

You have imported the contacts

4.5.35 How to export contacts from WebClient

You can export your contacts from WebClient.

Step by Step

1) Click on your avatar and select **Settings**.

2) Click on the **Contacts** tab.

3) Under **Contact Import/Export** click on **Export**.

4) Click **Save file**.

5) Save as `.csv`.

You have exported your contacts.

NOTICE:

The .CSV generated by the Export button is a standard one where the first line contains the definition of every column. e.g.:

"LastName","GivenName","DisplayName","Title","Description","CompanyName","
"HomeURL","Notice","Email","Email2","BusinessFax","Business","Home","Mobile
"AppSpecificPresenceInfo","SourceId","ContactGroup"

Therefore, this file must be configured accordingly in order to be imported into other products.

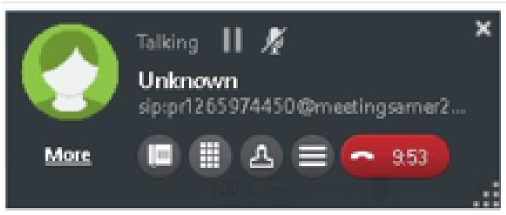
4.6 SIP URI Dialing

OpenScape UC WebClient can support video calls and video conferences with other companies by using SIP URI dialing. The following options are available:

- **Dial out**: Join video conferences or video calls of other companies through your Fusion client.
- **Dial in**: Invite members of other companies to attend a UC Video Conference.

Call Contrtol in a SIP URI call

In a SIP URI call you have the basic call control options as shown in the figure below. In addition, SIP URI calls are sorted in the Call History tab.



Supported syntax

The supported syntax is: `sip:<user>@<domain>` with the most common used SIP URI formats for video communications, as the following:

- – 1234567891234@videosystems.com

- John.Smith@videosystem.com
- Alice@10.11.12.13

4.6.1 How to Dial Out using Search or Dial

You can dial out via the search or dial box by entering the external contact's details in SIP URI format, e.g: *l50@meetingsamer29@webex.com*

4.6.2 How to Create an external SIP URI contact and Initiate a Call

You can save external contacts using their SIP URI format address in the Video field of the new contact's window.

Once added as a private contact you can initiate a call by clicking on the .

4.7 Call History

Each incoming and outgoing call creates an entry in the call history, thus logging information about the call. This way you can trace phone events anytime.

A call history entry may contain the following information in particular:

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

Beyond that you can directly contact the caller or callee via available communications channels– for example when you missed a call.

The time of call history entries not viewed yet is highlighted.

4.7.1 How to Display your Call History

You can display your call history in the content area.

Step by Step

Select 10 in the navigation bar.

Your call history is displayed in the content area.

If there are new call history entries you have not viewed yet, the number of these entries is displayed in a green square within the call history tab.

Since V9R1 sequential calls from the same person (as long as there are no call from another person in between) are grouped into one entry with the number of calls in parenthesis.

The details of each single call is visible in the detail view of the entry.

In case a call is forwarded or transferred several times, you see information only for the first and last connection.

The following descriptions are used in call history entries:

Description	Meaning
Forwarder to: <subscriber>	You forwarded an incoming call to **<subscriber>**.
Redirected to: <subscriber>	A call made by you was forwarded to and not accepted from **<subscriber>**.
Forwarded: <subscriber>	Incoming call forwarded to you by **<subscriber>** and not accepted.
Accepted from: <subscriber>	A call made by you was forwarded to and accepted from **<subscriber>**.
Accepted for: <subscriber>	A call forwarded to you by **<subscriber>** and accepted.
Picked up from: <subscriber>	An incoming call to you was picked up by **<subscriber>**.

4.7.2 How to Delete all Entries of your Call History

You can delete all entries of your call history with a mouse click.

Prerequisites

The call history is displayed in the content area.

IMPORTANT:

The following step deletes all of your call history entries irretrievably:

Step by Step

Select **Clear all**.

All entries are removed from your call history.

4.7.3 How to Delete an Entry from your Call History

You can delete single entries of your call history with a mouse click.

Prerequisites

The call history is displayed in the content area.

Step by Step

1) Move the mouse pointer onto the call history entry.

   You see the additional control ✕.

IMPORTANT:

The following step deletes the call history entry irretrievably:

---

2) Select ✕.

You have deleted an entry from your call history.

4.7.4 How to Filter the Entries of your Call History by Type

You can filter the entries of your call history by type to improve clarity.

Prerequisites

The call history is displayed in the content area.

The following entry types are suitable for filtering:

- All calls
- Missed calls
- Incoming calls
- Outgoing calls

Step by Step

1) Click on the column header of the type column.

   The type column always carries the name of the type by which the call history entries are currently filtered; thus one of the following names:

   - **All calls**
   - **Missed calls**
   - **Incoming calls**
   - **Outgoing calls**

   The type filter menu opens.

2) Select the type by which you wish to filter the call history entries.

   The name of the type column changes to the name of the selected type.

The call history displays only those entries that match the selected type.

Next steps

You can change the collation in your call history.

4.7.5 How to Change the Collation in your Call History

The entries in your call history are sorted by date and time. You can toggle this sorting to make the entries appear in ascending or descending order. The current collation is indicated by an arrow pointing upward or downward next to the **Date / Time** column heading.

Prerequisites

The call history is displayed in the content area.

Step by Step

Click on the **Date / Time** column heading.

The entries in the call history are resorted and the arrow next to the **Date / Time** column heading changes its pointing direction.

Next steps

In addition, you can filter the call history entries.

4.7.6 How to Initiate a Call via a Call History Entry

You can click on an entry in your call history to initiate a call. A click on the entry of a received call initiates a call to the associated caller, and if you wish to call a person again, click on the entry of the corresponding outbound call.

Prerequisites

The call history is displayed in the content area.

Step by Step

1) Move the mouse pointer onto the call history entry.

   You see additional controls.

2) Select  if you wish to call the caller or callee under his/her main phone number.

   If only a single number is given for a caller or callee, it is automatically his/her main phone number. If several phone numbers have been specified for a caller or callee, the number under **Work** is the main phone number.

   > **NOTICE:**
   >
   > If the caller or callee is defined by a phone number only, the relevant phone number is called.

   A signaling bar displays the connection setup.

   Your preferred device rings.

3) How to select the phone number for calling the caller or callee:

> **NOTICE:**
>
> This option is unavailable if the caller or callee is unknown and defined by a phone number only.

a) Select .

You see the phone numbers and addresses under which the caller or callee can be reached.

b) Select a phone number for calling the caller or callee.

A signaling bar displays the connection setup.

Your preferred device rings.

4) How to accept a call:

> **NOTICE:**
>
> If the **Auto-Answer** feature is enabled for your preferred device, speaker and microphone of the terminal device or a connected headset become active automatically.

- If you wish to use the terminal device's receiver for the conference, just pick it up to accept the call.
- If you wish to use speaker and microphone of the terminal device or a connected headset, select in the signaling bar.

  Speaker and microphone of the terminal device or of a connected headset become active.

The connection is being established.

A call control bar opens, displaying the new connection.

You have initiated a call from the call history.

4.7.7 How to Send an E-Mail via a Call History Entry

You can click on an entry in your call history to send an e-mail. A click on the entry of a received call allows sending an e-mail to the associated caller, and if you wish to send an e-mail to a person previously called, click on the entry of the corresponding outbound call.

Prerequisites

You know an e-mail address of the caller or callee– for example as associated entry in your private contacts.

The call history is displayed in the content area.

Step by Step

1) Move the mouse pointer onto the call history entry.

   You see additional controls.

2) Select ☰.

   You see the phone numbers and addresses under which the caller or callee can be reached.

3) Select the entry of the e-mail address.

   Your e-mail application opens the window for a new e-mail. In this e-mail you find the recipient's e-mail address already specified.

4) Write and send the e-mail message in your e-mail application as usual.

You have sent an e-mail from the call history.

4.7.8 How to Start a Chat via a Call History Entry

You can click on an entry in your call history to start a chat. A click on the entry of a received call initiates a chat with the associated caller, and if you wish to chat with a person previously called, click on the entry of the corresponding outbound call.

Prerequisites

The call history is displayed in the content area.

You know an instant-messaging address of the caller or callee– for example as associated entry in your private contacts.

Step by Step

1) Move the mouse pointer onto the call history entry.

   You see additional controls.

2) Select ☰.

   You see the phone numbers and addresses under which the caller or callee can be reached.

3) Select **Chat**.

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

4.7.9 How to Initiate a Web Collaboration Session via a Call History Entry

You can click on an entry in your call history to initiate a Web Collaboration session. A click on the entry of a received call initiates a call to the associated caller, and if you wish to call a person again, click on the entry of the corresponding outbound call.

Prerequisites

NOTICE:

This functionality is offered only for systems with WebCollaboration using Fastviewer. Therefore, this functionality is not offered for systems deployed to WebCollaboration using WebRTC.

The call history is displayed in the content area.

Initiating a Web Collaboration session with a person who does not use UC-Application requires a known e-mail address of this user– for example in the form of an entry in your private contacts.

Step by Step

1) Move the mouse pointer onto the call history entry.

You see additional controls.

2) Select .

You see the phone numbers and addresses under which the caller or callee can be reached.

3) Select **Start Web Collaboration**.

A signaling bar indicates a freshly started Web Collaboration session.

4) Select in the signaling bar.

The participant module for OpenScape Web Collaboration is being downloaded. The downloaded file is displayed to you in your browser under the downloads.

5) Start the participant module.

The Web Collaboration window opens.

NOTICE:

The notification inside the client related to the Web Collaboration is shown only to participants who have smart-client open. (The mail for the Collaboration is sent in any case)

4.8 One-Number Service (ONS)

The One-Number Service is a service of OpenScape UCApplication. It combines all phone numbers under which you can be reached.

This combining of phone numbers has the following advantages:

- Irrespective of how many devices you use for being available: You need to publish only one of your phone numbers to be reached– your ONS number.
- You can select the device the ONS number shall currently be assigned to anytime– the device you choose is your preferred one (OND).
- When you receive a call under your ONS number, it is always directly forwarded to your preferred device (OND). Whichever device you use for accepting the call, the caller always sees your ONS number.
- When you conduct an outgoing call from your preferred device(OND), the callee always sees your ONS number as originator number.

The One-Number Service does not come into effect in the following cases:

- When you are called under a number different from your ONS number.
- When you initiate a call from a device currently not set as your preferred one (OND).

Your preferred device can also be automatically determined in dependence of your respective presence status.

Custom device lists

You can create custom device lists. You can edit such custom device lists and determine them as your preferred device. If you determine a custom device list as preferred device, all incoming calls will be signaled on the devices contained in the list in succession until the call is accepted on one of the devices or until the last device of the list is reached.

If a call is not accepted on any of the devices, it is eventually forwarded to your voicebox.

Automatic forwarding of incoming calls

Automatic forwarding of incoming calls is bound to events.

Automatic forwarding is possible in the following cases:

- Busy line
- A call was not accepted after a specified period
- All circumstances

4.8.1 How to Determine your Preferred Device

You can determine which of your devices is to signal icoming calls. Independent from this selection, you can also choose a device for initiating outgoing calls.

Step by Step

1) Click on your login name in the header bar and select **Settings**.

The settings menu opens.

2) Switch to the **Devices** section.

NOTICE:

Alternatively, you can access the **Devices** section by clicking  in the header bar and then select **Device settings.**

---

3) You can set your preferred device for incoming and outgoing calls independently from each other:
   - To determine your preferred device for incoming calls, select the desired entry under **How would you like to be reached?**
   - To determine your preferred device for outgoing calls, select the desired entry under **How would you like to make calls?**

> **NOTICE:**
>
> If your preferred device for outgoing calls is the same as the one used for the calls you receive, then you can check the box **Same as incoming calls**.

4) Click **Save**.

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

Alternatively, you can determine your preferred device also via or in the header bar. As a result, will be displayed if you have set the same device for incoming and outgoing calls and if the two settings differ: Click

1) Click or in the header bar.
2) Select the preferred device or device list under **Incoming Calls**.
3) Select the preferred device or device list under **Outgoing calls**.

> **NOTICE:**
>
> Changing the **Incoming device** via the drop down list will also change the **Outgoing device** to the same value.
>
> For advanced control of preferred devices (additional option to keep preferred devices in sync or not) use the **Settings > Devices** options.

4.8.2 How to Set a Preferred Device to be Always Used for Incoming and Outgoing Calls

It is not mandatory to set different devices for incoming and outgoing calls. You can set a single preferred device for both communication directions instead.

Step by Step

1) Click on your login name in the header bar and select **Settings**.

   The settings menu opens.

2) Switch to the **Devices** section.

> **NOTICE:**
>
> Alternatively, you can access the **Devices** section by clicking in the header bar and then select **Device settings.**

3) Activate under **Personalize how you make and receive calls** the setting **Same as incoming calls**.
4) Click **Save**.

From now on, the device preferred for incoming calls will also be used for outgoing calls.

4.8.3 How to Make your Preferred Device Dependent on your Current Presence Status

You can have your current present status automatically determine the preferred device to be used for incoming calls.

Step by Step

1) Click on your login name in the header bar and select **Settings**.

   The settings menu opens.
2) Switch to the **Devices** section.

> **NOTICE:**
>
> Alternatively, you can access the **Devices** section by clicking in the header bar and then select **Device settings.**

3) Under **Your phones**, activate the option **I want my presence to determine how I receive calls from other people** by selecting the checkbox next to it.
4) Under this option, select a preferred device or a preferred device list to be assigned to each of the specified presence states, for example:
   - Available > Work phone
   - Away > Mobile phone
   - Do not disturb > Work phone
   - Be right back > Mobile phone
   - Busy > Work phone
   - In a meeting > MyPreferredList
5) Select **Save**.

When you set a presence status, it will from now on determine the device preferred for your incoming calls.

4.8.4 How to Change the Settings of a Device

You can change the settings of all of your devices.

Step by Step

1) Click on your login name in the header bar and select **Settings**.

The settings menu opens.

2) Switch to the **Devices** section.

NOTICE:

Alternatively, you can access the **Devices** section by clicking in the header bar and then select **Device settings.**

---

3) Under **Your phones,** click on the edit icon next to the device you need to update.

The display changes for editing the device.

4) Edit the name of the device under **Device name**.

Under this name the device will later be displayed in the device list.

5) Under **Ring and redirection preferences**, edit how a call shall be redirected from the device if you do not accept the call on this device.

- **Let my phone ring for [] seconds**

  If you do not accept an icoming call on this device within this period, the call will be forwarded to your voicebox.
- **Time out the redirected call after the standard amount of time (1 minute) has passed**

  If you do not accept an icoming call on this device within one minute, the call will be forwarded to your voicebox.
- **Do not provide a timeout for redirecting calls**

  Incoming calls are never forwarded.

6) Select **Save changes**.

7) Select **Save**.

You have changed the settings for the device.

4.8.5 How to Delete a Device

You can select a device from a list to make it your preferred one. Devices can be removed from this list anytime.

Step by Step

1) Click on your login name in the header bar and select **Settings**.

The settings menu opens.

2) Switch to the **Devices** section.

NOTICE:

Alternatively, you can access the **Devices** section by clicking in the header bar and then select **Device settings.**

3) Under **Your phones**, move your mouse over the device that should be deleted.

You see the additional control .

IMPORTANT:

The following step deletes the device and its settings irretrievably from the device list.

NOTICE:

You cannot delete the office phone.

4) Select .

The device is removed from the device list.

5) Select **Save**.

You have deleted the device.

4.8.6 How to Create a Device List

You can create custom device lists including your prederred devices. If you identify a custom device list as preferred device, all incoming calls will besignaled on the devices included in the list in succession until the call is accepted on one of the devices or until the last device of the list is reached. If a call is not accepted on any of the devices, it is then forwarded to your voicebox.

Prerequisites

Your preferred devices have been added under **Your phones**.

Step by Step

1) Click on your login name in the header bar and select **Settings**.

The settings menu opens.

2) Switch to the **Devices** section.

NOTICE:

Alternatively, you can access the **Devices** section by clicking in the header bar and then select **Device settings.**

3) Click on **View your custom device lists** under **Your phones**.

The individual device list opens.

4) Click **Add a new list**:

a) Enter a name for the list in the **List name** field.

b) Select the devices that will be included in the list from the **Choose a device** drop-down list.

> **NOTICE:**
>
> You can remove a device by clicking the delete icon ✕, which appears when you move your mouse over a device. This action deletes the device and its settings irretrievably from the individual device list.

c) Click **Add list**.

The new list is displayed under the section **View your custome device lists**.

5) Select **Save**.

4.8.7 How to Edit your Device List

In other OpenScape UCApplication clients you can create custom device lists you can edit as individual device list in the client.

Step by Step

1) Click on your login name in the header bar and select **Settings**.

The settings menu opens.

2) Switch to the **Devices** section.

> **NOTICE:**
>
> Alternatively, you can access the **Devices** section by clicking in the header bar and then select **Device settings.**

3) Select **View your custom device lists** under **Your phones**.

The individual device list opens.

4) Click on the edit icon next to the device list you need to update:

a) Update the name of the device list in the **List name** field.

b) Select additional devices from the **Choose a device drop-down list**.

c) Remove a device from the list by clicking on the delete icon ✕, which appears when you move your mouse over the corresponding device. This action deletes the device and its settings irretrievably from the individual device list.

5) Click **Save list**.

6) Click **Save.**

You have edited the device list.

4.8.8 How to Delete a Device List

Device lists can be removed anytime.

Step by Step

1) Click on your login name in the header bar and select **Settings**.

The settings menu opens.

2) Switch to the **Devices** section.

> **NOTICE:**
>
> Alternatively, you can access the **Devices** section by clicking in the header bar and then select **Device settings.**

3) Select **View your custom device lists** under **Your phones**. Move your mouse over the device list that should be deleted and click the delete icon

> **IMPORTANT:**
>
> This step deletes the device list and its settings irretrievably from the device list.

The device list is removed.

4) Select **Save**.

4.8.9 How to Configure and Activate Automatic Forwardings

You can automatically forward incoming calls depending on different events.

Automatic forwarding is possible in the following cases:

- Busy line
- If a call was not accepted after a specified period
- Under all circumstances

Step by Step

1) Click on your login name in the header bar.

The settings menu opens.

2) Select **Forwarding and Rules**.

3) Activate the **Enable call forwarding** option.

4) Specify a forwarding number for at least one of the following events in the associated field. Depending on which of the following options you configure you can also include various forwarding events simultaneously.

- **If my phone is busy, forward my calls to**
- **If I don’t answer, forward my calls to**
- **Forward all of my incoming calls**

> **NOTICE:**
>
> Before you can enter a phone number in this field you must tick the associated check box.
>
> If you configure this forwarding option, alternative options have no effect.

5) Select **Save**.

From now on, incoming calls are forwarded according to your configuration.

The icon at the **Forwarding** section header reminds you of having configured at least one automatic forwarding.

With V9R3 the entries for the call forwarding settings are cached, so if you deactivate Call Forwarding the entries are not deleted, they are only greyed out. When you activate Call Forwaring again, there is no need to enter the contacts again.

4.8.10 How to Disable all Automatic Call Forwardings

In the client settings the icon at the **Forwarding** section header reminds you of having configured at least one automatic forwarding. You can disable this configuration again.

Step by Step

1) Click on your login name in the header bar.

   The settings menu opens.

2) Select **Forwarding and Rules**.
3) Activate the **Do not forward any of my calls** option.
4) Select **Save**.

From now on, incoming calls will no longer be forwarded.

4.8.11 How to enable Simultaneous Ring feature

Simultaneous ringing feature allows the user to be alerted about incoming calls on the preferred device available and on the WebRTC softphone simultaneously. The call can be answered from either of the preferred device or the WebRTC softphone.

Follow the steps below to enable this feature:

Step by Step

1) Click on your login name in the header bar and select **Settings**.

   The settings menu opens.

2) Navigate to the **Devices** menu.
3) Enable the **Simultaneous ringing on UC softphone** option.
4) Click **Save**.

From now on, the Simultaneous Ring feature is activated.

NOTICE:

The Simultaneous Ringing feature will not work for calls distributed by Multi Line Hunt Groups (MLHG) if the UC user has set as preferred device an OND (not the ONS). The reason is that the OpenScape Voice does not allow a second deflect for MLHG calls.

4.9 Presence Service

The presence service is a service of OpenScape UCApplication. It informs other users whether you are ready for communication or busy, not wishing to be disturbed.

The following presence types are supported:

- User presence
- Device presence

You can decide who may view your presence status. There are the following options to enable this:

- Everybody may see your presence status.
- Nobody may see your presence status.
- You decide individually whether a user may see your presence status.

  In this case, custom presence status requests determine whether or not a user may see your current presence status. Such a presence status request is sent to you automatically when another user copies your contact from the directory to his/her private contacts.

  NOTICE:

  If there are pending presence status requests, the number of such requests is indicated in a green square next to your login name and on the **Presence** tab of the settings dialog.

Once you have permitted a user seeing your presence status you can also withdraw this user's privilege again.

User presence

You can set the user presence manually. This includes the following presence statuses:

Icon	Description
	**Away**
	**Available**
	**Do not disturb**
	**Busy**
	**Be right back**
	**In a meeting**

In addition, you can enter a status text to be displayed along with your user presence status.

Device presence

The device presence status is automatically determined by the system. This status is based on whether or not your preferred device is busy.

The user interface merely displays the device presence status **Busy**. You can see it when the user's preferred device is busy.

NOTICE:

Combined presence (user presence and device presence) is displayed for single line contact when line is busy.

The state **in a call** will be shown only when the presence state was **available**.

combined presence state

There will be a combined presence state (User state + media state) shown in the avatar.

This combined state can be "in a call". This combined state can neither be set nor used. It is informative only.

The combined state is derived as follows:

User State	Media State	Lync	Legacy Client	Combined State - UCMA Deployment	Combined State - All other deployements
Availabale	Busy	In a call	Available	In a call	In a call
Busy	Busy	In a call	Busy	In a call	In a call

User State	Media State	Lync	Legacy Client	Combined State - UCMA Deployment	Combined State - All other deployements
in a meeting	Busy	In a meeting	In a meeting	In a meeting	In a meeting
DND	Busy	DND	DND	DND	DND
Away	Busy	Away	Away	Away	In a call
Be right back	Busy	Be right back	Be right back	Be right back	In a call
Offline	Busy	Offline	Offline	Offline	Offline

4.9.1 How to Set your Presence Status

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

Step by Step

1) Select the icon of your current presence status – for example – in the header bar.

The presence setting menu opens.

2) Select the presence status.

Your new presence status is displayed in the header bar.

4.9.2 How to Provide your Individual Presence Status Text

You can provide other users with additional information about your current presence status by specifying an individual status text. Other users can see this status text in your contact details.

Step by Step

1) Select the icon of your current presence status– for example– in the header bar.

The presence menu opens.

2) Select **Change status text**.

The menu entry changes to an input field.

3) Enter a status text and push the return key.

> **NOTICE:**
>
> In order to delete a fixed status text, you must remove the available status text from the input field.

The new status text is displayed to you in the presence menu.

The individual status text is displayed to other users along with your current presence status in your contact details.

4.9.3 How to Determine the Default Presence Status for Logon / Logoff

You can determine the presence status to be set automatically after you have logged on or logged off.

Step by Step

1) Click on your login name in the header bar.

The settings menu opens.

2) Select **Settings**.

3) Switch to the **Presence** section.

4) Activate the desired settings under **My presence status during login/ logout**.

- **Opening the browser/logging in**

  Select here the presence status set automatically after your logging in.
- **Closing the browser/logging out**

  Select here the presence status set automatically after your logging off.

5) Select **Save**.

You have determined the default presence status for logging on and logging off.

4.9.4 How to Determine your Location

You can determine a location, shown to authorized users along with your presence status.

Step by Step

1) Click on your login name in the header bar.

The settings menu opens.

2) Select **Settings**.

3) Specify your current whereabouts under **Location**.

This location may be a town or building.

4) Select **Save**.

You have determined your location.

4.9.5 How to Determine the Viewers of your Presence Status

You can decide who may view your presence status. After giving a user the permission to view your presence status, you can have him/her automatically integrated in your private contacts also. Your presence status will appear as **Unknown** to users who are not allowed to view it.

Step by Step

1) Click on your login name in the header bar.

   The settings menu opens.
2) Select **Settings**.
3) Switch to the **Presence** section.
4) Specify under **Managing who sees my presence** in which way you wish to allow users viewing your presence status.
   - **Everyone can see my presence status**
   - **Nobody can see my presence status**
   - **Ask me when someone requests to see my presence status and let me choose**
5) Select **Save**.

Users will be allowed to view your presence status according to your configuration. Users who are allowed to view your status are als automatically integrated in your private contacts list.

4.9.6 How to Send a Presence Status Request

Each user can decide for himself/herself who may or may not view his/her presence status. As soon as you copy a contact from the directory to your private contacts, this user will automatically receive a request as to your monitoring his/her presence status. The user's answer will then decide whether or not you may see his/her presence status.

4.9.7 How to Reply to a Presence Status Request

Other users may send you a presence request, asking for the permission to view your presence status. You can answer such a presence request in different ways.

Step by Step

1) Click on your login name in the header bar.

   The settings menu opens.
2) Select **Settings**.
3) Switch to the **Presence** section.
4) Expand the list for **Pending presence status requests** by selecting the associated icon.
5) Move the mouse pointer onto the presence status request you wish to answer.

   You see additional controls.

6) Answer the presence status request in one of the following ways:

- Select **Block** if you do not want to allow the requesting user to view your presence status.

  After this decision, the requesting user is listed under **Users blocked from seeing your presence status**.
- Select **Accept** if you want to allow the requesting user to view your presence status.

  After this decision, the requesting user is listed under **Users allowed to see your presence status**.
- Select if you wish to delete the presence status request without taking a decision.

The presence status request is deleted from the list of **Pending presence status requests**.

You have answered a user's presence status request.

4.9.8 How to Display the Viewer States for your Presence Status

You can display all users who belong to one of the available viewer statuses.

There are the following viewer statuses:

- Users allowed to see your presence status
- Users blocked from seeing your presence status
- Users of whom a presence status request is pending

Step by Step

1) Click on your login name in the header bar.

   The settings menu opens.
2) Select **Settings**.
3) Switch to the **Presence** section.
4) Expand the viewer status list by selecting the associated icon. You can choose from the following lists:
   - Users allowed to see your presence status
   - Users blocked from seeing your presence status
   - Pending presence status requests

You see all users who belong to the selected viewer status.

4.9.9 How to Delete the Viewer Status of a User

You can display all users who belong to one of the available viewer statuses. You can remove single users from each of the associated lists. For example, you can withdraw a user's privilege to view your presence status.

Step by Step

1) Click on your login name in the header bar.

The settings menu opens.

2) Select **Settings**.

3) Switch to the **Presence** section.

4) Expand the viewer status list by selecting the associated icon. You can choose from the following lists:

- **Users allowed to see your presence status**
- **Users blocked from seeing your presence status**
- **Pending presence status requests**

5) Move the mouse pointer onto the user in the list.

You see the additional control ✕.

IMPORTANT:

The following step removes the user irretrievably from the viewer status list.

6) Select ✕.

The user has been deleted from the viewer status list.

Depending on the selected list the following thus applies:

- **Users allowed to see your presence status**

  You have withdrawn a user's privilege to still view your presence status.
- **Users blocked from seeing your presence status**

  The user is no longer blocked from seeing your presence status. Depending on your presence settings the following thus applies:
  - The user can now view your presence status automatically.
  - The user must ask for permission to view your presence status by presence status request.
- **Pending presence status requests**

  You have deleted the user's pending presence status request. If required, the user must send a new request to be allowed viewing your presence status.

4.10 Conferences

Various types of telephone conferences are supported.

- Ad-hoc conferences

  An Ad-hoc conference is a conference created dynamically and spontaneously and performed directly. If you want to stage a meeting with several persons and the contact list shows that all of them are available, you can select them and start a one-time audio conference.

  Ad-hoc conferences may comprise a maximum of 30 participants. If you wish to hold a conference with more than 30 participants, you must configure a persistent conference.
- Persistent conferences

  You configure a persistent conference just once. After it has come to an end, it remains configured and can be restarted. In a persistent conference, all participants have moderator privileges for the conference.

  Participants are either called by the system automatically (dial-out) at the conference start or must dial into the conference by themselves (dial-in).
- Scheduled conferences

  OpenScape UCApplication supports scheduled conferences. You can configure or edit them in the client, display and join them.

  In a scheduled conference, moderator privileges can be assigned to individual subscribers.

  Participants are either called by the system automatically (dial-out) at the conference start or must dial into the conference by themselves (dial-in).
- MeetNow! conferences

  MeetNow! conferences quickly with all external and internal participants. The conference room is exclusively defined by specifying an arbitrary PIN. I. e. all conference participants who dial the access number and enter the specified PIN are in the same conference room and can talk to each other directly.

  MeetNow! conferences can be started only by callers the conference portal can uniquely identify as OpenScape users. If an OpenScape user not uniquely identified is the first one to dial into a MeetNow! conference, he/she will hear music-on-hold until the first uniquely identified OpenScape user dials into the MeetNow! conference.

NOTICE:

The special character of MeetNow! conferences does not allow the conference portal to handle the assignment of access PINs. This may lead to participants using the same access PIN for different conferences. In this case the participants may be connected to each other in the same conference room unintentionally.

To handle the allocation of access PINs for MeetNow! conferences, each user can be assigned a personal access PIN. The participant will use this access PIN when inviting other participants to a MeetNow! conference. A personal access PIN may be derived from a company's extensions, for example.

- Device-controlled conferences (Large Conference)

  If you have set up several simultaneous phone connections, you can initiate a shared conference using those phone connections. Such a conference is independent from OpenScape UCApplication and performed exclusively by the communications system used.

The conference view in the content area displays exclusively scheduled and persistent conferences.

Representation of the Ad-hoc / MeetNow! conferences

Ad-hoc- / MeetNow! conferences are only represented by the existing phone connection to the conference system. There is no further representation in the content area. An extended conference control does not exist either.

Representation of scheduled Conferences

The content area shows the following information about scheduled conferences:

- Conference title
- Name of the conference creator
- Date and time of the conference
- Bridge number for the conference system
- Access PIN for the conference

You can sort the displayed conferences by the following information:

- Conference title
- Name of the conference creator
- Date and time of the conference

Started conferences are highlighted; irrespective of whether or not you have dialed into the conference.

You can configure or edit scheduled conferences, display and start them. You can join them also.

The detail view of a scheduled conference displays the following information in addition:

- Option for recording the names of conference participants
- Option for expanding a conference to a video conference
- Option for expanding a conference to a web conference
- Invited conference participants, possibly with a link to associated contact details

In case of conferences with a large number of participants, displaying the list of dialed-in participants is restricted and this display is not updated automatically. You can configure the number of participants that leads to a restricted list display.

Representation of persistent Conferences

The content area shows the following information about persistent conferences:

- Conference title
- Name of the conference creator
- Bridge number for the conference system
- Access PIN for the conference

Started conferences are always displayed topmost. You cannot sort the list entries. Started conferences are highlighted; irrespective of whether or not you have dialed into the conference.

You can configure, edit, display and delete persistent conferences. You can join them also.

The detail view of a persistent conference displays the following information in addition:

- Option for recording the names of conference participants
- Option for expanding a conference to a video conference
- Option for expanding a conference to a web conference
- Invited conference participants, possibly with a link to associated contact details

In case of conferences with a large number of participants, displaying the list of dialed-in participants is restricted and this display is not updated automatically. You can configure the number of participants that leads to a restricted list display.

Representing device-controlled conferences (Large Conference)

Device-controlled conferences are only represented by the existing phone connection. There is no further representation in the content area. An extended conference control does not exist either.

Controlling a Conference

When you join a persistent or scheduled conference, the associated call control is automatically displayed to you. In this call control you see the following conference information:

- Conference status
- Number of conference participants
- Names of the moderators
- Active speaker
- Dialed-in conference participants
- Conference participants not dialed in yet

Furthermore, the call control provides the following options:

- Muting / unmuting your own telephone
- Leaving the conference
- Contacting a single contact by instant message or e-mail
- Starting group instant messaging
- There are the following additional options for moderators:
  - Muting / unmuting the conference
  - Locking / unlocking the conference
  - Terminating the conference
  - Expanding moderator control options to a dialed-in participant
  - Muting / unmuting single participants
  - Removing single participants from a conference
  - Admitting participants not dialed in to the conference
  - Starting simultaneous web conferences

4.10.1 How to Initiate a Device-Controlled Conference (Large Conference)

If you have set up several simultaneous phone connections, you can initiate a shared conference using those phone connections. Such a conference is independent from OpenScape UCApplication and performed exclusively by the communications system used.

Prerequisites

You have set up several simultaneous phone connections.

Step by Step

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

You see a menu with connecting options.

2) Select **Merge calls together**.

All of your phone connections are combined to a conference.

You have initiated a device-controlled conference.

4.10.2 How to Display Available Conferences

You can display available conferences in the content area.

Step by Step

Select  in the navigation bar.

The conferences are displayed in the content area under **Active conferences**, **New/ Updated conferences** and **All conferences**.

If there are new conferences for you, that you have not viewed yet, the number of these conferences is displayed in a green square within the conference tab.

4.10.3 How to Display the Configuration Details of a Conference

You can display the details of scheduled conferences and of those conferences available anytime.

Prerequisites

The conferences are displayed in the content area.

Step by Step

In the **Scheduled conferences** or **Persistent conferences** area, select the conference's title.

The display changes to conference detail display.

Next steps

In order to return to the list of all conferences, select **Back to all conferences**.

4.10.4 How to Create a Persistent Conference

You can create a persistent conference to be subsequently started anytime. After this type of conference has come to an end, it remains configured and can be restarted.

Prerequisites

The contact area is displayed.

Step by Step

1) How to add a private contact as conference participant to the conference:

a) Enter one of the following search items in the search field of the contact area:

– Full second name or part of a second name

– Full first name or part of a first name

– Full phone number or part of a phone number

If your private contacts deliver search hits, they are displayed beneath the search field, continuously updated.

b) Move the mouse pointer onto the private contact.

You see additional controls.

c) Select .

The contextual action bar opens automatically, showing the first contact. All further contacts are added to the action bar directly.

d) If required, add further private contacts as conference participants in the same way.

2) How to add a contact from the directory as conference participant to the conference:

a) Enter one of the following search items in the search field of the window:

– Full second name or part of a second name

– Full first name or part of a first name

– Full phone number or part of a phone number

If your private contacts deliver search hits, they are displayed beneath the search field, continuously updated.

b) Select beneath the search field and the private hit list.

The contact is searched for in the directory.

If search hits are found, they are displayed beneath the search field.

c) Move the mouse pointer onto the contact.

You see additional controls.

d) Select .

The contextual action bar opens automatically, showing the first contact. All further contacts are added to the action bar directly.

e) If required, add further directory contacts as conference participants in the same way.

3) Select in the action bar.

The action menu opens.

4) Select **Create a conference**.

The display changes for adding a persistent conference.

The area of the invited participants displays you and all previously selected conference participants.

5) Give the conference a name under **Title**.

Under this name the conference will be displayed in the conference list.

6) How to specify moderators for the conference:

a) Select the **This conference is moderated**.

The area of invited participants displays the **Moderator** option for all conference participants.

b) If you wish to disable the **Moderator** option for a conference participant, move the mouse pointer onto the conference participant in the area of invited participants.

A check box for the **Moderator** option is displayed.

Disable the check box.

NOTICE:

You can activate the **Moderator** option for a conference participant in the same way.

NOTICE: You cannot disable the **Moderator** option if it is active for only one conference participant.

---

7) If conference participants are to record their names for joining the conference, select the **Record name** option.

8) If the conference is to comprise video streaming also, select the **Video** option.

9) If the conference is to comprise web conferencing also, select the **Web Collaboration** option.

10) If you wish to add further participants to the conference, select **Add new participants** in the area of invited participants.

The dialog for selecting new participants opens. Proceed in this dialog as already described with the initial participant selection.

11) How to remove a conference participant from the participant list:

a) Move the mouse pointer onto the conference participant in the area of invited participants.

You see additional controls.

b) Select ✕.

The conference participant is removed from the participant list.

12) The default procedure of joining a conference has the participant dialing in by himself/herself. However, you can make the system call a conference participant:

a) Move the mouse pointer onto the dial-in option **Call into the conference** of the conference participant in the area of invited participants.

The menu for dial-in options opens.

b) Select the **Call out from the conference** option.

The dial-in option of the conference participant is switched.

13) Select **Save**.

You have created a persistent conference.

4.10.5 How to Edit Settings of a Persistent Conference

You can edit the settings of a persistent conference retrospectively.

Prerequisites

The conferences are displayed in the content area.

Step by Step

1) Select the conference's title in the **Persistent conferences** area.

The display changes to conference detail display.

2) Select .

The display switches to the edit mode.

3) Give the conference a name under **Title**.

Under this name the conference will be displayed in the conference list.

4) How to specify moderators for the conference:

a) Select the **This conference is moderated**.

The area of invited participants displays the **Moderator** option for all conference participants.

b) If you wish to disable the **Moderator** option for a conference participant, move the mouse pointer onto the conference participant in the area of invited participants.

A check box for the **Moderator** option is displayed.

Disable the check box.

NOTICE:

You can activate the **Moderator** option for a conference participant in the same way.

NOTICE: You cannot disable the **Moderator** option if it is active for only one conference participant.

5) If conference participants are to record their names for joining the conference, select the **Record name** option.

6) If the conference is to comprise video streaming also, select the **Video** option.

7) If the conference is to comprise web conferencing also, select the **Web Collaboration** option.

8) If you wish to add further participants to the conference, select **Add new participants** in the area of invited participants.

The dialog for selecting new participants opens. Proceed in this dialog as already described with the initial participant selection.

9) How to remove a conference participant from the participant list:
   a) Move the mouse pointer onto the conference participant in the area of invited participants.

      You see additional controls.
   b) Select ✕.

   The conference participant is removed from the participant list.
10) The default procedure of joining a conference has the participant dialing in by himself/herself. However, you can make the system call a conference participant:
   a) Move the mouse pointer onto the dial-in option **Call into the conference** of the conference participant in the area of invited participants.

      The menu for dial-in options opens.
   b) Select the **Call out from the conference** option.

      The dial-in option of the conference participant is switched.
11) Select **Save** to apply the changes.

The display changes to the new conference detail display.

Next steps

In order to return to the list of all conferences, select **Back to all conferences**.

4.10.6 How to Delete a Persistent Conference

You can delete a persistent conference.

Prerequisites

The conferences are displayed in the content area.

Step by Step

1) Move the mouse pointer onto the conference's entry in the **Persistent conferences** area.

   You see additional controls.

   IMPORTANT:

   The following step will irretrievably delete the persistent conference.

2) Select ✕.

You have deleted a persistent conference.

4.10.7 How to Create a Scheduled Conference

You can create a scheduled conference, which will be active at the required time and duration.

Prerequisites

The contact area is displayed.

Step by Step

1) Enter a title in the **Title** text box.

> **NOTICE:**
>
> The title can be up to 200 characters.

2) Click on the **Web collaboration** check box, to include a web collaboration session.

3) Click on the **Video** check box, to include video streaming.

4) Click on the **Record name** box, to display the participant names.

5) Schedule the meeting by clicking on the check box:

a) Set the start date and time.

b) Set the end date and time.

c) Click **Save**.

6) To add participants, click **Add a new participant**.

> **NOTICE:**
>
> After typing the first letters or digits of the participant’s name or telephone number, the system will display a matching contact or a matching list of contacts from the existing directory, to facilitate your search. You can click and select the corresponding contact from the available list.

The number of participants will be updated every time a participant is added.

7) To specify moderators for the conference:
   a) Click on **This conference has a moderator**.

      The area of invited participants displays the **Moderator** option for all conference participants.
   b) If you wish to disable the **Moderator** option for a conference participant, move the mouse pointer onto the conference participant in the area of invited participants.

      A check box for the **Moderator** option is displayed.

      Disable the check box.

      NOTICE:

      You can activate the **Moderator** option for a conference participant in the same way.

      NOTICE: You cannot disable the **Moderator** option if it is active for only one conference participant.
8) To remove a conference participant from the participant list:
   a) Move the mouse pointer onto the conference participant in the area of invited participants.

      You see additional controls.
   b) Select .

   The conference participant is removed from the participant list.
9) The default procedure of joining a conference has the participant dialing in by himself/herself. However, you can make the system call a conference participant:
   a) Move the mouse pointer onto the dial-in option **Call into the conference** of the conference participant in the area of invited participants.

      The menu for dial-in options opens.
   b) Select the **Call out from the conference** option.

      The dial-in option of the conference participant is switched.
10) Click **Create**.

You have created a scheduled conference, which will be active at the configured time. The meeting PIN, as well as the bridge and the alternative numbers are displayed. Click **Show all**, to select another alternative number or **Regenerate PIN** to generate a new PIN.

NOTICE:

Recurrent conferences can be created only using OpenScape Calendar Extension via Microsoft Outlook.

4.10.8 How to Edit Settings of a Scheduled Conference

You can edit the settings of a scheduled conference retrospectively.

Prerequisites

The conferences are displayed in the content area.

Step by Step

1) Select the conference's title in the **Scheduled conferences** area.
The display switches to the edit mode.

2) You can edit the conference title in the **Title text box**.

3) You can disable or enable the **Moderator** option for a conference participant.

4) You can edit the start and end time and date for future meetings.

5) You can select or remove the **Record name** option.

6) You can select or remove the **Video** option.

7) You can add further participants to the conference, by selecting **Add new participant**.

8) You can remove a conference participant from the participant list.

9) Click **Save**.

The display changes to the new conference details display.

4.10.9 How to Delete a Scheduled Conference

You can delete a scheduled conference.

Prerequisites

The conferences are displayed in the content area.

Step by Step

1) Move the mouse pointer onto the conference's entry in the **Scheduled conferences** area.

You see additional controls.

> **IMPORTANT:**
>
> The following step will irretrievably delete the persistent conference.

2) Select .

You have deleted a scheduled conference.

4.10.10 How to Decline Taking Part in a Conference before the Conference Start

You can decline taking part in scheduled or persistent conferences.

Prerequisites

The conferences are displayed in the content area.

Step by Step

1) In the **Scheduled conferences** or **Persistent conferences** area, select the conference's title.

   The display changes to conference detail display.

2) Select **Decline**.

The conference is deleted from the conference list.

4.10.11 How to Call a Participant before the Start of a Conference

You can call a selected participant of a scheduled or persistent conference before the conference begins.

Prerequisites

The conferences are displayed in the content area.

Step by Step

1) In the **Scheduled conferences** or **Persistent conferences** area, select the conference's title.

   The display changes to conference detail display.

2) Move the mouse pointer onto the conference participant in the area of invited participants.

   You see additional controls.

3) Select  if you wish to call the conference participant under his/her main phone number.

   If only a single number is given for a conference participant, it is automatically his/her main phone number. If several phone numbers have been specified for a contact, the number under **Work** is the main phone number.

   > **NOTICE:**
   >
   > If the conference participant is defined by a phone number only, the relevant phone number is called.

   A signaling bar displays the connection setup.

   Your preferred device rings.

4) How to select a phone number for calling a conference participant:

> **NOTICE:**
>
> This option is unavailable if the conference participant is defined by a phone number only.

a) Select ☰.

You see the phone numbers and addresses under which the conference participant can be reached.

b) Select a phone number for calling the conference participant.

A signaling bar displays the connection setup.

Your preferred device rings.

5) Accept a call.

> **NOTICE:**
>
> If the Auto-Answer feature is enabled for your preferred device, speaker and microphone of the terminal device or a connected headset become active automatically.

The connection to the conference participant is being established.

A call control bar for the new connection opens.

You have called a conference participant.

Next steps

In order to return to the list of all conferences, select **Back to all conferences**.

4.10.12 How to Send an E-Mail to a Participant before the Start of a Conference

You can send an e-mail to a selected participant of a scheduled or persistent conference before the conference begins.

Prerequisites

The conferences are displayed in the content area.

An e-mail address is available for the conference participant, for example as associated entry in your private contacts.

Step by Step

1) In the **Scheduled conferences** or **Persistent conferences** area, select the conference's title.

The display changes to conference detail display.

2) Move the mouse pointer onto the conference participant in the area of invited participants.

   You see additional controls.

3) Select ☰.

   The action menu opens.

4) Select the entry of the e-mail address.

   Your e-mail application opens the window for a new e-mail. In this e-mail you find the recipient's e-mail address already specified.

5) Write and send the e-mail message in your e-mail application as usual.

You have sent an e-mail to a conference participant.

Next steps

In order to return to the list of all conferences, select **Back to all conferences**.

4.10.13 How to Send an E-Mail to Participants before the Start of a Conference

You can send an e-mail to the participants of a scheduled or persistent conference before the conference starts– for example to provide them with preparative documents.

Prerequisites

The conferences are displayed in the content area.

Step by Step

1) In the **Scheduled conferences** or **Persistent conferences** area, select the conference's title.

   The display changes to conference detail display.

2) Select ☰.

   The action menu opens.

3) Select **E-Mail Group**.

   NOTICE: You can see this option only if an e-mail address is available for at least one conference participant.

   Your e-mail application opens the window for a new e-mail. This e-mail is already furnished with the e-mail addresses of all recipients.

4) Write and send the e-mail message in your e-mail application as usual.

You have sent an e-mail to all participants of the conference.

NOTICE:

Due to a 2000 character limitation of the Windows mailto URL handler the addresses will be cut when this limit is exceeded.

Subject and body are always left empty.

Next steps

In order to return to the list of all conferences, select **Back to all conferences**.

4.10.14 How to Start a Chat with a Participant before the Start of a Conference

You can call a selected participant of a scheduled or persistent conference before the conference begins.

Prerequisites

The conferences are displayed in the content area.

An instant-messaging address is available for the conference participant, for example as associated entry in your private contacts.

Step by Step

1) In the **Scheduled conferences** or **Persistent conferences** area, select the conference's title.

   The display changes to conference detail display.
2) Move the mouse pointer onto the conference participant in the area of invited participants.

   You see additional controls.
3) Select ☰.

   The action menu opens.
4) Select **Chat**.

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

Next steps

In order to return to the list of all conferences, select **Back to all conferences**.

4.10.15 How to Start a Chat with Participants before the Start of a Conference

You can start a chat with all participants of a scheduled or persistent conference before the conference begins.

Prerequisites

The conferences are displayed in the content area.

Step by Step

1) In the **Scheduled conferences** or **Persistent conferences** area, select the conference's title.

   The display changes to conference detail display.

2) Select ☰.

   The action menu opens.

3) Select **Chat with group**.

   NOTICE:

   If there is no instant-messaging address available for a participant, a message informs you accordingly.

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

Next steps

In order to return to the list of all conferences, select **Back to all conferences**.

4.10.16 How to Start a Conference

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

Prerequisites

The conferences are displayed in the content area.

You must be a moderator of the conference to start a moderated conference.

NOTICE:

An **unmoderated** conference may start automatically when you dial in.

A **moderated** conference starts with your dialing in automatically only if you are the conference's moderator. If you dial into a moderated conference not started yet and you are not the conference's moderator, you will not be connected to the conference room until the first moderator dials into the conference. In the meantime you hear a corresponding hold announcement.

Step by Step

1) Move the mouse pointer onto the conference's entry in the **Scheduled conferences** or **Persistent conferences** area.

   You see additional controls.

2) Select .

   A signaling bar displays the connection setup.

   Your preferred device rings.

3) How to accept a call:

   NOTICE:

   If the **Auto-Answer** feature is enabled for your preferred device, speaker and microphone of the terminal device or a connected headset become active automatically.

   - If you wish to use the terminal device's receiver for the conference, just pick it up to accept the call.
   - If you wish to use speaker and microphone of the terminal device or a connected headset, select  in the signaling bar.

     Speaker and microphone of the terminal device or of a connected headset become active.

   The connection is being established.

   A call control bar opens, displaying the new connection.

4) Follow the announcements to enter the conference room.

You have started the conference and entered the conference room.

A signaling bar informing about the freshly started conference is displayed to all other invited conference participants in their client.

4.10.17 How to Join a Started Conference

When you are invited for a scheduled or persistent conference and wish to take part, you must dial in by yourself if dialing in manually has been configured for you. Alternatively, you can click the conference URL sent to you via the conference notification E-mail and access the OpenScape Web Client in order to join the conference. The start of a conference is indicated to you by a signaling bar. Using the controls of this signaling bar you can dial into the conference.

Prerequisites

You have received the conference notification E-mail including the conference URL.

NOTICE:

If already logged in the OpenScape Web Client, you can access the conference via the signaling bar. Otherwise, the conference URL redirects you to the OpenScape Web Client external floor control, which provides access to the OpenScape Web Client.

A signaling bar indicates a freshly started conference.

NOTICE:

If you have already closed the signaling bar of the freshly started conference using , you can dial into the conference as follows:

Switch to the conferences in the content area. Move the mouse pointer onto the conference's entry in the **Scheduled conferences** or **Persistent conferences** area and select .

Step by Step

1) Select in the signaling bar.

   The signaling bar closes.

   A new signaling bar displays the connection setup.

   Your preferred device rings.

2) How to accept a call:

   NOTICE:

   If the **Auto-Answer** feature is enabled for your preferred device, speaker and microphone of the terminal device or a connected headset become active automatically.

   - If you wish to use the terminal device's receiver for the conference, just pick it up to accept the call.
   - If you wish to use speaker and microphone of the terminal device or a connected headset, select in the signaling bar.

     Speaker and microphone of the terminal device or of a connected headset become active.

   The connection is being established.

   A call control bar opens, displaying the new connection.

3) Follow the announcements to enter the conference room.

You have entered the conference room of the started conference.

4.10.18 How to Decline Taking Part in a Conference after the Conference Start

The start of a conference you have been invited for is indicated to you by a signaling bar. Using the controls of this signaling bar you can reject taking part in this conference.

Prerequisites

A signaling bar indicates a freshly started conference.

Step by Step

Select in the signaling bar.

The signaling bar closes.

You have rejected taking part in a started conference.

Next steps

However, if you wish to take part in the conference later on, switch to the conferences in the content area. Move the mouse pointer onto the conference's entry in the **Scheduled conferences** or **Persistent conferences** area and select .

4.10.19 How to Display the Connection Details of a Conference

An active conference is displayed by a call control bar. This call control bar contains already various basic information about the respective conference– for example the number of participants. Using the controls of the call control bar you can display further details of a conference.

Prerequisites

You are connected to a conference.

Step by Step

1) Select **Show Details** in the call control bar of the conference connection. The call control bar extends downward and shows the single conference participants. The currently active speaker is highlighted.

> **NOTICE:**
>
> When the number of conference participants reaches a certain threshold (e.g. 15 participants), the details of participants who join or leave the conference are no longer automatically updated. However, you can manually refresh the floor control information.

2) Select on the right of the call control bar of the conference connection to refresh the participant details.

4.10.20 How to Move participants from Large to Rich Conference

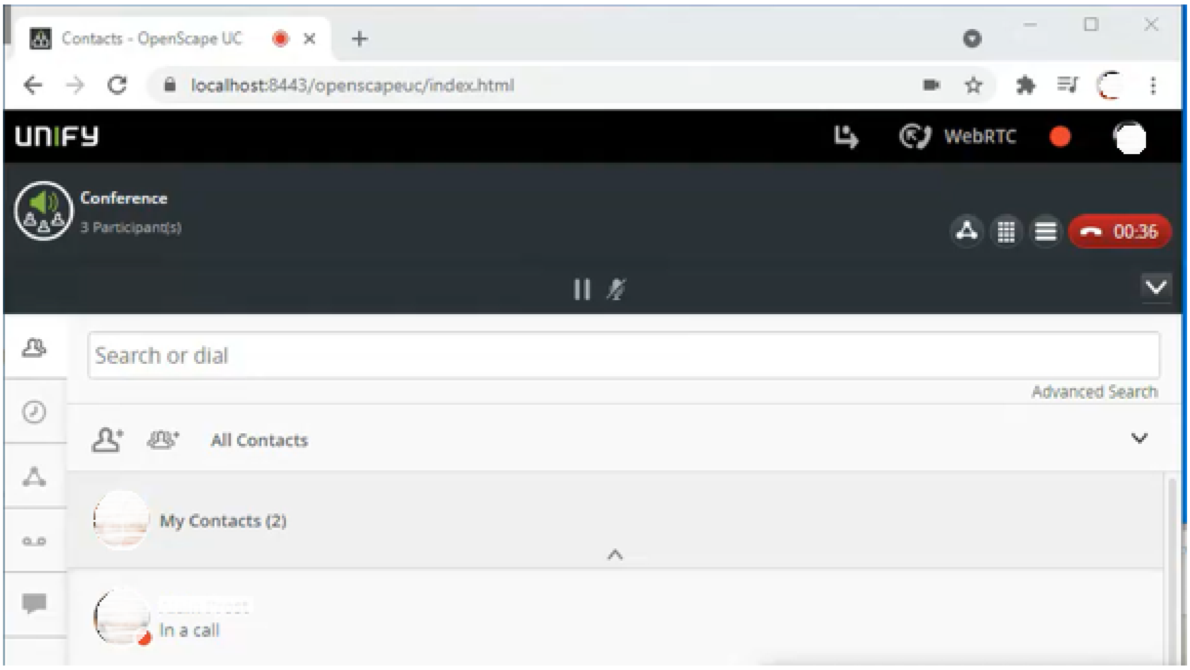
You can move all participants that are already talking in a voice conference (Large Conference) to a rich conference (MS Conference) in order to access more features, such as video and screen sharing, improving the collaborative work in a longer discussion.

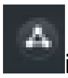
Prerequisites

You are connected to a Large conference.

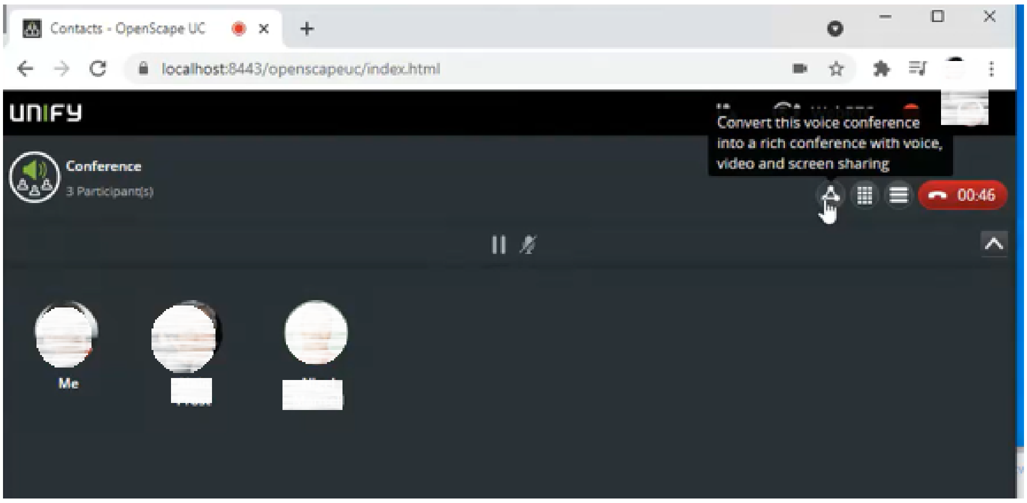
Step by Step

1) During a voice conference one or more participants want to access additional collaboration features, e.g. screen-sharing.

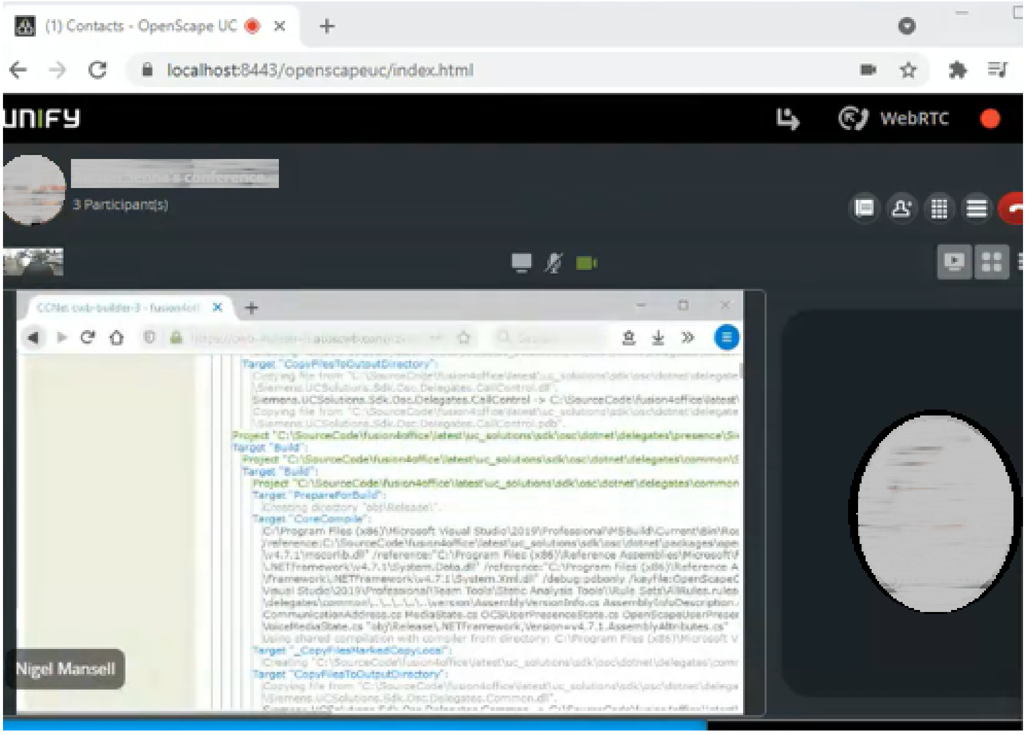


2) Click on  in the call control bar of the voice conference to convert it into a rich conference.

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

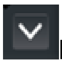


3) Now all conference participants are in the rich conference interface where they can share documents, video and use other collaborative tools as show in the figure below:



4.10.21 Conference Call Control

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

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

The Conference Call control buttons are the following:

-  - Display/Hide the List of Participants
-  - Display/Hide video view of active speakers
-  - Display the Only Call Control view
-  - Start video streaming
-  - Mute/Unmute your audio
-  - Start/Stop Screen Sharing

---

NOTICE:

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

Conference Recording:

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

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

4.10.21.1 Conference list of Participants

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

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

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

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

4.10.22 How to Mute Yourself in a Conference

An active conference is displayed by a call control bar. Using the controls of this call control bar you can mute your own device– for example when you are in a noisy environment and do not wish to disturb the other conference participants.

Prerequisites

You are connected to a conference.

Step by Step

Select in the call control bar of the conference connection.

The other conference participants cannot hear you anymore. The icon changes to .

Next steps

In order to make yourself audible again, select .

4.10.23 How to Lift Your Own Muting

An active conference is displayed by a call control bar. Using the controls of this call control bar you can mute your own device. You can lift this muting.

Prerequisites

You are connected to a conference.

Step by Step

Select in the call control bar of the conference connection.

The other conference participants can hear you again.

4.10.24 How to Mute an Active Conference

There is a **Mute Conference** feature in the Communication Options menu that allows any participant to mute all other participants in the conference. This option might be useful in some special cases such as a conferences with a large number of participants when someone is making a presentation or introduction that should not be interrupted.

Prerequisites

You are connected to a conference.

Step by Step

1) Click on the button on call control bar of the conference connection.

2) Click on **Mute conference** to mute all the other participant.

After this Mute Conference action, every participant that got muted will need to unmute themselves manually.

4.10.25 How to Unmute a Conference Connection

An active conference is displayed by a call control bar. Using the controls of this call control bar you can mute the conference connection. And you can lift this muting again.

Prerequisites

You are connected to a conference.

The active conference is muted.

Step by Step

Select  in the call control bar of the conference connection.

The conference connection is unmuted. The  icon changes to .

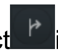
4.10.26 How to Hand an Active Conference over to Another Device

An active conference is displayed by a call control bar. Using the call controls of this call control bar you can hand the active conference over to another device without having to close the connection.

Prerequisites

You are connected to a conference.

Step by Step

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

   The action menu opens.

2) Select under **Switch to a different device** the device for resuming the call.

   A signaling bar displays the connection setup.

   The device rings.

3) How to accept a call:

> **NOTICE:**
>
> If the **Auto-Answer** feature is enabled for your preferred device, speaker and microphone of the terminal device or a connected headset become active automatically.

- If you wish to use the terminal device's receiver for the conference, just pick it up to accept the call.
- If you wish to use speaker and microphone of the terminal device or a connected headset, select in the signaling bar.

  Speaker and microphone of the terminal device or of a connected headset become active.

The active call is being handed over.

You have changed the device.

> **NOTICE:**
>
> Please do not handover calls to the WebRTC softphone of other UC users as this will affect call control functionality.

4.10.27 How to Send an E-Mail to Participants after the Start of a Conference

An active conference is displayed by a call control bar. Using the controls of this call control bar you can send an e-mail to all participants– for example to distribute meeting papers.

Prerequisites

You are connected to a conference.

Step by Step

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

The action menu opens.

2) Select **E-Mail Group**.

> **NOTICE:** You can see this option only if an e-mail address is available for at least one conference participant.

Your e-mail application opens the window for a new e-mail. This e-mail is already furnished with the e-mail addresses of all recipients.

3) Write and send the e-mail message in your e-mail application as usual.

You have sent an e-mail to all participants of the conference.

4.10.28 How to Start a Chat with a Participant after the Start of a Conference

An active conference is displayed by a call control bar. Using the controls of this control bar you can start a chat with a selected participant– for example to exchange a written note.

Prerequisites

You are connected to a conference.

Step by Step

1) Select **Show Details** in the call control bar of the conference connection.

The call control bar extends downward and shows the single conference participants.

2) Select the conference participant.

You see an action menu.

3) Select **Chat**.

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

4.10.29 How to Start a Chat with Participants after the Start of a Conference

An active conference is displayed by a call control bar. Using the controls of this control bar you can start a chat with all participants– for example to exchange a written note.

Prerequisites

You are connected to a conference.

Step by Step

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

The action menu opens.

2) Select **Start chat**.

The chat starts.

> **NOTICE:**
>
> If there is no instant-messaging address available for a participant, a message informs you accordingly.

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

4.10.30 How to Start a Web Collaboration Session in a Conference

An active conference is displayed by a call control bar. Using the operating elements of this call control bar you can take part in a started, additional Web Collaboration session.

Step by Step

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

- **Fastviewer Web Collaboration deployment mode:**

  The Fastviewer client file will start downloading from your web browser. Open this file once finished downloading to start the web collaboration.
- **WebRTC Screen Sharing deployment mode:**

  The options to select the screen you want to share will be automatically displayed without the need to download any file. The other parties will see your screen sharing in the designated Call Control section. Fore more details please refer to section Web Collaboration.

NOTICE:

How to control the Web Collaboration session is described in the *OpenScape Web Collaboration, User Guide*.

4.10.31 How to Close a Conference Connection

An active conference is displayed by a call control bar. Using the controls of this call control bar you can close your connection to the conference. After your leaving the conference it persists and all other participants remain connected to it.

Prerequisites

You are connected to a conference.

Step by Step

How to close the conference connection:

- If you use the terminal device's receiver for the call, simply put it down.
- If you use speaker and microphone of the terminal device or a connected headset for the call, select  in the call control bar of the active call.

  Speaker and microphone of the terminal device or of a connected headset are switched off.

The call control bar closes.

You have closed the conference connection.

4.10.32 Communication options in a persistent conference

When you have created a persistent conference you can use also communication options. (Chat with group, Mail notification, Mail notification with new PIN)

Prerequisites

You have created a persistent conference

Step by Step

1) Click in tab **Persistent** in the menu **Conferences.**

2) In the related conference in the line with **Me** click on the right side on the symbol .

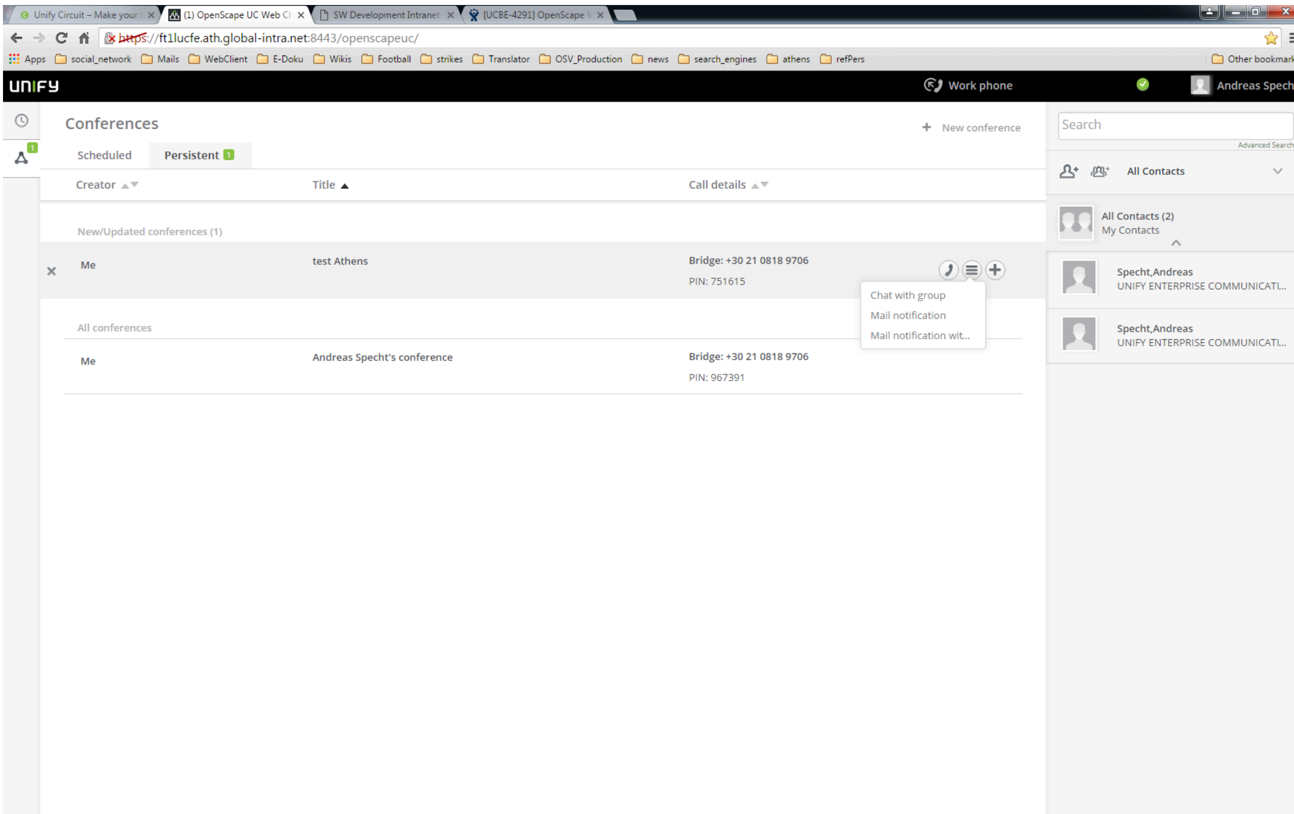
The following options are available:

- Chat with group
- Mail notification

NOTICE:

Conference details are sent to another user which is not in the conference list and thus the created mail will not include the conference recipients.

- Mail notification with PIN

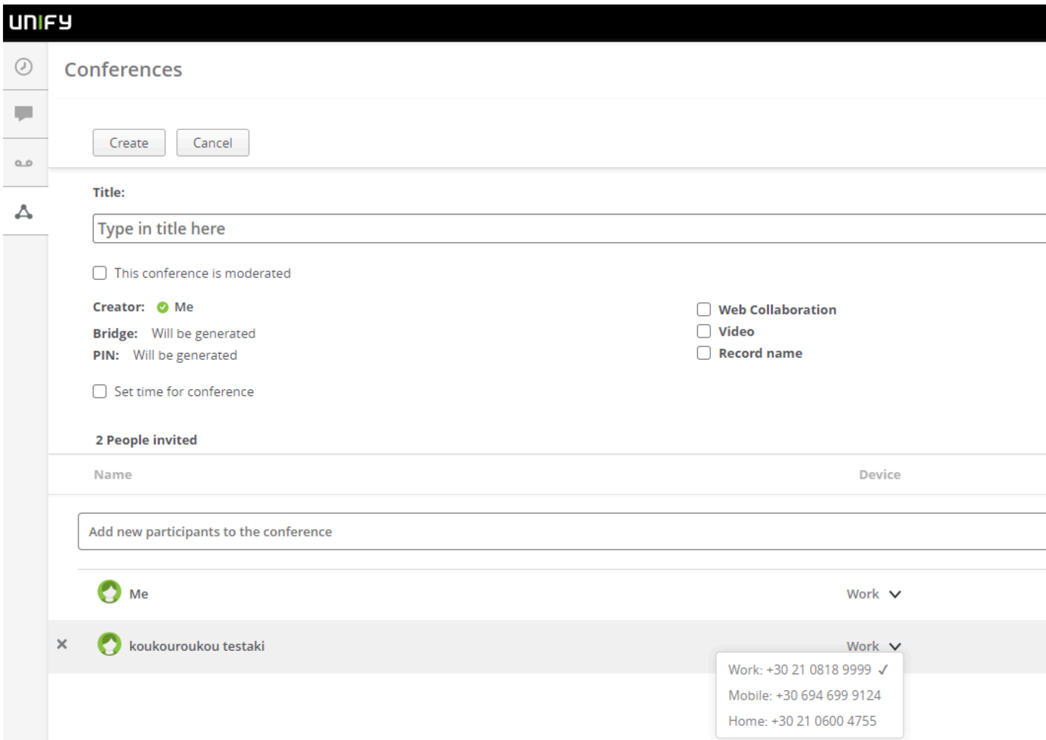


NOTICE:

Due to a 2000 character limitation of the Windows mailto URL handler the new mail including addresses, subject and body will be cut when this limit (including encoding for special characters) is exceeded.

4.10.33 Select number for conference partner

With UC V9R4 it is possible to select the number of the conference partner. This is useful when you know your partner is not in the office, but reachable via mobile.



Click on the arrow next to "work".

4.10.34 Additional Moderator Features

In order to use specific conferencing features, you must have been assigned moderator privileges for the conference.

4.10.34.1 How to Lock a Conference

An active conference is displayed by a call control bar. Using the controls of this call control bar you can lock the conference. This keeps further participants from dialing in.

Prerequisites

You are connected to a conference.

You must be a moderator of the conference to lock a moderated conference.

Step by Step

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

   The action menu opens.

2) Select under **Moderator options** the **Unlock conference** option.

From now on no further participants can dial into the conference.

Example

NOTICE:

Although participants cannot join the locked conference after dialing the conference bridge number, they can join the conference via the signaling bar on the OpenScape Web Client user interface, if the conference is active.

4.10.34.2 How to Unlock a Conference

An active conference is displayed by a call control bar. Using the controls of this call control bar you can lock the conference. In order to admit further participants to the conference you can unlock the conference again.

Prerequisites

You are connected to a conference.

You must be a moderator of the conference to start a moderated conference.

Step by Step

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

   The action menu opens.

2) Select under **Moderator options** the **Lock conference** option.

From now on further participants can dial into the conference.

4.10.34.3 How to Add Participants to a Started Conference

You can add further participants to a started conference– for example invited participants who have not yet dialed into the conference or participants who have not been invited for the conference at all.

Prerequisites

You are connected to a conference.

Step by Step

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

You see a menu with connecting options.

2) Select **Add to Conference**.

The dialog for selecting a subscriber opens.

3) How to add a private contact:

a) Enter one of the following search items in the search field of the contact area:

– Full second name or part of a second name

– Full first name or part of a first name

– Full phone number or part of a phone number

If your private contacts deliver search hits, they are displayed beneath the search field, continuously updated.

b) Move the mouse pointer onto the private contact.

You see additional controls.

c) Select .

The contact is displayed in the contextual action bar.

4) How to add a contact from the directory:
   a) Enter one of the following search items in the search field of the window:
      – Full second name or part of a second name
      – Full first name or part of a first name
      – Full phone number or part of a phone number

      If your private contacts deliver search hits, they are displayed beneath the search field, continuously updated.
   b) Select beneath the search field and the private hit list.

      The contact is searched for in the directory.

      If search hits are found, they are displayed beneath the search field.
   c) Move the mouse pointer onto the contact.

      You see additional controls.
   d) Select .

      The contact is displayed in the contextual action bar.
5) How to add a contact-independent phone number:
   a) Enter the phone number in the search field of the contact area.
   b) Select .

      The phone number is displayed in the contextual action bar.
6) Select **Done**.

   The phone connection is being established. After the callee has accepted the call he/she is connected to the conference.

4.10.34.4 How to Assign Moderator Privileges to a Conference Participant

An active conference is displayed by a call control bar. Using the controls of this control bar you can assign moderator privileges to a selected participant for moderated conferences. He/she can then manage the conference more comprehensively.

Prerequisites

You are connected to a moderated conference.

You are the conference's moderator.

The conference participant does not have any moderator privileges.

Step by Step

1) Select **Show Details** in the call control bar of the conference connection.

   The call control bar extends downward and shows the single conference participants.
2) Select the conference participant.

   You see an action menu.
3) Select **Add as moderator**.

The conference participant is now enabled to use moderator features.

4.10.34.5 How to Join a Conference as a Moderator

Moderators can join a conference with moderator priviledges by entering the moderator’s pin, which is available in the notification e-mail generated by the system.

Prerequisites

The system administratot has enabled the moderator pin feature in the OpenScape UC Application.

You have created a moderated conference.

The system has generated the conference notification e-mail with the conference access details.

Step by Step

1) Dial the corresponding bridge number displayed in the conference notification e-mail.

2) Enter the conference room PIN followed by the `#` key.

3) To join the conference as a moderator:

a) Dial `*` then `6` if you are using iPhone or OSMO, alternatively

b) Dial `*` then `8` if you are not using your ONS device.

> **NOTICE:**
>
> The dialing options **"6"** and **"8"** may vary according to the configuration of the OpenScape UC Application. You must consult the conference notification e-mail, which includes the correct dialing options for each case.

4) Enter the moderator’s PIN followed by the `#` key.

You have joined the conference as a moderator. In case you dial the wrong number, you can enter the `#` key to return to the conference. You can then dial the moderator options, such as `*6 or *8`, to try again.

4.10.34.6 How to Withdraw Moderator Privileges from a Conference Participant

An active conference is displayed by a call control bar. Using the controls of this control bar you can withdraw moderator privileges from a selected participant for moderated conferences.

Prerequisites

You are connected to a moderated conference.

You are the conference's moderator.

The conference participant has moderator privileges.

Step by Step

1) Select **Show Details** in the call control bar of the conference connection.

   The call control bar extends downward and shows the single conference participants.

2) Select the conference participant.

   You see an action menu.

3) Select **Remove as moderator**.

The conference participant cannot use any moderator features anymore.

4.10.34.7 How to Mute a Conference Participant

An active conference is displayed by a call control bar. Using the controls of this call control bar you can mute a selected participant– for example when he/she takes part from a rather noisy environment.

Prerequisites

You are connected to a conference.

Step by Step

1) Select **Show Details** in the call control bar of the conference connection.

   The call control bar extends downward and shows the single conference participants.

2) Select the conference participant.

   You see an action menu.

3) Select **Mute**.

   The image of the participant is represented with .

The conference participant is muted.

4.10.34.8 How to Unmute a Conference Participant

An active conference is displayed by a call control bar. Using the controls of this control bar you can mute a selected participant. And you can lift this muting again.

Prerequisites

You are connected to a conference.

A conference participant is muted.

Step by Step

1) Select **Show Details** in the call control bar of the conference connection.

   The call control bar extends downward and shows the single conference participants.

2) Select the conference participant.

You see an action menu.

3) Select **Unmute**.

The image of the participant appears now unchanged.

The conference participant is audible again.

4.10.34.9 How to Close the Connection to a Conference Participant

An active conference is displayed by a call control bar. Using the controls of this control bar you can disconnect a selected participant from the conference.

Prerequisites

You are connected to a conference.

Step by Step

1) Select **Show Details** in the call control bar of the conference connection.

The call control bar extends downward and shows the single conference participants.

2) Select the conference participant.

You see an action menu.

3) Select **Disconnect them**.

The image of an invited participant appears grayed out in the conference details; the image of an additional participant is removed from the conference details.

The conference participant is no longer connected to the conference.

4.10.34.10 How to Extend a Conference by a Web Collaboration Session

An active conference is displayed by a call control bar. Using the controls of this call control bar you can start an additional Web Collaboration session for conference participants to join.

Prerequisites

You are connected to a conference.

Initiating a Web Collaboration session with persons who do not use UC-Application requires known e-mail addresses of such users– for example in the form of entries in your private contacts.

Step by Step

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

The Web Collaboration session starts and the icon changes to .

2) Select [icon] to join the Web Collaboration session.

The participant module for OpenScape Web Collaboration is being downloaded. The downloaded file is displayed to you in your browser under the downloads.

3) Start the participant module.

The Web Collaboration window opens.

NOTICE:

How to control the Web Collaboration session is described in the *OpenScape Web Collaboration, User Guide*.

4.10.34.11 How to Terminate a Conference

An active conference is displayed by a call control bar. Using the controls of this call control bar you can terminate the conference for all participants.

Prerequisites

You are connected to a conference.

You must be a moderator of the conference to terminate a moderated conference.

Step by Step

1) Select [icon] in the call control bar of the conference connection.

The action menu opens.

2) Select under **Moderator options** the **End conference** option.

The conference is terminated. The connections to all dialed-in participants are closed.

4.10.34.12 How to Record a Web and Audio Conference simultaneously

An active conference is displayed by a call control bar. A web collaboration session has been initiated.

Prerequisites

You are connected to a conference.

You must be a moderator of the conference to record the conference session (audio and video if available + the web collaboration session).

Step by Step

1) Click on one of the **Record** options:

- With participant video
- Without participant video

The REC box appears on top of the side bar. The conference and web collaboration session is being recorded.

2) Click on the **Record** button again to pause the recording.

3) You can click on the **Record** button again in order to select further actions, such as:

- Restarting the recording,
- Starting a new recording.

After the conference termination, you receive an E-Mail including the recording link along with the date it becomes invalid.

NOTICE:

You must add the back-end FQDN to the hosts file of your computer in order to be able to download the recording file after clicking the E-mail recording URL.

NOTICE:

Up to four video sending parties should be shown directly in the active speaker recording layout (which is 1 large content + 4 small tiles on the right).

With more than 5 sending parties the active speaker tile should be on top right and the remaining is filled in the order of entering /starting video sending.

For filling the small tiles below the active speaker the moderators should have preference over users so that there is a sort of small discussion panel of moderators which is always visible in the video.

- Grace periods (greyed out tile) in case of temporary disconnect

- Grace period (greyed out tile) in case of a person is no longer sending a video (if applicable)

- Showing one person in both his / her tile and the active speaker tile to avoid rearrangements

---

4.11 Voicemail

If you use OpenScape Xpressions as external voicemail system at OpenScape UCApplication, you can manage all voicemails available for you in OpenScape Xpressions.

The content area shows the following information about voicemails:

- Date and time of their arrival

- Duration of the voicemail
- Information about the caller where available
- Voicemail status (new, played)

4.11.1 How to Display your Voicemails

You can display your voicemails list in the content area.

Step by Step

Select 6 in the navigation bar.

Your voicemails list is displayed in the content area.

If there are new voicemails you have not viewed yet, the number of these voicemails is displayed in a green square within the voicemail tab.

4.11.2 How to Play a Voicemail

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

Prerequisites

Your voicemails list is displayed in the content area.

Step by Step

1) How to play a voicemail on your preferred device:

a) Move the mouse pointer onto the voicemail entry.

You see additional controls.

b) Select .

The action menue opens.

c) Select **Play on phone**.

Your preferred device rings.

d) Accept the call.

NOTICE:

If the Auto-Answer feature is enabled for your preferred device, speaker and microphone of the terminal device or a connected headset become active automatically.

The voicemail playback starts.

2) How to play the voicemail via your PC:

a) Select for the voicemail entry.

The voicemail playback starts. The progress display and its position indicator show where in the voicemail you currently are.

b) If you wish to skip to a particular point in the voicemail, move the position indicator in the progress display with the mouse.

You have played a voicemail.

4.11.3 How to Store a Voicemail on your PC

You can download a voicemail from the voicemail system and store it locally on your PC.

Prerequisites

If you use Microsoft Internet Explorer, the following setting is active: **Security** > **Custom level...** > **Downloads** > **File download** > **Enable**. This is the case by default.

If you connect to the client via HTTPS and use Microsoft Internet Explorer, the following setting is active: **Advanced** > **Security** > **Do not save encrypted pages to disk**. This is no default for Microsoft Internet Explorer V9.

Your voicemails list is displayed in the content area.

Step by Step

1) Move the mouse pointer onto the voicemail entry.

You see additional controls.

2) Select .

The action menu opens.

3) Select **Download**.

The voicemail is loaded on the PC as sound file.

4) Store the file locally on your PC.

You have downloaded a voicemail on your PC.

4.11.4 How to Initiate a Call from a Voicemail Entry

You can initiate a call from a voicemail entry with a mouse click. In this case the callee is the voicemail's originator.

Prerequisites

Your voicemails list is displayed in the content area.

Step by Step

1) Move the mouse pointer onto the voicemail entry.

You see additional controls.

2) Select if you wish to call the voicemail's originator under his/her main phone number.

If only a single number is given for a caller or callee, it is automatically his/her main phone number. If several phone numbers have been specified for a caller or callee, the number under **Work** is the main phone number.

NOTICE:

If the voicemail's originator is defined by a phone number only, the relevant phone number is called.

Your preferred device rings.

3) How to select the phone number for calling the voicemail's originator:

NOTICE:

This option is unavailable if the voicemail's originator is unknown and defined by a phone number only.

---

a) Select .

You see the phone numbers and addresses under which the voicemail's originator can be reached.

b) Select a phone number for calling the voicemail's originator.

Your preferred device rings.

4) Accept a call.

NOTICE:

If the Auto-Answer feature is enabled for your preferred device, speaker and microphone of the terminal device or a connected headset become active automatically.

The connection to the voicemail's originator is being established.

A contextual action bar opens, displaying the new connection.

You have initiated a call from the voicemail entry.

4.11.5 How to Send an E-Mail via a Voicemail Entry

You can send an e-mail from a voicemail entry to the voicemail's originator by mouse click.

Prerequisites

Your voicemails list is displayed in the content area.

You know an e-mail address of the voicemail's originator– for example as associated entry in your private contacts.

Step by Step

1) Move the mouse pointer onto the voicemail entry.

You see additional controls.

2) Select .

You see the phone numbers and addresses under which the voicemail's originator can be reached.

3) Select the entry of the e-mail address.

Your e-mail application opens the window for a new e-mail. In this e-mail you find the recipient's e-mail address already specified.

4) Write and send the e-mail message in your e-mail application as usual.

You have sent an e-mail via a voicemail entry.

4.11.6 How to Start a Chat from a Voicemail Entry

You can start a chat from a voicemail entry with the voicemail's originator by mouse click.

Prerequisites

Your voicemails list is displayed in the content area.

You know an Instant-Messaging address of the voicemail's originator– for example as associated entry in your private contacts.

Step by Step

1) Move the mouse pointer onto the voicemail entry.

You see additional controls.

2) Select .

You see the phone numbers and addresses under which the voicemail's originator can be reached.

3) Select **Chat**.

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

4.11.7 How to Initiate a Web Collaboration Session via a Voicemail Entry

You can start a Web Collaboration session from a voicemail entry with the voicemail's originator by mouse click.

Prerequisites

Your voicemails list is displayed in the content area.

Initiating a Web Collaboration session with a person who does not use UC-Application requires a known e-mail address of this user– for example in the form of an entry in your private contacts.

Step by Step

1) Move the mouse pointer onto the voicemail entry.

You see additional controls.

2) Select .

You see the phone numbers and addresses under which the voicemail's originator can be reached.

3) Select **Start Web Collaboration**.

A signaling bar indicates a freshly started Web Collaboration session.

4) Select in the signaling bar.

The participant module for OpenScape Web Collaboration is being downloaded. The downloaded file is displayed to you in your browser under the downloads.

5) Start the participant module.

The Web Collaboration window opens.

4.11.8 How to Delete a Voicemail

You can delete single voicemails from your voicemails list and thus also from the voicemail system.

Prerequisites

Your voicemails list is displayed in the content area.

Step by Step

1) Move the mouse pointer onto the voicemail entry.

You see additional controls.

IMPORTANT:

The following step deletes the voicemail irretrievably from the voicemail system.

2) Select .

You have deleted the voicemail.

4.11.9 How to Delete all of your Voicemails

You can delete all voicemails from your voicemails list and thus also from the voicemail system with a mouse click.

Prerequisites

Your voicemails list is displayed in the content area.

Step by Step

1) Select **Clear all**.

> **IMPORTANT:**
>
> The following step deletes all of your voicemails irretrievably from the voicemail system:

2) Confirm the security prompt.

You have deleted all voicemails.

4.11.10 How to Configure your Voicemail Settings

If you use OpenScape Xpressions as external voicemail system at OpenScape UCApplication, you can open the associated Web Assistant via the client. In the assistant you can configure your voicemail settings.

> **NOTICE:**
>
> How to operate the Web Assistant is described in the *OpenScape Xpressions, Web Assistant, User Guide* manual.

Step by Step

1) Click on your login name in the header bar.

The settings menu opens.

2) Select **Settings**.

3) Click **Configure your voice mail here** under **Voice mail configuration**.

The Web Assistant's user interface is displayed.

> **NOTICE:**
>
> If you use OpenScape Xpressions version V7R1 FR3 or older, your browser will display the Web Assistant’s login dialog. Use your login data for OpenScape Xpressions to log on.

Next steps

Configure your voicemail settings as described in the *OpenScape Xpressions, Web Assistant, User Guide* manual.

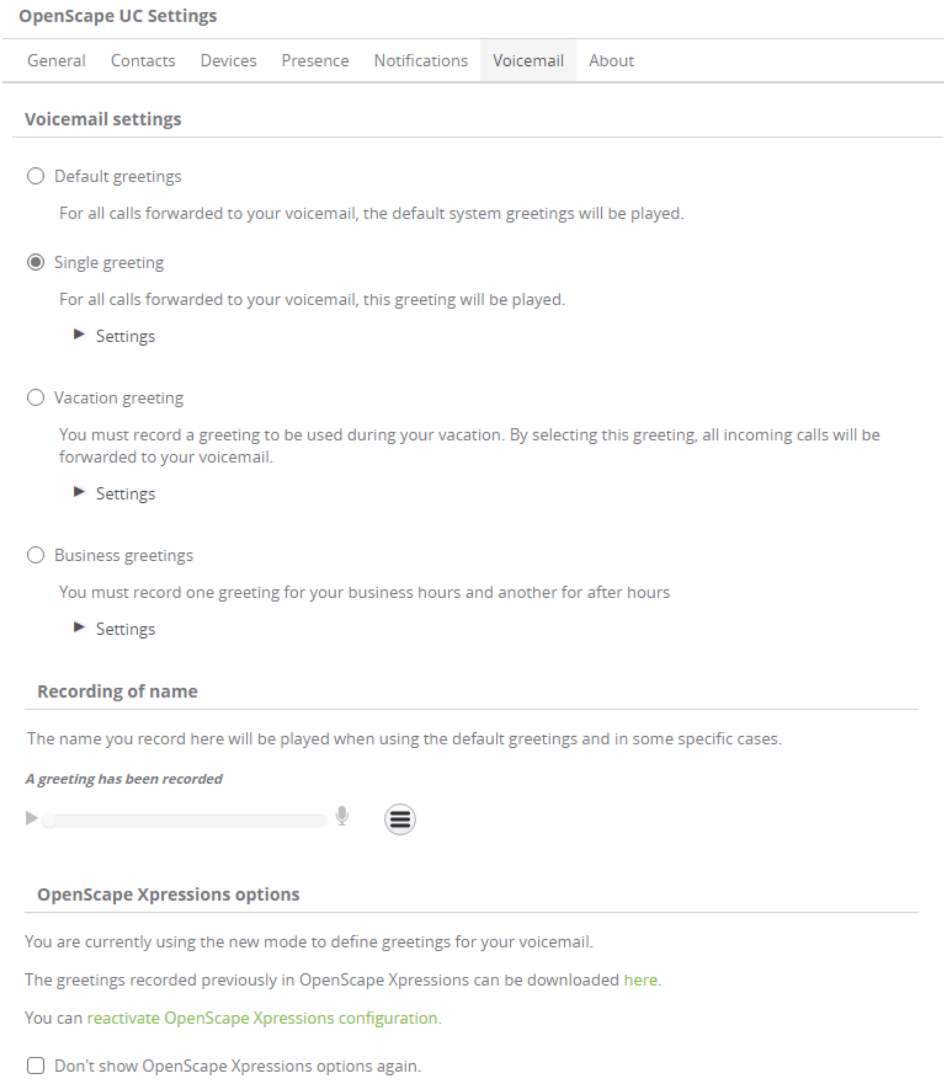
4.12 New Voice mail Greeting Feature

A new Voicemail greeting interface has been introduced in OpenScape UC V10 WebClient and Fusion for Office V2 which enables users to configure the way that they have access to their VM greetings.

The UC users have the option to either use the new greetings mode or not depending on their individual configuration.

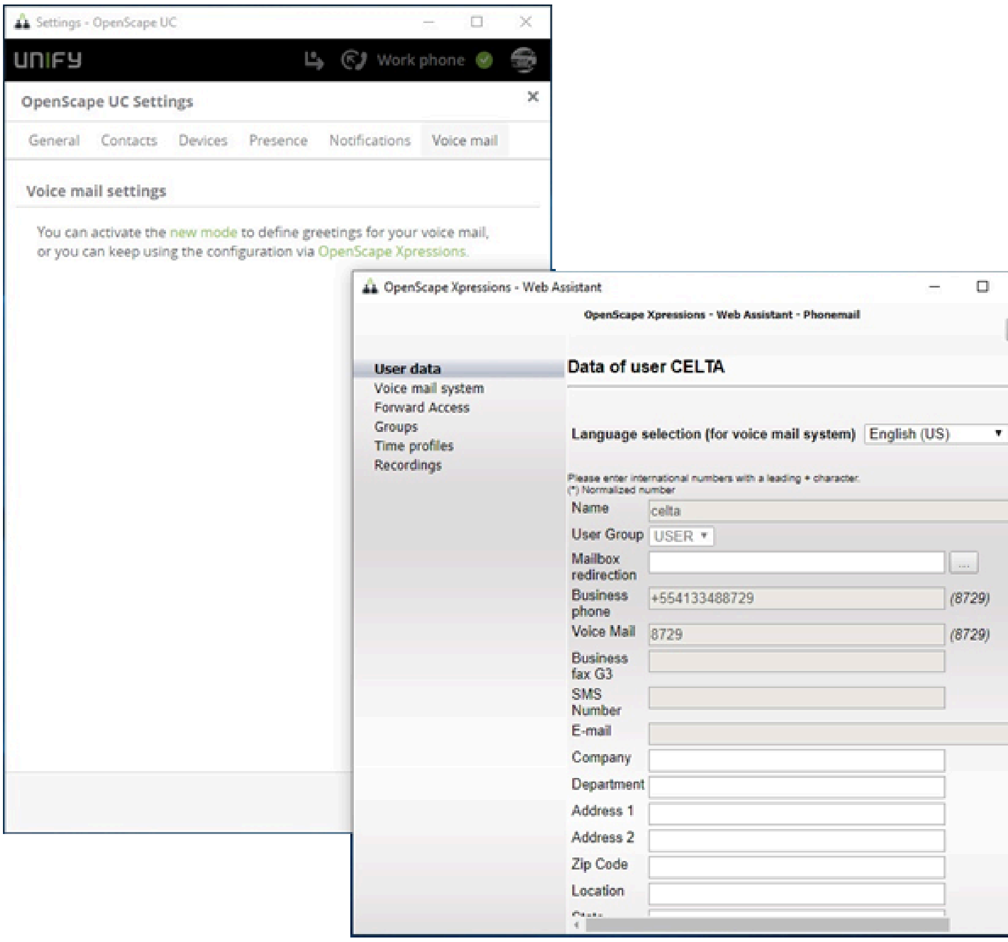
A user can either:

- Set a more user friendly interface for the settings of voicemail greetings
- Choose to have voicemail settings with advanced configurations as show in the figure below:



- Choose Xpressions mode or use the UC mode

  The new voicemail interface in Xpressions mode is shown in the figure below:



4.12.1 OpenScape Xpressions Voice mail integration

4.12.1.1 With OpenScape Xpressions Voice mail integration

If you already have OpenScape Xpressions Voice mail integration and don't want to migrate to the new Greetings mode, there is a minor change in the user interface. However, the OpenScape Xpressions Web Assistant link is still available to configure your voice mail:

To configure your voice mail settings:

In OpenScape UC, navigate to **Settings** > **Voice mail** new tab and click on **Configure your voice mail here**.

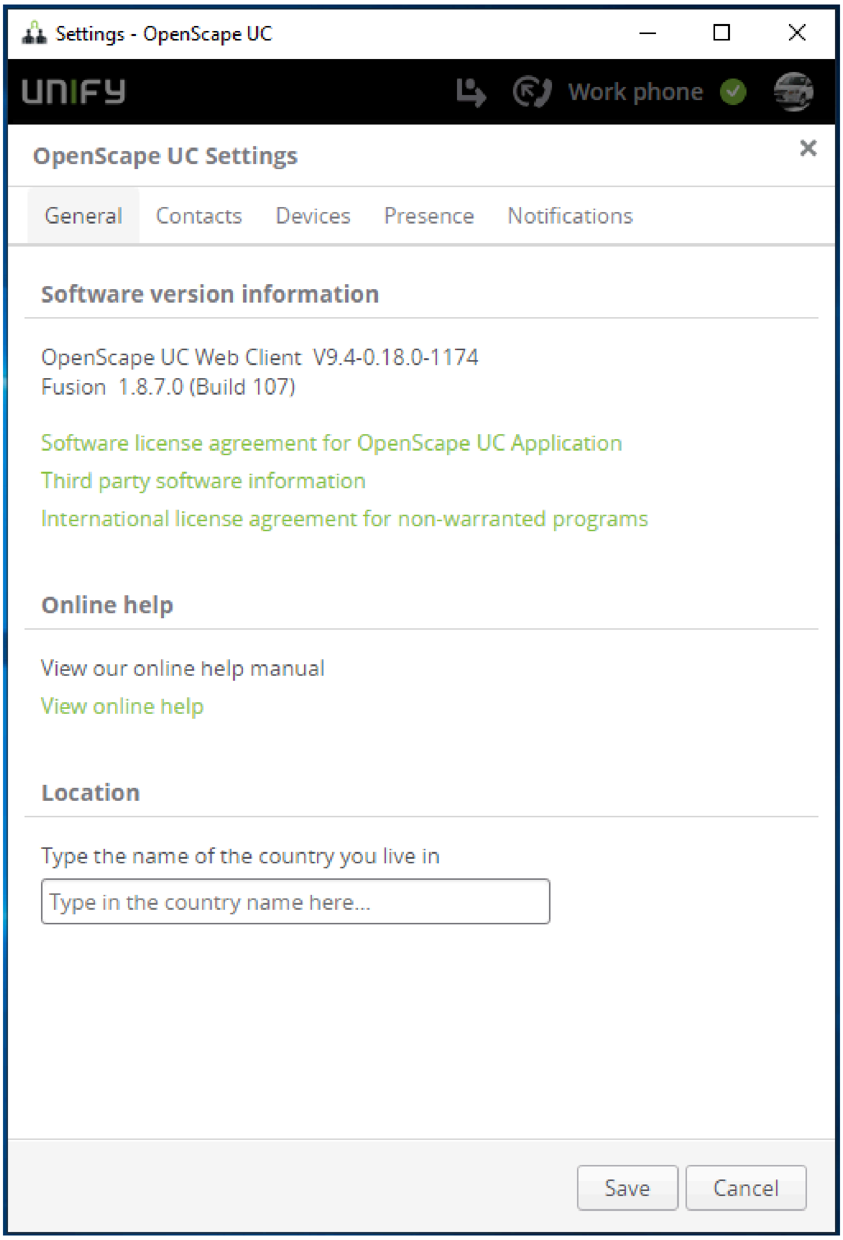
In OpenScape Xpressions, navigate to **OpenScape Xpressions** > **Web Assistant** > **Phonemail**.

4.12.1.2 Without OpenScape Xpressions Voice mail integration

If you do not have OpenScape Xpressions Voice mail integrations or the Voice mail mailbox, the **Voice mail** tab will not be displayed:

NOTICE:

In addition, there is no **Voice mail** tab in the Web Assistant link.



4.13 UC Voice mail modes

Change to new Greetings mode

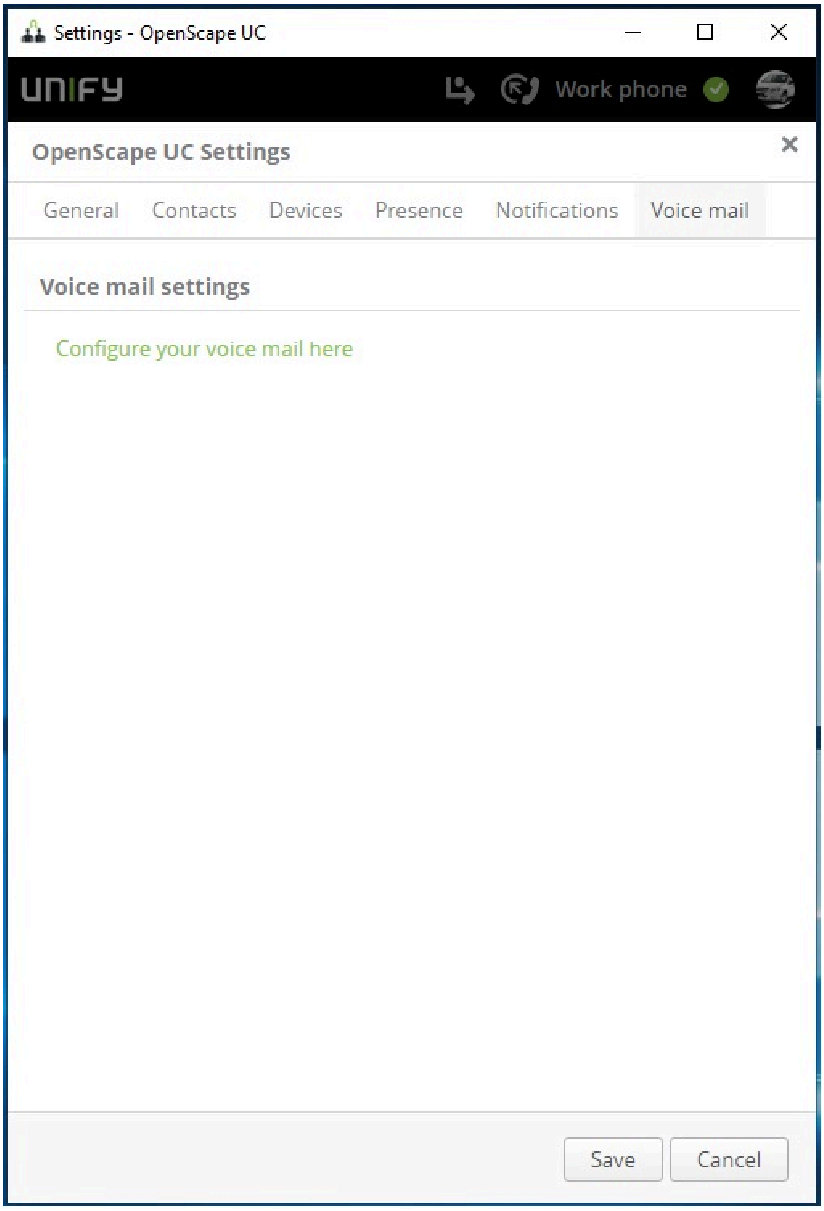
You can change the greeting mode by either selecting and using the advanced OpenScape Xpressions mode or trying a simpler way to configure the voice mail greetings. In **Settings** > **Voice mail** tab:

- Click on **OpenScape Xpressions** link to configure your voice mail settings via the OpenScape Xpressions Web Assistant.
- Click on the **new mode** link to access the new greetings interface.

4.13.1 Default Mode

The Default mode can be access via the the OpenScape Xpressions Web Assistant by selecting **Configure your voice mail here**.

You can change your VM Greeting mode in OpenScape UC WebClient via the **Settings** > **Voice mail** tab.



4.13.2 New Greetings mode

Once you select the new mode link from the **Voice mail** tab mode you will be prompted with a warning message to confirm the procedure. Select **Yes, activate the new mode** to access the new greetings interface.

In this new greetings interface, you can see the following sections and select the greetings configuration options.

- **Voicemail settings**

  In this section you can select on of the following radio buttons:

  – **Default greetings** - This is the Xpressions default greeting, that is, the initial setting that will be checked by default for all users.
  – **Single greeting** - This option applies to users that want to use only one greeting all the time.
  – **Vacation greeting** - This option will also set one special greeting to be used during a user's vacations. In addition, this option will automatically set calls to be forwarded to voicemail.
  – **Business greetings -** This option applies to users that want to have two different greetings: one for business periods and one for non-business periods.
- **Recording of name**

  Record or upload the name that will be plated in your default greetings options or other specific cases.
- **OpenScape Xpressions options**

  In this section you can configure settings related to the OpenScaoe Xpressions integration

  – You can access and download a backup of previously recorded greetings by clicking the download **here** link.
  – You have also the option to **reactivate the OpenScape Xpressions Configuration**
  – Or mark the **Don't show OpenScape Xpressions option again** checkbox to stop displaying your older Xpressions options.

NOTICE:

Only the personal greetings are backed up. System administrator greetings will not be in the backup files.

4.13.3 How to Reactivate the OpenScape Xpressions Configuration

If you decide to reactivate the OpenScape Xpressions configuration, a warning message is displayed which informs you that all greetings and configurations done using the new mode will be lost in order to restore user old configuration of OpenScape Xpressions Web Assistant.

Select **Yes, restore OpenScape Xpressions** if you wish to return to the previous configuration. This will replace the new greetings mode with the previous default one and restore your previous voice mail settings.

NOTICE:

You will still be able to switch back to the the new mode by clicking in the **new mode** link.

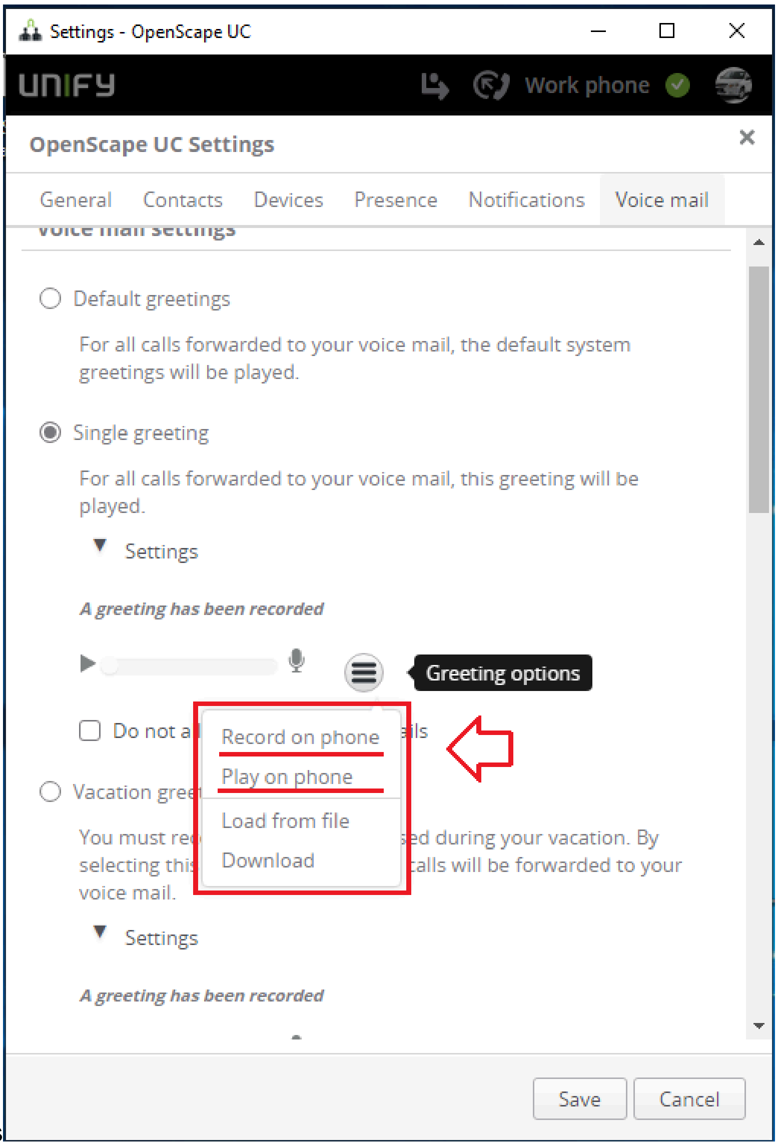
4.13.4 How to Record and Play on Phone

Record on Phone and Play on Phone options are available in the **Voice mail** tab via the Greeting options menu:

Step by Step

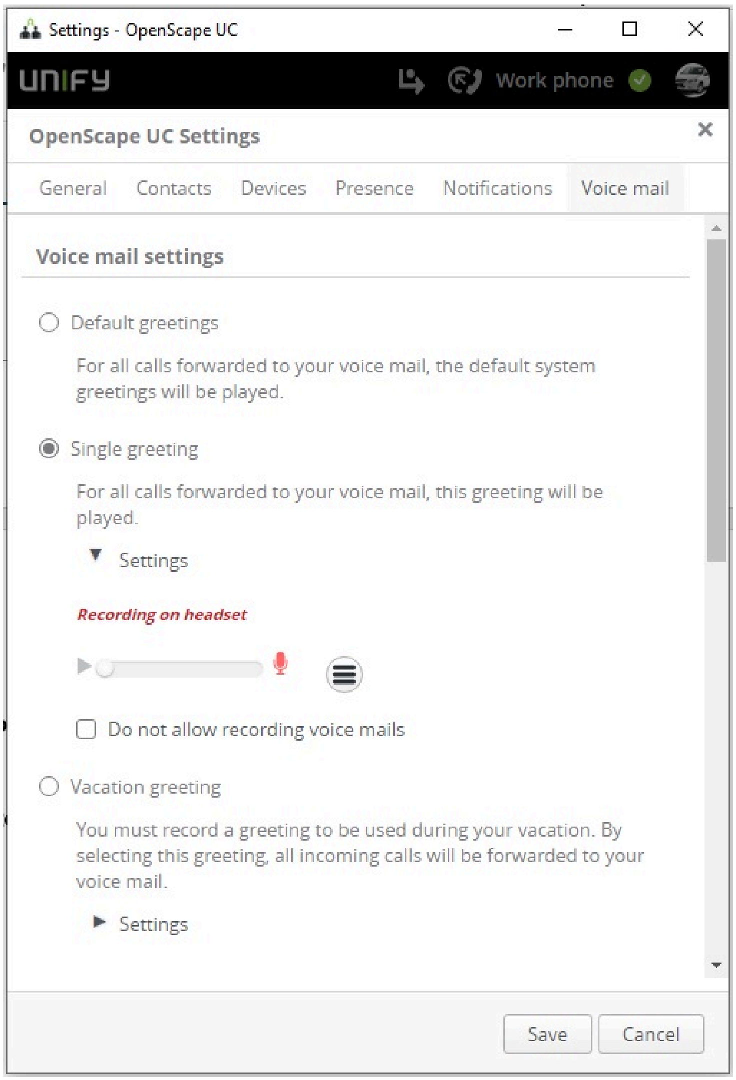
1) Navigate to **Settings** > **Voice mail** tab.

2) Click on the button to open additional Greeting options



3) Click **Record on phone** to record a greeting or click on **Play on phone** to hear an existing audio. It is also possible to record by clicking on the microphone icon.

WhIle recording a greeting on the phone, the text **Recording on phone** will appear n red color until the recording is completed. If you are recording via a headset, similarly a **Recording on headset** will appear in red color.



Just after you finish recording yout greeting, a new indication **new greeting has been recorded** will appear in green color.

4) Click **Save** to save your new greeting.

After clicking on **Save**, the indication **A greeting has been recorded** will appear in dark grey color. You can listen to your recording by clicking the play

 icon.

If there is no greeting available to play or download, the indication **No greeting has been recorded** will appear in light grey color.

NOTICE:

The previously available options **Play on the headset/Play on phone** and **Download** will be disabled.

4.13.5 How to Upload and Donwload Greetings

Upload and donwload greetings options are available in the **Voice mail** tab via the Greeting options menu:

Step by Step

1) Navigate to **Settings** > **Voice mail** tab.

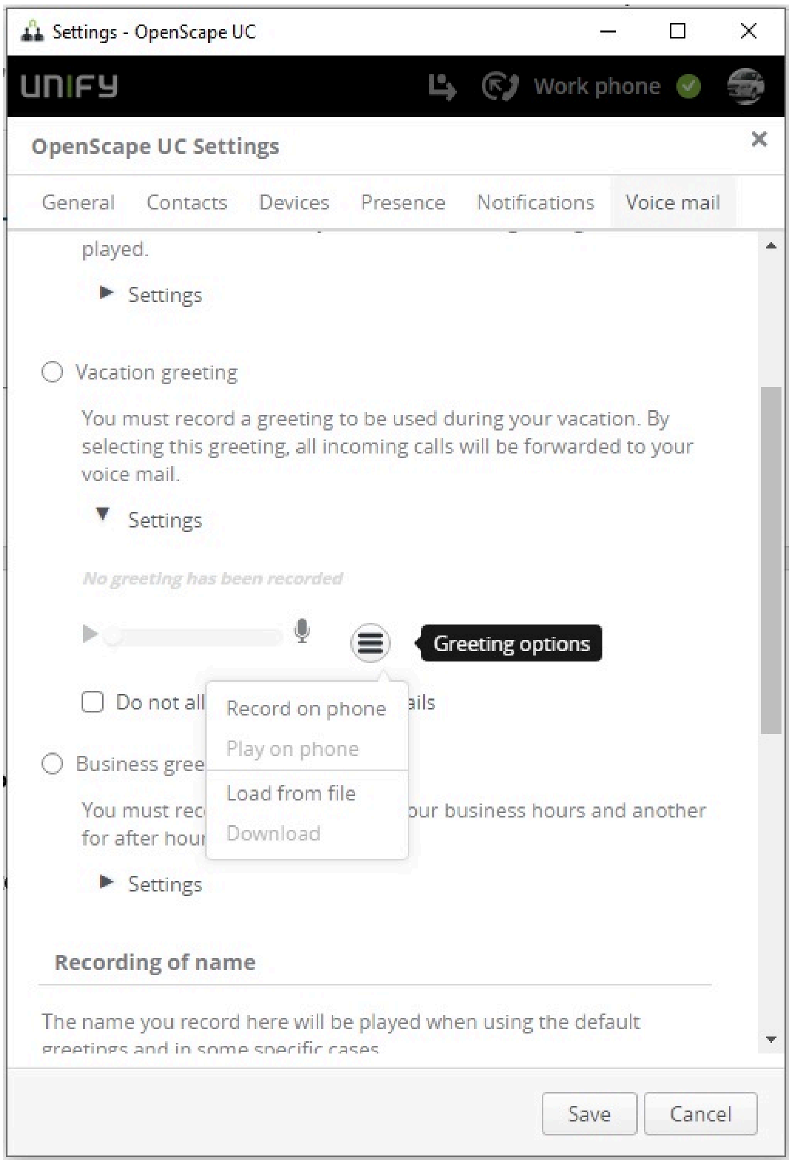
2) Click on the  button to open additional Greeting options

3) Click **Upload from file** to upload an audio file or click Download to download an existing audio greeting file.

> **IMPORTANT:**
>
> Only **.wav** files are supported. The greeting file will also be downlaoded as a **.wav** file.

> **NOTICE:**
>
> Max. greeting length is 1 minute.

4) If you have uploaded an new audio file, click **Save** to save your new greeting.



4.13.6 How to Do not allow recording of voice mails

This option only applies for Single, Vacation and Business Greetings. By enabling this option you do not allow the recording of any voice mails.

Prerequisites

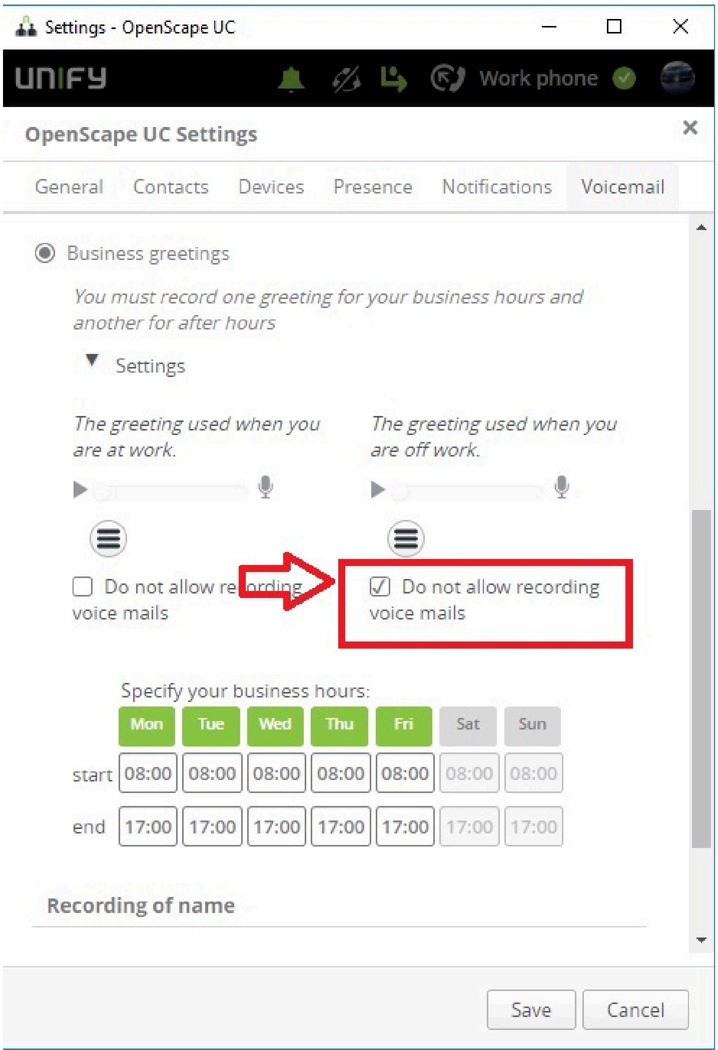
You have activated **Single**, **Vacation** or **Business** Greetings,

Step by Step

1) In the main OpenScape UC client interface navigate to **Settings** > **Voicemail**
2) In the Voicemail Settings section under your selected greetings option, check the **Do not allow recording voice mails** box.

NOTICE:

You will get a prompt message: *"This extension is not accepting messages"*



4.13.7 How to Set Automatic Call Forward to Voice mail (only for Vacation greeting)

You can set an automatic call forwarding to your voicemail when Vacation greeting is activated. This option does not apply for another greeting selection.

Prerequisites

You have activated **Vacation greeting** option.

Step by Step

1) In the main OpenScape UC client interface click on the  call forwarding icon

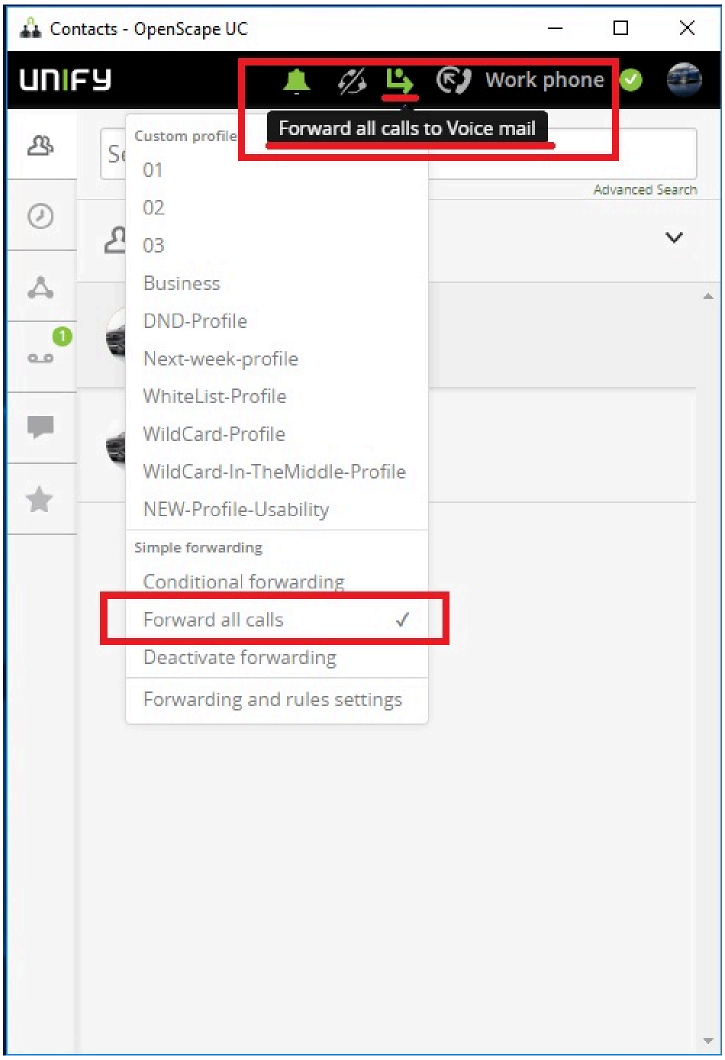
2) Select **Forward all calls** from the call forwarding options list.

IMPORTANT:

This automatic call forward to voicemail will not be set if any previous call forward or rule is active.

NOTICE:

To activate the call forward to voicemail again, the user should manually deactivate the previous call forward or rule first, then select another greeting (e.g. default greeting) and save; return to the Vacation greeting and save it again.



4.13.8 How to Set Business Greeting Time Profiles (only for Business greetings)

For Business Greeting setting, you have the option to use different greetings for working hours and after hours. You can select your weekdays and can specify your business hours for each day. The time profile can be configured in the new interface as following:

Prerequisites

You have activated **Business** Greetings,

Step by Step

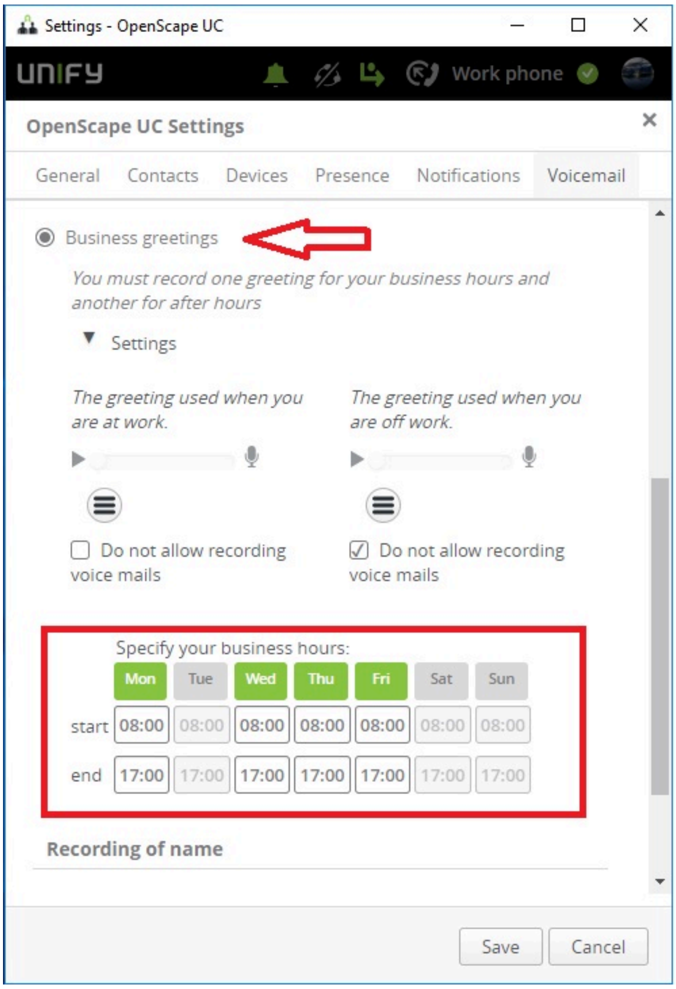
1) In the main OpenScape UC client interface navigate to **Settings** > **Voicemail**

2) In the Voicemail Settings section under **Business greetings** option:

a) Select your business days. under the **Specify your business hours** section.

b) Change manually the **start** and **end** hours for your selected business days.

3) Click **Save** to apply your changes.

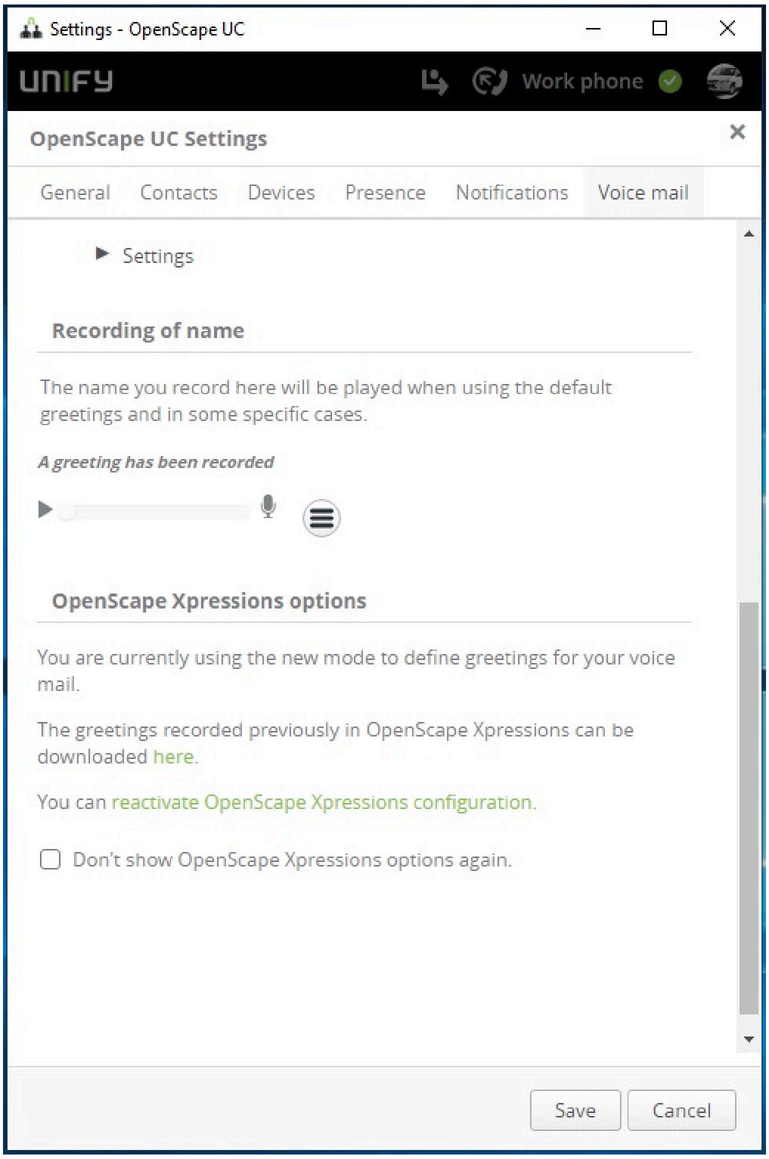


4.13.9 How to Not show OpenScape Xpressions option again

If you decide to continue in the new mode then mark option **Don't show OpenScape Xpressions option again** and press the **Save** button. OpenScape Xpressions reactivation option and the backup of greeting download will not be displayed to the user again.

IMPORTANT:

Only an Xpressions System Administrator can reactivate the OpenScape Xpressions option again.



4.14 Team Feature

Using the OpenScape UCApplication team feature you can group OpenScape users to teams. You can create and update teams, invite contacts to the team, remove team members, grant or revoke administrator permissions from other team members.

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

4.14.1 How to Accept a Call for a Team Member

You can accept calls for other users of your team. Calls coming in for members of your team are indicated by a signaling bar that contains the text **ringing at <user name >**.

Prerequisites

You are assigned to the same team as the user for whom the call comes in.

Step by Step

Select in the signaling bar.

If the **Auto-Answer** feature is enabled for your preferred device, speaker and microphone of the terminal device or a connected headset become active automatically.

A call control bar opens, displaying the new connection.

4.14.2 How to Create a Team

You can create teams and invite contacts to be members of this team.

Step by Step

1) Click in the contacts area.
2) Select **Create new Team**.
3) Enter a name for the new team in the **Team name** field.
4) Enter the contact's name or number in the search field and click **Search Directory for** to find the contact in the directory.
5) Select the contact from the retrieved list.
6) Click **Save**.
7) Perform steps 4-6 for all contacts that should be added as team members. The contact you invited is displayed under **Invited users** and will receive your invitation in the contacts area of the OpenScape Web Client. You will be notified when the contact accepts your invitation. The contact will then appear under the **Members** list.

4.14.3 How to Edit a Team

You can update the details of a team, i.e. edit the team name, invite additional contacts, or remove members, if applicable.

Prerequisites

You have created this team, or

You have been granted with administrator permissions for this team.

Step by Step

1) Navigate to your contacts area.

2) Click on the Communication options icon inext to the corresponding team and select **Edit Team**.

3) Edit the team name.

4) Invite contacts to the team if applicable, by entering the contact’s name or number and clicking **Search Directory for** to find the contact in the directory.

5) Remove team members if applicable, by moving your mouse over the member that should be deleted and clicking the delete icon .

6) Click **Save**.

The team has been edited.

4.14.4 How to Delete a Team

You can delete a team that you have previously created.

Prerequisites

You have created this team, or

You have been granted with administrator permissions for this team.

Step by Step

1) Navigate to your contacts area.

2) Click on the Communication options icon next to the corresponding team and select **Edit Team**.

3) Click on the Delete icon next to the team name.

4) Click **Delete**.

The team has been deleted.

4.14.5 How to Leave a Team

You can leave a team that you previously accepted to join.

Prerequisites

You are a member of this team.

Step by Step

1) Navigate to your contacts area.

2) Click on the Communication options icon next to the corresponding team and select **Leave Team**.

3) Click **Yes**.

You have left the team. You can join again in case you are re-invited by the team administrator.

4.14.6 How to Invite Members to a Team

You can invite contacts from the directory to be members of a team you are managing.

Prerequisites

You have created this team, or

You have been granted with administrator permissions for this team.

Step by Step

1) Navigate to your contacts area.

2) Click on the Communication options icon next to the corresponding team and select **Edit Team**.

3) Enter the contact's name or number in the search field and click **Search Directory for** to find the contact in the directory.

4) Select the contact from the retrieved list.

5) Click **Save**.
The contact you invited is displayed under **Invited users**. The contact will receive your invitation in the contacts area of the Opencape Web Client. If the contact clicks **Accept**, you will be notified that the contact has accepted your invitation. The contact will then appear under the **Members** list. If the contact clicks **Decline**, you will be notified that the contact has rejected your invitation.

4.14.7 How to Grant Administrator Permissions to other Team Members

You can grant administrator permissions to other team members.

Prerequisites

You have created a team, or

You have been granted with administrator permissions for this team.

Step by Step

1) Navigate to your contacts area.

2) Click on the Communication options icon next to the corresponding team and select **Edit Team**.

3) Under **Members**, select **Administrator** from the drop-down list next to the corresponding member.

4) Click **Save**.
The selected team member has now administrator permissions.

4.14.8 How to Revoke Administrator Permissions from other Team Members

You can revoke administrator permissions from a team administrator as long as you also have administrator permissions for this team.

Prerequisites

You have created this team, or

You have been granted with administrator permissions for this team.

The corresponding team member has administrator permissions.

Step by Step

1) Navigate to your contacts area.

2) Click on the Communication options icon next to the corresponding team and select **Edit Team**.

3) Under **Members**, select **Member** from the drop-down list next to the corresponding member.

4) Click **Save**.
The team member has been deprived of administrator permissions.

4.14.9 How to Remove a Team Member

You can remove members from a team, as long as you have administrator permissions.

Prerequisites

You have created this team, or

You have been granted with administrator permissions for this team.

Step by Step

1) Navigate to your contacts area.

2) Click on the Communication options icon next to the corresponding team and select **Edit Team**.

3) Under **Members**, move your mouse over the team member you need to remove.
4) Click the remove icon .
5) Click **Save**.
The team member has been removed.

4.15 How to Accept a Group 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).

4.16 How to Use Multi Line Hunt Groups

This feature is available when using WebRTC as your primary work phone (ONS).

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

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

Client connected to OpenScape Voice, supports:

- Stop at me / Resume
- Login / Logoff

NOTICE:

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

Feature activated / deactivated	MLHG busy state	UC client meaning	Led on physical device	UC client UI
Activated	Busy	Logged off	ON	

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

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

Client connected to OpenScape 4000, supports:

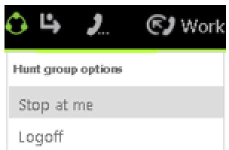
- Login / Logoff

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

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

Options when available

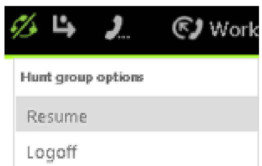
When you are logged into the hunt group and you are available you have the following options by clicking on the icon :



- Stop at me (OpenScape Voice)
- Logoff

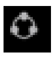
Options when status is available but set to busy

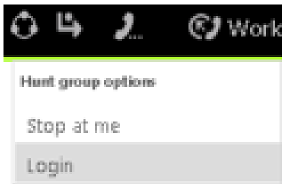
When you are logged into the hunt group and you are available but set to busy you have the following options by clicking on the icon :



- Resume (OpenScape Voice)
- Logoff

Options when status is logged off

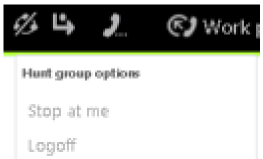
When you are not logged into the hunt group you have the following options by clicking on :



- Stop at me (OpenScape Voice)
- Login

Options when status is no manual changes allowed

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



- Stop at me (OpenScape Voice)
- Logoff

4.17 Chat (Instant Messaging)

Using the client you can chat with other users.

The following chapters describe in detail how to use general call control, contacts and external directory, conferencing, voicemails and the call history to start a chat.

4.17.1 Chat

The chat history is kept for two weeks by default but you can change this default setting according to your preferences.

A chat history may contain the following information in particular:

- the avatar
- the message
- time and date

IMPORTANT:

Chat history in a networking/federated scenario is not supported.

4.17.1.1 How to display your Chat History

You can display your chat history in the content area.

Step by Step

Select the in the navigation bar.

Your chat history is displayed in the content area.

4.17.1.1.1 Using communication options

When you have opened the chat-history, you can hover with the mouse over the chat and use the communication options. (Symbol)

With the communication options you can:

- Recreate the chat
- Call a chat-partner
- Send a mail
- Start a Web conference
- Add more participants to a chat, i.e. group chat
- Leave a group chat

For more details regarding the aforementioned, please refer to the chapter Instant Messaging.

4.17.1.2 How to Add Users to a Chat

You can add further participants to an active chat.

Prerequisites

You are conducting a chat.

Instant-messaging addresses are available for the additional chat participants– for example as associated entries in your private contacts.

Your private contacts' IM status is **Available**.

Step by Step

1) Select in the title bar of the chat window.

   You see an action menu.

2) Select **Add user**.

   The dialog for selecting users opens.

3) How to add a user from your private contact list:

a) Enter one of the following search items in the search field of the contact area:

– Full second name or part of a second name

– Full first name or part of a first name

– Full phone number or part of a phone number

If your private contacts deliver search hits, they are displayed beneath the search field, continuously updated.

b) Move the mouse pointer onto the private contact.

You see additional controls.

c) Select +.

The contact is displayed in the contextual action bar.

4) How to add a user from the directory:

a) Enter one of the following search items in the search field of the window:

– Full second name or part of a second name

– Full first name or part of a first name

– Full phone number or part of a phone number

If your private contacts deliver search hits, they are displayed beneath the search field, continuously updated.

b) Select beneath the search field and the private hit list.

The contact is searched for in the directory.

If search hits are found, they are displayed beneath the search field.

c) Move the mouse pointer onto the contact.

You see additional controls.

d) Select +.

The contact is displayed in the contextual action bar.

5) Select **Done**.

The additional users may now also post messages in the chat.

4.17.1.3 How to Call Chat Participants

You can call a chat participant from an active chat. If more than two participants conduct a chat, a conference with all participants is created.

Prerequisites

You are conducting a chat.

You know a phone number of the chat participant– for example as associated entry in your private contacts.

Step by Step

1) Select in the title bar of the chat window.

   You see an action menu.

2) Select **Call**.

   A signaling bar displays the connection setup.

   Your preferred device rings.

3) How to accept a call:

   NOTICE:

   If the **Auto-Answer** feature is enabled for your preferred device, speaker and microphone of the terminal device or a connected headset become active automatically.

   - If you wish to use the terminal device's receiver for the call, just pick it up to accept the call.
   - If you wish to use speaker and microphone of the terminal device or a connected headset to accept the call, select in the signaling bar.

     Speaker and microphone of the terminal device or of a connected headset become active.

   A call control bar opens, displaying the new connection.

You have called the chat participants.

4.17.1.4 How to Initiate a Web Collaboration Session with Chat Participants

You can initiate a Web Collaboration session with chat participants from an active chat.

Prerequisites

You are conducting a chat.

Initiating a Web Collaboration session with persons who do not use UC-Application requires known e-mail addresses of such users– for example in the form of entries in your private contacts.

Step by Step

1) Select in the title bar of the chat window.

   You see an action menu.

2) Select **Start Web Collaboration**.

   A signaling bar indicates a freshly started Web Collaboration session.

3) Select in the signaling bar.

   The participant module for OpenScape Web Collaboration is being downloaded. The downloaded file is displayed to you in your browser under the downloads.

4) Start the participant module.

The Web Collaboration window opens.

NOTICE:

How to control the Web Collaboration session is described in the *OpenScape Web Collaboration, User Guide*.

4.17.1.5 How to Leave a Chat

You can leave from an active group chat. This chat will be removed from your **Chat history** tab.

Prerequisites

You are conducting a chat with three or more participants.

Step by Step

1) Select in the title bar of the chat window.

   You see an action menu.

2) Select **Leave chat**.

You have successfully left the group chat. The other participants will be able to see that you left the chat by a short message in the chat's window.

NOTICE:

Once you leave a chat you wont be able to see the chat's history. You can only access the certain chat history if one of the participants adds you again.

4.17.1.6 How to Close a Chat

You can close a chat window, thus bringing your participation in the chat to an end.

Prerequisites

You are conducting a chat.

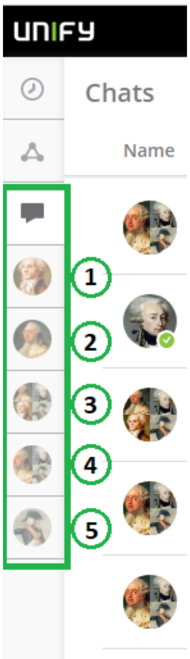
Step by Step

Select in the top right corner of the chat window.

The chat window closes.

4.17.1.7 How to Pin a Chat Conversation

You can pin one or more chat conversations in order to easily access them from the Navigation tab on the left corner of your WebClient interface. The pinned chats will be displayed below the chat tab and user is allowed to pin 5 chat



conversations.

Prerequisites

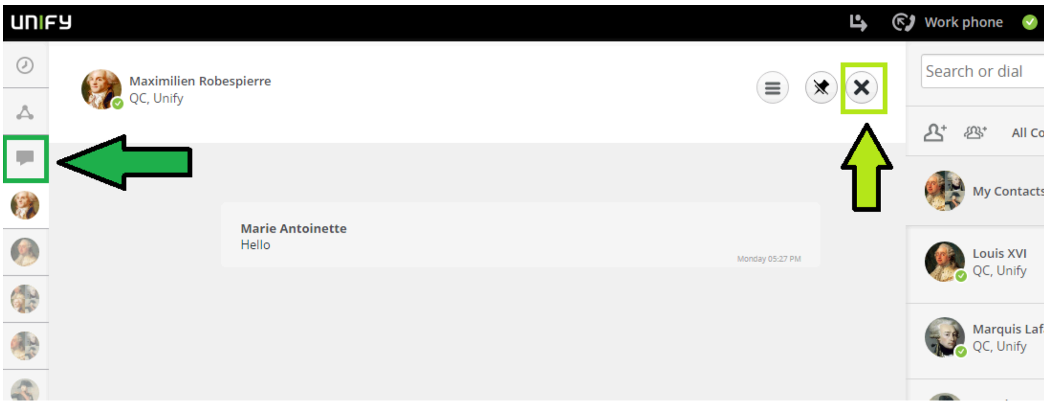
Have an open chat conversation in the WebClient interface

Step by Step

In the main window of the chat conversation, click the pin button , This will pin the specific conversation to the left Navigation bar as shown in the figure above.

- To unpin a conversation, select it and click the unpin button 

You can return to the chatlist by clicking the "X" button as shown in the figure below.



4.17.2 Chat Attachments

OpenScape Web Client (UC V10) supports the attachments into chat conversations, i.e. allows users to send files attached to the chat messages.

Sharing is enabled by default for the most common file types. However, If you want to change the default whitelist of file types that are supported please contact your system administrator or refer to the OpenScape UC V10, Configuration and Administration Guide. Some of the file types that are supported are the following:

- PDF (.pdf)
- PNG (.png)
- JPEG (.jpeg)
- GIF (.gif)
- BMP (.bmp)
- Text (.txt)
- CSV (.csv)
- ZIP (.zip, .7zip)
- Video (.mp4)
- Microsoft Office (.word, .xls, ppt)

NOTICE:

Image files are displayed directly within the conversation as shown in the figure below.

NOTICE:

You can find the complete list in the *OpenScape UC Installation and Configuration Guide*.

NOTICE:

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

4.17.2.1 How to Add an Attachment to a Chat Message

You can add an attachment to a message with one of the following ways:

- Click the paper clip icon next to the message box to browse and select a file from your local computer.
- Copy and paste images directly into the message box.

  NOTICE:

  You must place your mouse cursor within the chat text box when you paste the image.
- Drag and drop a file into the message box (one file at a time).

Step by Step

1) Create a new message or edit an existing message.
2) Attach a file with one of the ways mentioned above.
3) Click the icon or press **Enter** to send the attachment.

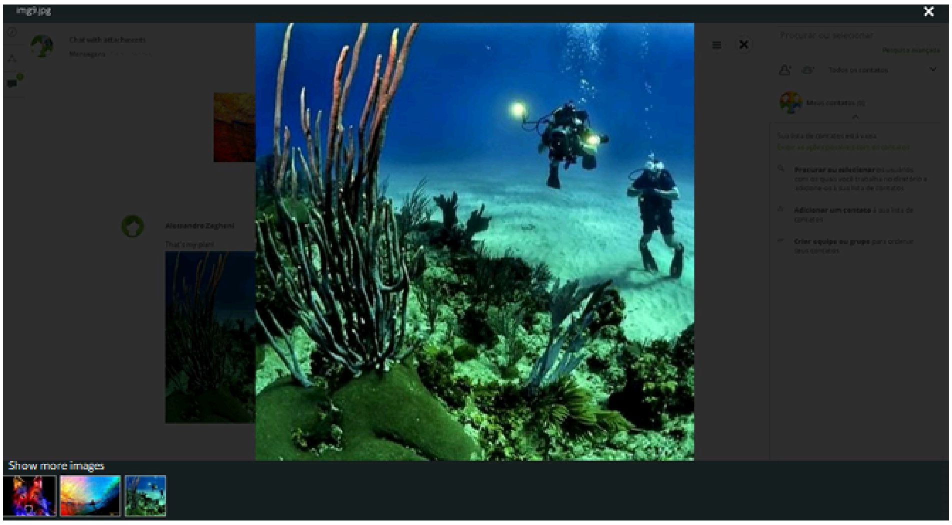
> **NOTICE:**
>
> Only one attachment can be sent at a time.

To remove an attachment before sending the message, hover your mouse over the icon next to the file name of the attachment in the lower part of your chat screen. The paper clip icon will turn into an "x". Click it to remove the attachment.

4.17.2.2 How to Download file attachments

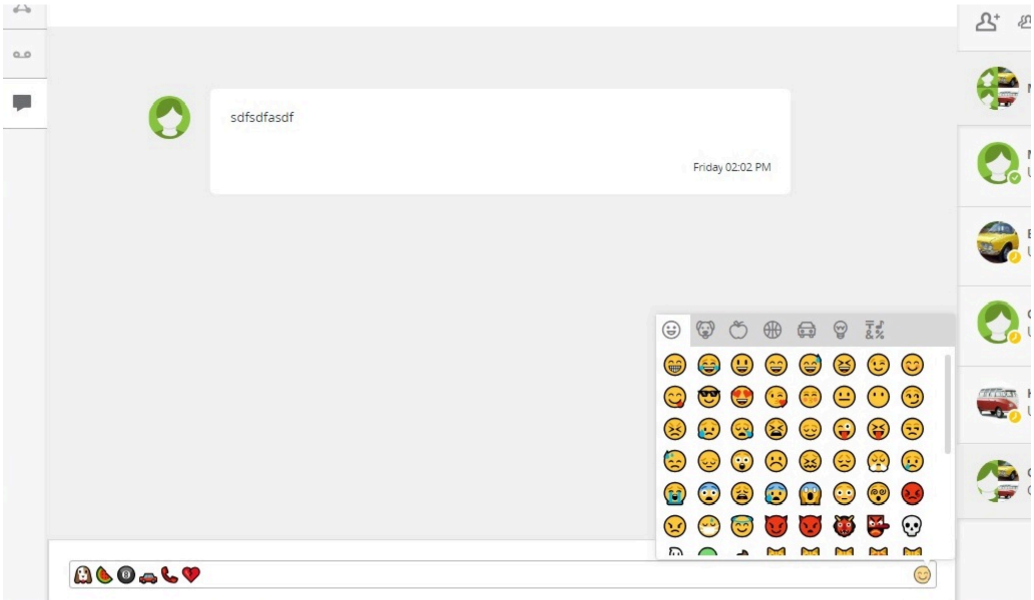
A file attachment in a conversation can be downloaded, saved and opened in your local system. You can download a received file by clicking on it in the conversation area. If it's a picture, the image viewer will be launched as described below.

Click on the image in your conversation window to enlarge it in an internal viewer. In the chat internal enlarged image view, other images already downloaded for this conversation are also displayed in the bottom left part of your screen. You can select and navigate between the shared pictures of this certain conversation via this view like in the figure below:



4.17.3 Chat Emoticons

You can send emoticons/emojis via the chat interface. Click the emoticons icon to display the different tabs of emojis as shown in the figure below:



NOTICE:

Emojis will not be displayed colored when using Windows 7 or Internet Explorer.Backward compatibility is not supported for Emojis. All emojis sent by old clients (lower than V1R8) will not be displayed in theWebclient.

4.17.4 How to Delete a Chat Message

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

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

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

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

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

Step by Step

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

The **Communication Options** available are displayed.

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

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

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

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

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

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

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

e) Call another UC user, by clicking .

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

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

g) Pin the chat, by clicking .

The following tabs are displayed in the chat panel:

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

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

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

b) Select the chat you want to view.

NOTICE:

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

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

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

4.17.6 Starting and using the chat in a conference call

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

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

   The chat panel is displayed.

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

2) During the conference, you can do the following actions using the chat:
   a) Type a new message in the message box and send it by click the icon or pressing the `Enter` key.
   b) Send an emoji, by clicking the icon displayed on the right side of the message box.
   c) Add attachments, by clicking the icon, displayed on the right side of the message box.
   d) Delete chat messages, by clicking **Delete** at the bottom of the message.

   The following tabs are displayed in the chat panel:

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

3) After the conference ends, you can view the chat messages and attachments shared during the conference call.
   a) Click to open the **Conferences** tab.
   b) Next, click **Conference Chats**.
   c) Select the conference for which you want to view the chat messages and attachments shared.

      The following tabs are displayed:

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

      NOTICE:

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

4) To hide the chat panel in a conference call, click on the call control bar.

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

4.18 Web Collaboration

Using the client you can extend a call, a phone conference or a chat by a parallel Web Collaboration session.

How to initiate such a Web Collaboration session is described in the chapters covering the general call control, conferencing and instant messaging.

Furthermore, you can initiate an individual Web Collaboration session via:

- A contact or contact group

  You find details on this method in the chapter about contacts.
- An entry in your call history

  You find details on this method in the chapter covering the call history.
- An entry in your voicemail list

  You find details on this method in the chapter on voicemails.

How to control a Web Collaboration session via Fastviewer is described in the *OpenScape Web Collaboration, User Guide* manual.

The system can be deployed by two distinct WebCollaboration modes, via Fastviewer or via WebRTC. These two modes cannot coexist in the same system.

The WebCollaboration via WebRTC is only available during active calls or Conferences.

4.18.1 How to Join a WebCollaboration via Fastviewer

A communication partner may invite you for a Web Collaboration session. If you wish to join this session, you must do so actively.

Prerequisites

A signaling bar points to the start of the Web Collaboration conference.

Step by Step

1) Select  in the signaling bar.

The participant module for OpenScape Web Collaboration is being downloaded. The downloaded file is displayed to you in your browser under the downloads.

2) Start the participant module.

The Web Collaboration window opens.

> **NOTICE:**
>
> How to control the Web Collaboration session is described in the *OpenScape Web Collaboration, User Guide*.

4.18.2 Initiating Screen Sharing

During an active call with a UC WebClient user, you have the option to share your screen. You can also share the system's audio for an improved sharing experience.

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

If you wish to share your system's audio along with your screen, 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.

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

4.18.3 How to make a Web Collaboration Session using WebRTC Screen Sharing

When the user is in active call or in a Conference, a user can start a WebRTC screen sharing.

Click on  in the signaling bar.

The options to select the screen you want to share will be automatically displayed without the need to download any file. Once the screen is selected, the other UC user parties will have the screen share view automatically open

The screen sharing icon gets green for the user that is actively sharing screen and the icon will be blank for the users that are simply watching.

Any party can start screen share at any time, just by pressing the screen sharing button.

4.18.4 How to Enable WebRTC Screen Sharing in a call with an external contact

This feature allows you to share screen information with an external contact by sending an URL for this purpose.

Prerequisites

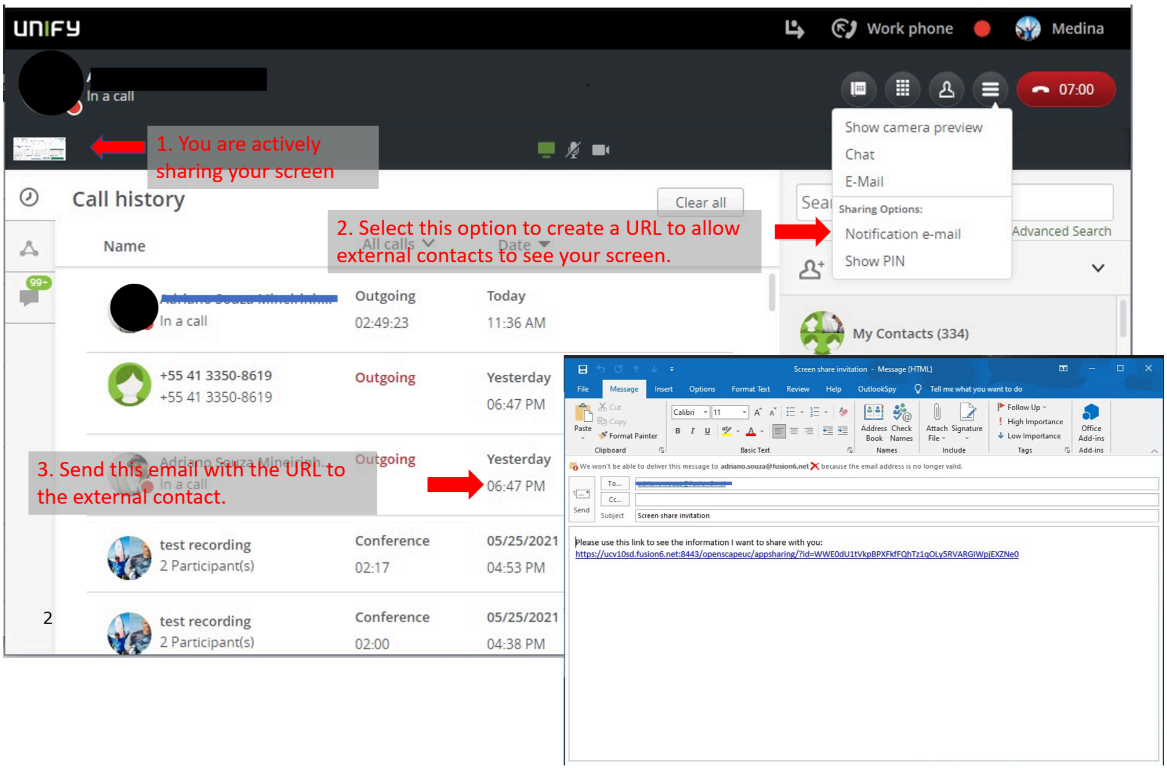
You are sharing your screen.

Step by Step

1)

During screen sharing click on the button and under **Sharing Options** click on **Notification e-mail**.

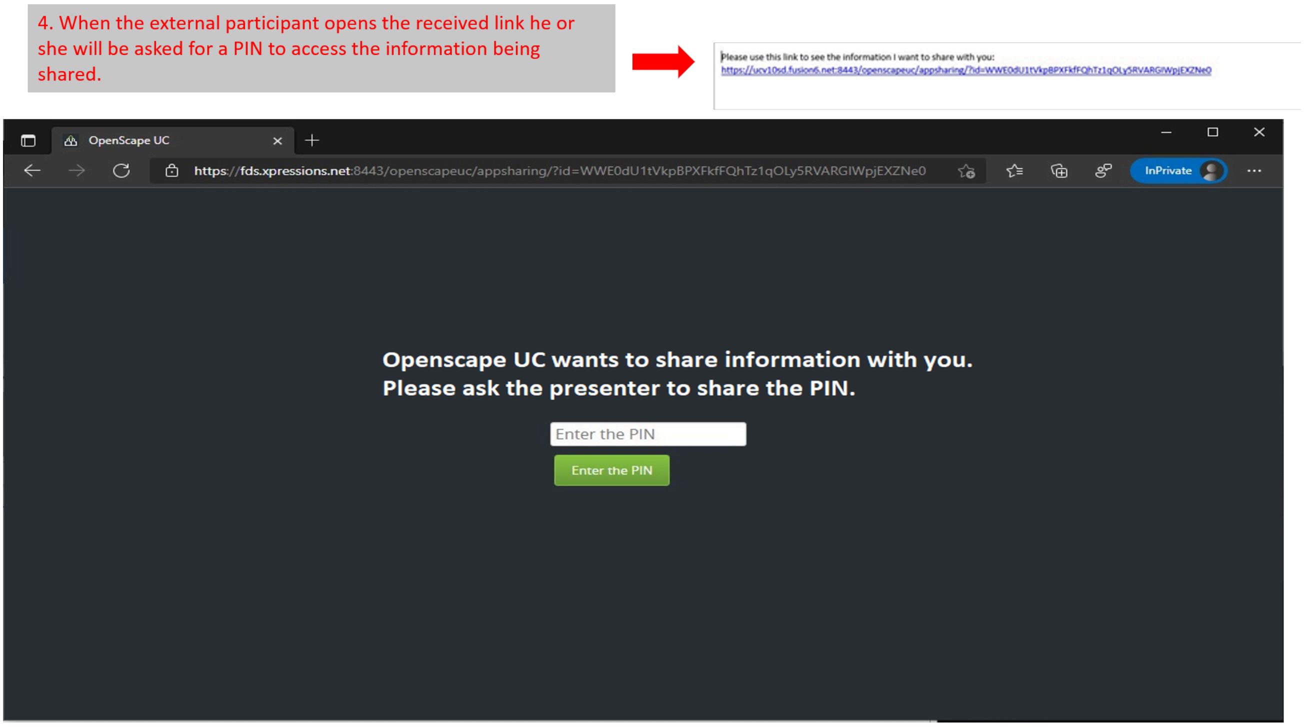
A Screen share invitation email with the URL is generated.



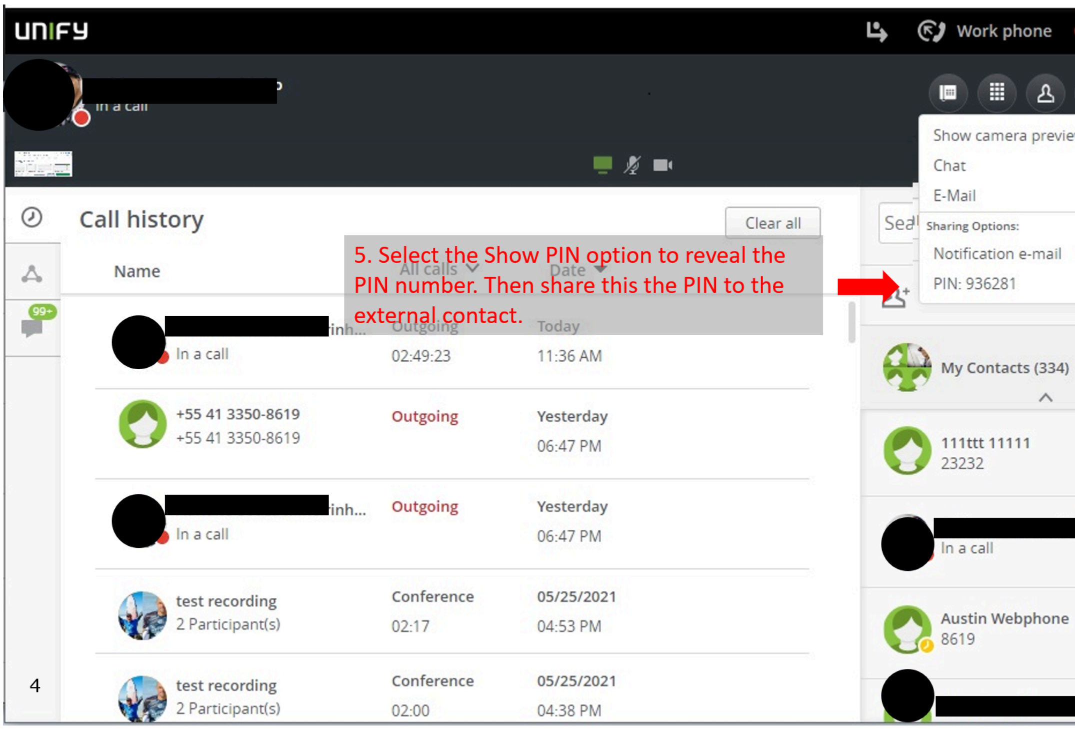
2) Send the e-mail with the URL link to the external call participant.

3) The external participant receives the e-mail and has to open the attached URL address.

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



4) Click on the **Show PIN** option under Sharing Options as show in the figure below to reveal the 6-digit PIN:



5) Share tthe 6-digit PIN with your external contact to grant them access to your shared screen content.

6) Once the external contact enters this PIN to the URL page (Step 3) then they are able to view your shared screen.

4.18.5 How to Use Mouse Pointer during WebRTC Screen Sharing

In case your UC system is deployed with WebRTC Screen Sharing, you can also use the mouse pointer functionality. The screen sharing presenter must be using the UC Desktop App or Fusion for Office Clients to enable the mouse pointer functionality.

When you select to share your entire screen you have the "Enable Pointer" check box option available to you. You can disable or keep it enabled as it is by default. When the mouse pointer option is enabled, all conference participants, on any client, can click or perform a long press on the screen to draw attention to a specific point of your shared screen. Clicks and long presses are shown to all other conference participants alongside their names, as displayed in the figure below:

4.18.6 How to Request Desktop Remote Control during WebRTC Screen Sharing

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

Prerequisites

A conference participant is sharing entire screen.

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

Step by Step

1) Click on the  button to send a request message to the screen sharing presenter.
2) The current presenter receives a prompt with a message about your request for remote control and can click to **Allow** or **Decline**.
3) If you are granted with remote control, you can now control the shared scree. However, the presenter can stop the remote control process at anytime by clicking on **Stop**.

4.19 Simple and Advanced Forwarding Rules

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

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

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

The OpenScape UC Application provides the ability to set simple or advanced forwarding rules.

Backward Compatibility with rules created in previous OpenScape UC releases:

Compatibility with Rules created in V9R3 format:

- Rules and profiles won't be deleted during upgrade.
- In general, it's possible to edit these rules. The exceptions are mentioned in the topics below.
- V9R3 rules will be included in a profile called Smart Client, that can be activated and used.
- If an existing V9R3 rule has an exception list, this rule will not be editable in the new UI. Such rule will work normally if the corresponding profile is activated. This exception exists because in V10 rules are now based in White Lists.
- If an existing V9 rule has an action to change presence, this action will be ignored in UCV10. From UCV9R4 on, change presence is a profile configuration.

4.19.1 How to Create a Simple Forwarding Rule

You can forward your incoming calls to other lines when your line is busy or in case you do not answer. The option of simple forwarding is only available when the preferred device is set on the work phone. Simple forwarding rules are always valid until they are cancelled or overwritten by an advanced rule.

Step by Step

1) On the task bar click on and select **Forwarding and rules settings**.

2) Click on the **Simple forwarding** tab (if not already selected).

3) Select **Enable call forwarding**

a) In case you want to use conditional forwarding (i.e. you are busy and / or you don’t answer) activate the check box **Conditional forwarding**.

In case you want to forward your call when you are busy, enter a name or number in the field **Search for contact or number** under **If my phone is busy, forward my calls to**:

In case you want to forward your calls when you don’t answer, enter a name or number in the field **Search for contact or number** under **If I don’t answer, forward my calls to**:

> **NOTICE:**
>
> You can have the call forwarding for busy and don’t answer in parallel.

b) In case you want to forward all your calls (e.g. you are on holiday and you redirect your calls to your deputy) click on the check box **Forward all my incoming calls**.

Enter a name or number in the field **Search for contact or number**.

c) In case you want to redirect all your calls to the voicemail box click on **I want to redirect all my calls to my Voicemail**.

> **NOTICE:**
>
> This option is written in green letters.

Furthermore in the field **Search for contact or number** your voicemail has been selected automatically.

You have created your forwarding rule

> **NOTICE:**
>
> An advanced rule can overwrite your simple forwarding rule.

4.19.2 How to Create an Advanced Rule

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

Step by Step

1) On the task bar click on and select **Forwarding and rules settings**.

2) Click on the **Rules** tab

3) Click on **Add new Rule**

4) In the **Name** section enter a name in the field **insert name for rule**

5) Define when the rule should be applied in the **Time and range**

a) in case you want the rule to be applied always select on the arrow **Any time and day**

> **NOTICE:**
>
> **Any time and day** is the default setting

b) in case you want the rule to be applied on specific days select on the arrow **Define time period**

From there you get the submenu **Choose day or date**

On the arrow you get the options **Time period** and **Specific days**

- In case you select **Time period** in the boxes you define from and to and also you can define **Any day** or **Specific week day**.

- In case you select **Specific days** you can click on the week days. The selected days are highlighted in green.

Also you can define if you want the **Whole day** or **Set time frame**.

6) Under **If my status is** you can select a presence state which trigger the rule. The default is **Not set**. When you click on the arrow you can select the presence state when the rule should be applied.

7) Under **If call is from** you can specify the persons or groups.

a) When you click on the check box **Person** you can select one or more persons.

b) When you click on the check box **Groups** you can select one or more groups.

> **NOTICE:**
>
> The check box **Group** is only displayed if you have at least created one group.

It is possible to select both check boxes **Person** and **Groups** in parallel.

8) Under **Forward to** you can specify how the call should be handled.

a) **Put straight through**

In this case the call is not forwarded.

b) **Device**

You can specify your device where the call should be forwarded, e.g. your mobile.

c) **Person**

You can specify to whom the call will be forwarded, e.g your delegate, secretary.

9) Click on **Save** on the top

You have created your rule. In order the rule can be applied the rule must be assigned to a profile. Refer to How to create a profile

4.19.3 How to Edit an Advanced Rule

You can edit the details of advanced rules.

Step by Step

1) On the task bar click on and select **Forwarding and rules settings**.
2) Click on the **Rules** tab
3) hover with the mouse over the rule. On the right side you see a small pencil
4) Adapt the section(s) you want to modify.

   How to work with the sections refer to How to Create an Advanced Rule
5) Click on **Save**.

4.19.4 How to Disable an Advanced Rule

You can disable an advanced rule.

Step by Step

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

   You can find more information under the profile section, refer to How to edit a profile and How to deactivate a profile.

4.19.5 How to Delete an Advanced Rule

You can delete an advanced rule.

Step by Step

1) On the task bar click on and select **Forwarding and rules settings**.
2) Click on the **Rules** tab
3) hover with the mouse over the rule. On the left side you see a small x.
4) Click on **Save**.

4.20 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.

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

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

Prerequisites

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

Step by Step

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

   The whiteboard is added to the active conference call.

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

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

   The whiteboard tools available are described in the following table:

Table 1: Whiteboard tools

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

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

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

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

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

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

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

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

4.21 Surveys

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

Surveys can be distributed in one of the following ways:

- Start a survey during a conference call.

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

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

You can do the following actions on surveys:

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

Each survey can have one of the following statuses:

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

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

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

4.21.1 Creating a survey

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

Step by Step

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

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

   The survey creation page opens with the following two tabs:

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

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

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

The following survey elements are available:

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

4) Configure the survey:

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

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

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

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

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

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

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

   In this area, you have the following options:

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

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

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

4.21.2 Editing a surveys

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

Step by Step

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

   The surveys created previously are displayed in this area.

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

   The survey questions and settings are displayed.

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

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

4.21.3 Starting a survey during a conference call

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

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

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

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

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

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

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

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

Step by Step

1) Click on the call control bar.

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

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

3) Click **Yes**.

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

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

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

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

4.21.4 Sending survey invitations

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

Step by Step

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

The list of available surveys is displayed.

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

3) Click and select **Invitation**.

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

From here, you can do one of the following:

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

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

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

4.21.5 Survey responses

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

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

4.21.5.1 Showing survey results during a conference call

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

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

Step by Step

1) Click on the call control bar.

A new window is displayed informing that the survey is running.

2) Click **Show results**.

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

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

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

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

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

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

  This option saves all the information displayed in the PNG file

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

4.21.5.2 Showing survey responses

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

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

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

Step by Step

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

The list of surveys is displayed in this area.

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

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

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

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

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

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

4.21.5.3 Clearing survey responses

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

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

Step by Step

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

The list of surveys is displayed in this area.

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

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

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

4) Click **Yes**.

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

4.21.5.4 Printing survey responses

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

Step by Step

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

The list of surveys is displayed in this area.

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

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

4.21.6 Deleting a survey

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

Step by Step

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

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

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

The survey is removed from the list of surveys.

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

4.22 Profile overview

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

In the profile you can

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

IMPORTANT:

Only one profile can be at a time active.

NOTICE:

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

4.22.1 How to create a profile

Step by Step

1) On the task bar click on and select **Forwarding and rules settings**.
2) Click on the **Profile** tab
3) Click on **Add a new profile**
4) In section **Profile name** enter a profile name.
5) In section **Set presence status** you can set a presence state which will be applied when the profile is active. It is optional. In case you want to set a presence status click on the arrow near to **Choose Presence** and select the presence status.
6) In section **Rules of the profile** click on the arrow near to **Rules**.
   a) You can add further rules by clicking on the arrow again.
   b) If you have assigned more than one rule on the right side you see arrows so you can modify the sequence of the rules. The order is important. On the left side there is a small x, so you can remove a rule just in case you added accidently a rule you do not want or need.
7) Click on **Add profile**.

4.22.2 How to activate a profile

Step by Step

1) On the task bar click on and select **Forwarding and rules settings**.
2) Click on the profile you want to activate.

4.22.3 How to edit a profile

Step by Step

1) On the task bar click on and select **Forwarding and rules settings**.
2) Click on the **Profile** tab
3) Hover with the mouse over the profile and on the right side click on the pencil
4) Edit the sections you want to change.

   Refer to How to create a profile to see what can be entered in the sections.
5) Click on **Save profile**

4.22.4 How to deactivate a profile

Step by Step

1) On the task bar click on and select **Forwarding and rules settings**.
2) Click on **Deactivate profile**.

4.22.5 How to delete a profile

Step by Step

1) On the task bar click on and select **Forwarding and rules settings**.
2) Click on the **Profile** tab
3) Hover with the mouse over the profile and on the left side click on the x

4.23 Greetings overview

With V9R4 it is possible to record greetings which are played when a call is redirected to your voicemail.

NOTICE:

A project-specific release is required to activate this feature.

There are several greetings possible

- Default greetings
- Single greeting
- Vacation greeting
- Business greeting

The greetings can be defined in **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

4.23.1 Default greeting

The default greeting is the system generated greeting and is selected by default.

In the **Settings** > **Voicemail** tab select the radio buttton **Default greeting**.

Click on **Save**.

Recording your name

You can record your name so that your name is used for the **Default greeting**.

1) At the bottom there is the section **Recording of name**, you may need to scroll down.

   When you click on the microphone you can record your name. While the recording is active the microphone icon gets red. Clicking on the microphone icon stops the recording.

   When you click on the communication options you can either **Load from File** or **Download**.

   > **NOTICE:**
   >
   > Only wav-files are supported.

   When you click on the playback icon you can hear what you have recorded.
2) Click on **Save**.

4.23.2 Single greeting

You can record a single greeting, e.g. to inform who is your delegate or when you are available again.

1) In the **Settings** > **Voicemail** tab select the radio buttton **Single greeting**.
2) Click on the arrow **Settings**
3) Now you can record, playback, download or load your greeting
   a) When you click on the microphone you can record your greeting. While the recording is active the microphone icon gets red. Clicking on the microphone icon stops the recording.
   b) When you click on the communication options you can either **Load from File** or **Download**.

   > **NOTICE:**
   >
   > Only wav-files are supported.

   c) When you click on the playback icon you can hear what you have recorded.
4) When you enable the check box **Do not allow recording voice mails** the caller cannot leave a message, just here your greeting.
5) Click on **Save**.

4.23.3 Vacation greeting

You can record a vacation greeting, e.g. to inform who is your delegate or when you are available again.

When selecting this option all your calls are redirected to your voicemail.

> **NOTICE:**

When using the vacation greetings feature if an other call forwarding rule is already set, the automatic call forward to voicemail will not be enabled. If you have an active profile then some calls might be forwarded before they reach your voicemail. For both these scenarios you will see a warning message displayed when selecting the **Vacation greeting** radio button.

1) In the **Settings** > **Voicemail** tab select the radio buttton **Vacation greeting**.
2) Click on the arrow **Settings**
3) Now you can record, playback, download or load your greeting
   a) When you click on the microphone you can record your greeting. While the recording is active the microphone icon gets red. Clicking on the microphone icon stops the recording.
   b) When you click on the communication options you can either **Load from File** or **Download**.

      NOTICE:

      Only wav-files are supported.

   c) When you click on the playback icon you can hear what you have recorded.
4) When you enable the check box **Do not allow recording voice mails** the caller cannot leave a message, just here your greeting.
5) Click on **Save**.

4.23.4 Business greeting

You need to record two greetings, one greeting is used during your business hours and the other greeting is used outside your business hours.

1) In the **Settings** > **Voicemail** tab select the radio buttton **Business greeting**.
2) Click on the arrow **Settings**

   Now you get the possibility to record a greeting for the business hours and another one for outside the business hours.
3) At the section **The greeting used when you are at work**, you can playback, record, download or load from file your greeting (during business hours).
   a) When you click on the microphone you can record your greeting. While the recording is active the microphone icon gets red. Clicking on the microphone icon stops the recording.
   b) When you click on the communication options you can either **Load from File** or **Download**.

      NOTICE:

      Only wav-files are supported.

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

4) When you enable the check box **Do not allow recording voice mails** the caller cannot leave a message, just here your greeting.
5) At the section **The greeting used when you are off work**, you can playback, record, download or load from file your greeting (outside business hours).
   a) When you click on the microphone you can record your greeting. While the recording is active the microphone icon gets red. Clicking on the microphone icon stops the recording.
   b) When you click on the communication options you can either **Load from File** or **Download**.

   NOTICE:

   Only wav-files are supported.

   c) When you click on the playback icon you can hear what you have recorded.
6) When you enable the check box **Do not allow recording voice mails** the caller cannot leave a message, just here your greeting.
7) At the section **Specify your business hours** you can select the days and hours you are at work (You may need to scroll down).
   - Click on the days you are at work. The selected days are highlighted in green.
   - For each day you have specified enter te hour for **Start** and **End.**
8) Click on **Save**.

4.23.5 Rules and restrictions for greetings

Regarding the Greetings feature, you have to keep in mind the following rules and restrictions:

- Upgraded scenarios from simplified, enhanced and system administrator greetings are not supported. You should switch to the default system greeting and then you should record or upload your greetings using the new interface
- Previous recorded greetings will not be retrieved in the New Voice Mail Settings interface
- This feature is not supported in Internet Explorer and Safari browsers
- You need a secure connection (*https*) to support recording via the webclient.
- The supported file type for greetings is .wav
- Play and Record by phone (hard phone) is not supported
- Fusion4Office CTI mode (DEFAULTPROVIDER=OSA-Provider) is not supported by this feature
- It is not recommended to record greetings announcements or change the greetings settings using TUI (XPR Phonemail) or XPR WebAssistant

4.24 Accessibility Features

OpenScape Web Client V10 supports multiple Accessibility Features that enables the client to be more accessible to users with visual or mobility impairment who face difficulties to easily interact and navigate within Web Client and have direct access to all main Web Client functions.

The Accessibility features are listed below:

- **Screen reader support**: blind or visually impaired users rely on assistive technology such as screen readers to use their computers and follow the content on the screen. The Web Client has been tested with screen readers such as JAWS and NVDA.
- **Keyboard-operable interface**: enables expert users who prefer keyboard commands and people with motor or vision impairment who have difficulty in using a mouse to easily interact and navigate within OpenScape Web Client and have direct access to all main functions using keyboard shortcuts. For more information about the keyboard shortcuts please refer to following sections.

  Keyboard shortcuts can be used to automate tasks in JAWS.
- **Visible keyboard focus**: keyboard-only users and people with attention limitations need a clear focus indicator so that they can navigate easily through the interactive elements of Web Client (buttons, links, input fields, etc.). Keyboard focus becomes visible when the accessibility setting **Display a colored frame around the element on focus** is enabled.
- **High contrast text**: people with vision impairment and people with little or no color perception need more color contrast to make text easier to read on their device. The Web Client's interface contrast ratio between the text and its background complies with the Web Content Accessibility Guidelines (WCAG) 2.0, Level AAA, so that the text can be read by people with moderately low vision (who do not use contrast-enhancing assistive technology). Furthermore, a horizontal line under a tab title or a vertical line to the right of a tab icon makes easier for people to distinguish the active tab from the inactive ones.

4.24.1 Keyboard Navigation

Now in UC V10 it is possible to work only with your keyboard and not need your mouse. You can use keyboard shortcuts to navigate in the Web Client and have direct access to all the main client's function or make use of a visual keyboard.

4.24.1.1 Keyboard Shortcuts (hotkeys) for Windows

You can use keyboard shortcuts to navigate in the Web Client and have direct access to all main Web Client functions. You can view the list with the basic keyboard shortcuts in Web Client, by clicking on your name and then **Keyboard shortcuts**.

The following list describes all the available keyboard shortcuts in Web Client:

Description	Shortcut
Global	
Show keyboard shortcuts	Alt + K
Make call to selected item	Alt + C
Chat with the selected item	Alt + O

Description	Shortcut
Email the selected item	Alt + G
Start web collaboration with the selected item	Alt + W
New conference	Alt + P
Search or Dial	Alt + U
Open settings	Alt + I
Navigate through the main areas	Alt + T
Close dialog	Esc
Navigation	
Open Call History	Alt + 2
Open Conferences	Alt + 3
Open Voicemail	Alt + 4
Open Chats	Alt + 5
Previous tab	Shift + Tab
Next tab	Tab
Calls	
Answer incoming call	Alt + A
Decline or cancel a call	Alt + N
Leave call	Alt + L
Mute / Unmute audio	Alt + M
Hold / Resume call	Alt + H
Alternate calls	Alt + S

Browser	Shortcut
Chrome	Alt + Access key
Safari	Ctrl + Alt + Access key
Opera	Opera 15 or newer: Alt + Access key Opera 12.1 or older: Shift + Esc + Access key
Internet explorer	Alt + Access key
Firefox	Alt + Shift + Access key

4.24.1.2 How to enable the visual keyboard indicator

Make the keyboard focus visible on your Web Client interface by following the steps below:

Step by Step

1) Click your user name and navigate to **Settings > General**.
2) Locate the **Accessibility** section.
3) Tick the **Display a colored frame around the element on focus** check box.

   A coloured frame is displayed around the element on focus.

4.24.2 High Contrast Text

Open Scape Web Client supports high contrast mode which helps people with vision impairment or people with little or no color perception use the client more easily and effectively.

4.24.2.1 How to Activate the High Contrast functionality in Web Client

Activate the high contrast functionality on your browse by following the steps below:

Step by Step

1) Click your user name and navigate to **Settings > General**.
2) Locate the **Accessibility** area.
3) Tick the **Enable high contrast mode for the header bar** check box.
4) The header part in the top of your web browser, should be significantly darker compared to the grey color used by default

You can activate the high contrast functionality on your browse as well:

Example

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4.24.2.2 Activate the High Contrast functionality from your Chrome browser

To activate the high contrast functionality on your browser ,f ollow the steps below:

NOTICE:

This section refers to an add-on which is not installed in your Chrome browser by default.

Step by Step

1) Click on the contrast button on your Chrome browser bar.
2) Click **Enable**.
3) Select one of the radio button options, e.g *"Yellow on Black* "
4) Click on **Set as default scheme**.

Now the UI of your web client is in **High Contrast** mode.

4.24.3 How to use the Screen Reader feature

OpenScape Web Client V10 supports the use of Screen Reader feature. This an advanced technology that can help visually impaired users navigate the Web Client’s interface with the assistance of audio.

Prerequisites

Have installed JAWS in your system.

NOTICE:

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.

4.24.3.1 How to Configure recommended JAWS screen reader settings for use with Web Client

OpenScape Web Client V10 supports JAWS screen reading software. It is recommended to configure some settings in JAWS, before using the screen reading feature in Web Client. Please follow the steps below in JAWS Settings Center: .

Prerequisites

Have opened JAWS Settings Center.

Step by Step

1) Navigate to **Utilities** > **Settings Center** > **Web / HTML / PDFs** > **Reading** and in the **Web Verbosity Level** option, choose **Low**
2) In the **Speak Access Keys Within Web Page** section, uncheck this option.
3) In the **Images / Graphics** section, select **Alt Text**.

4) Navigate to **Utilities** > **Settings Center** > **Web / HTML / PDFs** > **Keyboard** > **General** and in the **Navigation Quick Keys** section, select **Off**.
5) Navigate to **Utilities** > **Settings Center** > **User** and in the **Typing Echo** section select **Words**.
6) Click **Apply** and **OK** to save your changes.

For more information regarding JAWS settings and configurations, please refer to the JAWS official documentation at:
`https://support.freedomscientific.com/downloads/documentation`

4.25 UC and Microsoft Teams Integration

OpenScape UC can be integrated in Microsoft Teams. A new OpenScape UC tab can be added in the Microsoft Teams tab panel.

Using the UC tab you can now access UC functions directly from the Microsoft Teams platform:

- Access your UC list of contacts
- Make a UC call

For detailed information on how to configure and use the Microsoft Teams Integration feature please refer to the *OpenScape UC Application V10, Microsoft Teams Integration, Deployment Guide.*

4.26 UC Guest Access Feature

The WebRTC technology enables external participants (non UC users) to participate in UC Conferences without the need of hardphones or third-party softphone.

IMPORTANT:

Pre-requisite for using the Guest Access feature is to have the WebRTC configured in your UC System.

Any external invitee can join a UC conference via a web browser using the Guest Access link that is provided in a conference invitation.

You are invited to the conference "guest access".

Creator: Jorge Hastreiter
Date & Time: <Ad-Hoc>
PIN: 699627

This conference supports video

To see the presentation, you may download the following application:
http://192.168.159.51:8070/fvclient/fastclient_i_69962786.exe
or you can access the following link:
http://192.168.159.51/JoinClient.aspx?inv=69962786

To join this conference using your computer, please use this Guest Access:
https://uc.qalabcur.com:8443/openscapeuc/conference/SDViYnlzSVA3VXgzlUo5NBG_jAcsC61H7wTnhxcl53Y

To join this conference via phone, please dial +554133508599, and enter the PIN: 699627#

To join this conference with your Openscape Webclient, please click here:
https://uc.qalabcur.com:8443/openscapeuc/dial/+554133508599,699627#

As a guest non UC participant in the conference, the Guest Access feature enables you to use all the UC user functionalities with the restrictions that already apply. That is, an external non UC user can:

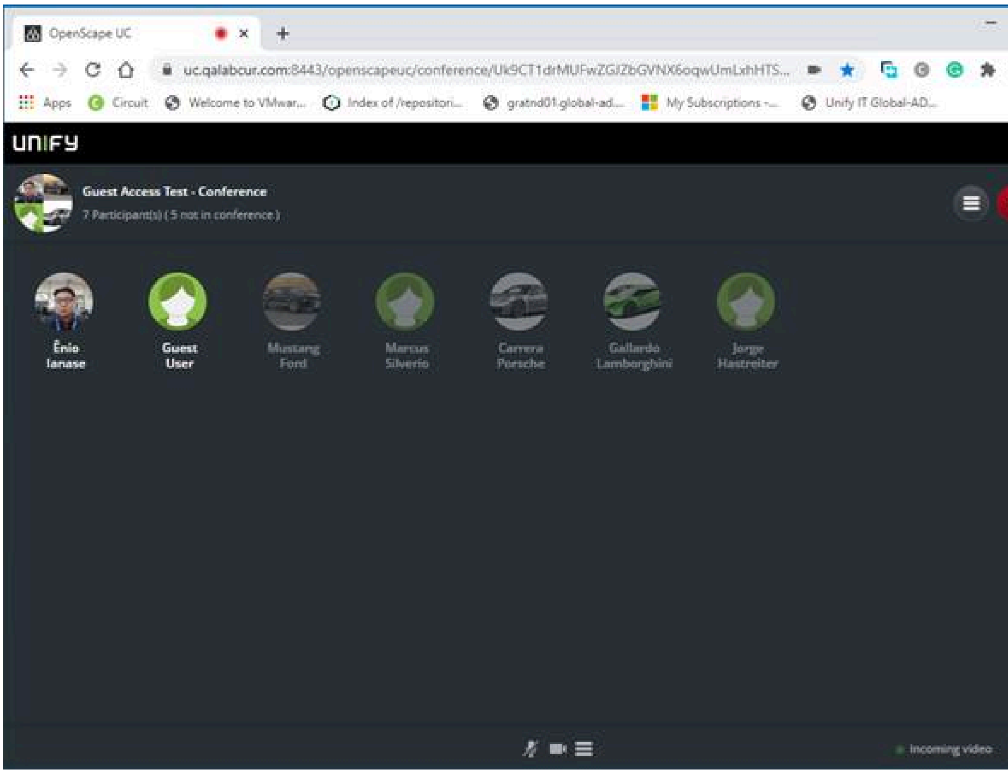
- Share video via the configured camera,
- Mute or unmute the microphone.
- Share screen.

NOTICE:

It is recommended to download FastViewer for the share screen functionality.

- Display or hide the conference video.

  Click on **Show video** in the lower right corner of the conference page to display the conferences video. Once in the Video view, you can go back to the conference view by clicking **Show details**.



In order to use the Guest Access feature you need to have the WebRTC feature configured in your UC system. For more information please refer to *OpenScape UC Application V10, Installation and Upgrade Guide* or contact your system administrator.

4.26.1 How to Join a UC Conference using Guest Access

A guest can join a UC conference via a WebRTC connection using the Guest Access link.

Prerequisites

Non UC user with a Guest Access invitation link.

Step by Step

1) Click the Guest Access link to open the UC Conference on your web browser .

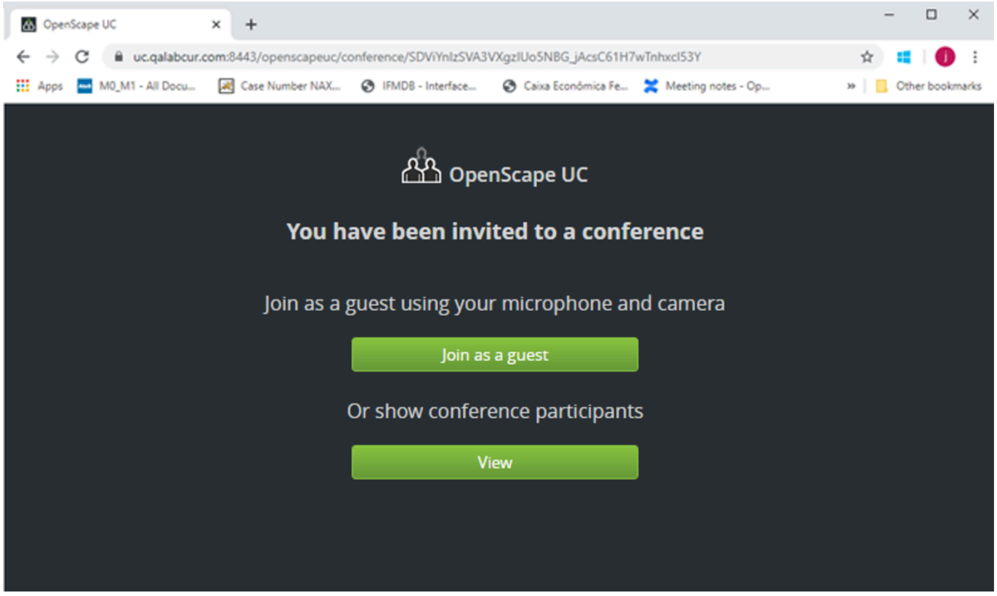
The conference guest access page will load in your browser.

2) Click on **Join as a guest** in the guest access page to access the conference using your computer's microphone and camera.

- If you wish to only display the conference participants then you can select the **View** option.

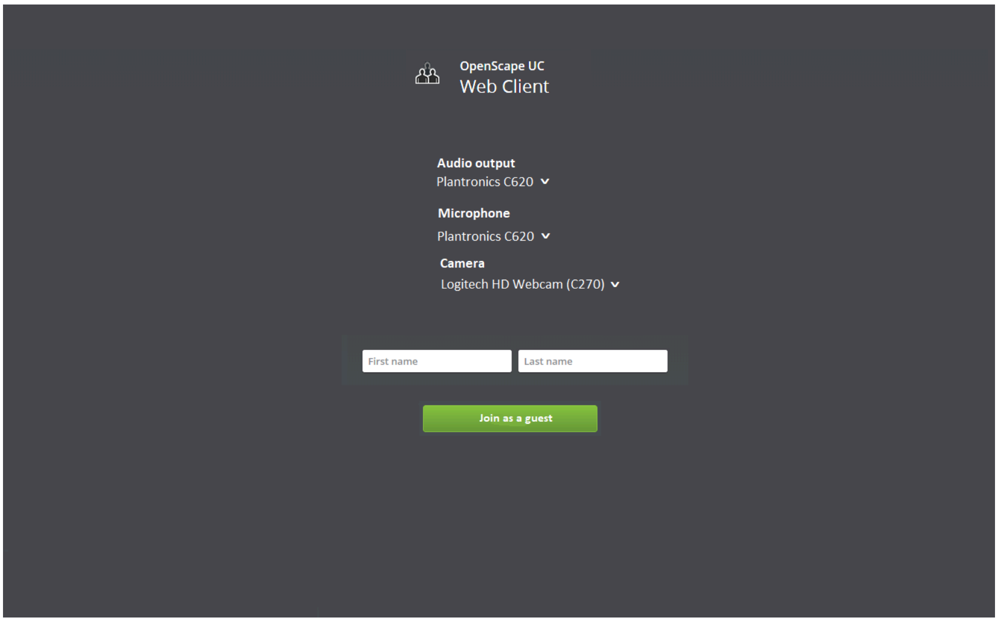
NOTICE:

This option makes it possible for a guest to join via a phone device and only use the browser guest access in order to view the participants in the conference.



3) In the next page, enter your **First name** and **Last name** and click again on **Join as a guest**.

You can select your audio output and input as well as your camera.



You have now joined the conference as a guest. Your name will appear in the list of participants as defined in the last step above. You can view the conference name, the active speaker and the other participants.

4.27 QR Code for OSMO Configuration

A QR code image can be displayed in the WebClient user profile to ease the configuration of user's OSMO client.

This feature must be activated in the OpenScape UC Server. For more information, refer to the OpenScape UC Configuration and Administration Guide.

Once the feature is activated, a new **QR Code** tab will be displayed in the WebClient User profile, with instructions on how to use it in OSMO.

The QR code contains the UC server URL, UC user name and the mobile number. The users can scan the QR code with their devices and the required data will be retrieved in the account details of the OSMO application.

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