OpenScape UC Application
OpenScape Web Client

User Guide

A31003-S5070-U102-8-7619

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

Reference No.: A31003-S5070-U102-8-7619

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Contents

History of Changes

Date	Changes	Reason
2012-03-02	ADDED: The call control window of a conference can be reached via a URL depending on the system environment.	FRN4401
2012-04-18	ADDED: Another call is displayed in the call control in addition to the ongoing conference.	CQ00191404
2012-04-19	ADDED: List of information and functions available in the **Call Control** window of an active conference if this window was opened via the URL contained in the conference notification e-mail.	CQ00206282
2012-04-21	ADDED: The conference system sends a conference notification e-mail only if an e-mail address has been specified for the external participant and the contact data of the OpenScape UC Application subscriber has been resolved via the **Directory Search**.	CQ00196472
2012-04-26	CHANGED: Several adjustments of the information about user presence and instant-messaging functionality.	CQ00207193
2012-04-27	ADDED: Information about automatic prolongation of a moderated Meet Me conference.	
2012-04-27	ADDED: Information about automatic prolongation of a scheduled Meet Me conference.	
2012-04-30	ADDED: Description of the function **Pop up on incoming IM-Message**.	
2012-04-30	ADDED: Restrictions on using the functions **Pop up on incoming call** and **Pop up on incoming IM-Message**: - Successfully tested for Internet Explorer 8 and 9 only - No other application window is maximized on the desktop at the same time - No other tabs are opened in the Microsoft Internet Explorer.	CQ00200613
2012-04-30	ADDED: Description of the radio button **Select/Deselect all entries** in the contact list.	FRN5340
2012-05-29	CHANGED: The list of the supported web browsers has been deleted. A current list of the supported web browsers is included in the manual OpenScape UC Application V7 Planning Guide.	CQ00212074
2012-05-31	CHANGED: Further adjustments of the information about user presence and instant-messaging functionality.	CQ00212602
2012-08-06	CHANGED: The personal status text is independent of the presence status.	CQ00225475
2012-08-17	CHANGED: The compact view opens by default when you open the program for the first time.	CQ00221746
2012-08-30	CHANGED: A callback is automatically initiated after the Tell-Me-When function time limit has expired.	CQ00218289
2012-09-11	ADDED: The configuration of new devices may be disabled for specific OpenScape UC Application users. In this case there is no way of removing devices from the device and named device list(s).	FRN4911, CQ00230770
2012-09-11	ADDED: Description and functions of the Team feature.	FRN4922

Date	Changes	Reason
2012-09-11	CHANGED: Scheduled Meet Me conferences created with OpenScape Extensions for Outlook can be deleted and edited by the creator via the OpenScape Web Client GUI. Each participant of such a conference can exclude himself/herself from the conference.	FRN5180
2012-09-14	ADDED: Restrictions on the correct representation of the conference notification e-mail in all languages.	CQ00225521
2012-09-19	ADDED: Information about the devices available for the **Action** (routing destination) setting of a rule.	CQ00226540
2012-10-26	CHANGED: **Common Management Portal** has been renamed as **Common Management Platform**.	FRN5833 CQ00232637
2012-11-09	ADDED: A call can be extended to an Ad-hoc web conference.	FRN4706
2012-11-09	CHANGED: A participant in a conference created with OpenScape Extensions for Microsoft Outlook who removes himself/herself from the conference participant list via the OpenScape UC Application conference list does not receive a Microsoft Outlook notification about this.	CQ00233776
2012-11-26	CHANGED: Section “User Login” describes now all three options of logging on to the OpenScape UC Application system via the OpenScape Web Client: Default login, Single Sign-On (SSO) and Windows authentication. The latter login option requires the Windows user name in the following format: <Windows domain name>\<Windows user name>.	CQ00229595
2013-01-03	ADDED: If the user has initiated a callback from a preferred device that is not his/her ONS device, the callback will in due course not be indicated on the preferred device but on the device with the associated ONS phone number.	CQ00238894
2013-01-21	CHANGED: Each team administrator can appoint any other team member who has been assigned the Team Administrator profile in the CMP as team administrator via the **Team View**. Consequently, the team administrator is also entitled to withdraw the Team Administrator privilege from other team administrators of the same team.	CQ00237620
2013-01-21	CHANGED: The voicemail entries in the **voicemail box** and the journal entries in the advanced view of the **journal** cannot be sorted by **duration**.	CQ00243131
2013-01-28	CHANGED: The **Force Member** option is no longer available for a new team member.	
2013-02-20	ADDED: When importing address data from a CSV file, all characters from 0x7F up to and including 0x9F are filtered out to avoid security problems.	CQ00247733
2013-02-21	ADDED: In case of a moderated Meet Meconference with many participants, the number of conference participants displayed in the **Call Control** is restricted for clarity.	CQ00244820
2013-02-28	ADDED: When creating a new contact, a video-compatible device **Video Phone** under which the contact can be reached can be configured in the contact form. The configured video device is displayed in the contact information dialog and in the **Contacts** window from where it can be dialed.	FRN4977
2013-04-12	CHANGED: Information about supported operating systems and browser versions removed. NEW NOTE: This information is now found in the OpenScape UC Application Planning Guide.	CQ00255180
2013-04-17	CHANGED: An active call held via the **Set active call to "on hold"** feature cannot be expanded to a consultation call.	CQ00256077

Date	Changes	Reason
2013-04-17	CHANGED: The **Handover to** feature is available in the **Call Control** of an active call with a HiPath 4000 connection.	
2013-04-18	ADDED: The OpenScape Web Client URL used for downloading the application OpenScape Desktop Integration must contain the FQDN of the OpenScape Web Client system to avoid possible certificate errors.	CQ00255330
2013-04-18	CHANGED: Only single voicemail entries can be deleted in the **Voicemail Box** dialog.	CQ00254233
2013-04-18	ADDED: In a team prompt, the tick to the left of the name of the requesting user must be set to enable accepting or blocking the prompt.	CQ00254711
2013-05-27	ADDED: Note: In case of an audio connection with an IVR application you cannot start a web conference with the same application.	CQ00258750
2013-05-31	ADDED: Supplementation of the VUI.	Review
2013-06-05	ADDED: No automatic or manual cookie deletion, because the Webclient authentication data will otherwise get lost and the user may be disconnected from the system.	CQ00262009
2013-06-18	ADDED: Ad-hoc conferences support audio only.	CQ00264104
2013-06-24	REMOVED: Button for toggling the small and large view of the user interface.	CQ00261398
2013-07-01	ADDED: If a contact is added manually, there is no option for sending a presence prompt. Review of the corresponding features.	CQ00260837
2013-07-17	CHANGED: If a contact is added via directory search, a presence prompt is automatically sent, even if the corresponding check box is unticked.	CQ00267150
2013-08-08	CHANGED: Named device lists are supported at HiPath 4000 also.	FRN6705
2013-09-02	ADDED: Phone numbers displayed to a user in a partner journal via the **Team View** are represented in exactly the same way as in the **Journal** of the relevant partner.	CQ00269900
2013-09-03	ADDED: To ensure that the selected internet page is displayed as your own tab/window, you must specify the complete URL inclusive http:// or https:// when creating a bookmark.	CQ00269900
2013-09-13	ADDED: The compatibility view must be disabled in the Internet Explorer.	CQ00272177
2013-11-04	ADDED: If the display of the private contact list is restricted to one address group, the shortlist for the **<Name or Number>** input field in the main menu displays only contacts found in the selected address group.	CQ00276242

1 About this Manual

The OpenScape Web Client is a browser-based CTI client with a connection to a HiPath 4000 or to an OpenScape Voice. It uses the internet connection to the OpenScape UC Application server. You only need a web browser to invoke the OpenScape Web Client. The OpenScape Web Client can thus be immediately used at any computer in the intranet. The user data is centrally backed up on the server. Even if the user computer is switched off, all journal information relevant to the user is maintained on the server and immediately available at the new login.

1.1 Target Group of this Manual

This manual addresses:

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

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

1.2 Contents of this Manual

This manual describes how to operate and configure OpenScape Web Client.

The information is structured as follows:

Chapter 1: About this Manual

In this chapter you find information about the structure and use of these operating instructions as well as a list of all acronyms used.

Chapter 2: Operation Reference

This chapter represents the different controls and explains how to use them.

Chapter 3: General Main Menu Settings

This chapter serves as reference for basic configuration via main menu.

Chapter 4: Communicating with Contacts

In this chapter you find information about the product's features that enable communicating with your contacts.

Chapter 5: Step-by-Step

The information contained in this chapter helps the user to familiarize himself/herself with the product's features.

Chapter 6: Rule Interpreter - Routing Calls by Rules

The rule interpreter enables the mobility of OpenScape UC Application users. In this chapter you find general information about the rule interpreter tool, instructions for setting different parameters of this tool and descriptions of its controls and their operation.

Chapter 7: Voicemail Settings

This chapter contains information about the configuration and operation of the voicemail system.

1.3 Representation Conventions

We use the following markups and representations to highlight information in this manual.

1.3.1 Formats and Display Forms

In the manual on hand the following conventions apply:

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

1.3.2 Notes

Types of notes

Critical notes and additional information are indicated in this manual in the following manner:

NOTICE: Denotes information worth knowing or useful tips.

IMPORTANT: Denotes information of **high priority**. Please definitely read and heed such notes to avoid malfunctions, loss of data or damage to devices.

1.3.3 Figures

This manual displays all input windows important for operation and configuration. Depending on the operating system, the browser used, the screen resolution, the configurations on your computer and your selection of the user interface style these dialogs may appear slightly different. Normally, this does not influence the described functionality .

1.4 Continuative Documentation

You find further information about OpenScape Web Client in the following documentation:

- *OpenScape UC Application V7 OpenScape Web Client*, quick guide.
  It describes the basic OpenScape UC Application OpenScape Web Client features.
- *OpenScape UC Application V7 Client Applications*, operating instructions
  This manual provides an overview of all OpenScape UC Application clients.

1.5 Acronyms

Table: Acronyms used

Abbreviation	Meaning
CCBS	Completion of Calls to Busy Subscriber
CCNR	Completion of Calls on No Reply
CMP	Common Management Platform
COS	Class-Of-Service
CSV	Comma Separated Value
CTI	Computer Telephony Integration

Abbreviation	Meaning
DNS	Domain Name System
DTMF	Dual -Tone Multi-Frequency
MLHG	Multi-Line Hunt Group
UC	Unified Communications
URI	Uniform Resource Identifier
VPN	Virtual Private Network

2 Operation Reference

This chapter contains detailed information about the various controls you find in the user interface.

2.1 General Information

In this section you find information about the supported languages as well as about the functional restrictions to be considered when using OpenScape Web Client.

IMPORTANT: The OpenScape Web Client does not work in a network with network devices (such as firewalls) between the front-end and application computer that separate TCP *idle connections*.

Supported web browsers

You find a current list of the supported web browsers in the *OpenScape UC Application Planning Guide* manual.

Setting languages via web browser

You set the user language in the web browser's language configuration. The current version supports the following languages:

- Chinese
- German
- English
- French
- Italian
- Portuguese (Brazil)
- Portuguese (Portugal)
- Russian
- Spanish
- Czech

Restrictions when using OpenScape Web Client

Please consider the following functional restrictions when using OpenScape Web Client:

- The OpenScape Web Client does not support multi-sessions. In other words, you cannot open several browser sessions for the same user. The same applies for parallel access with the OpenScape Web Client and OpenScape Desktop Client.

- You can accept an incoming call via the OpenScape Web Client (in the **Call Control**) only if the office phone (*ONS*) has been configured as preferred device at the time the call comes in. If another device has been chosen from the device list as preferred device, the icon for accepting a call is not available in the **Call Control**. The call can only be accepted via the device currently configured as the preferred one.
- If you do not use your office phone (*ONS*) but another device for outgoing calls, the PBX will first set up a connection to this currently preferred device. The call must be accepted at this device. Only then you can set up the connection to the desired conversational partner.
- If you wish to use the **Pop up on incoming call** and **Pop up on incoming IM-Message** in the OpenScape Web Client, the OpenScape Web Client must be able to put the program focus on the web browser used at any time. This is not possible with any web browser and under all operation conditions of a web browser.

> ***NOTICE:*** You find information about web browsers successfully tested for this function in the *OpenScape UC Application V7 Planning Guide*.

- Conference notification e-mails can only be represented correctly in all languages if the following requirements are complied with:
  – In the Microsoft Internet Explorer version 7 and later the **Use UTF-8 for mailto link** option must be activated under **Tools > Internet Options > Advanced > International***.
  – In Microsoft Outlook 2010 the **Allow UTF-8 support for mailto:protocol** option is active under **File > Options > Advanced > International options**.
  – In Microsoft Outlook 2007 the **Allow UTF-8 support for mailto:protocol** option is active under **File > Options > Mail Format > International options**.
- OpenScape Web Client users who are members of a Multi-Line Hunt Group (MLHG) at the same time must not configure a named device list as preferred device for incoming and/or outgoing calls.
- OpenScape Web Client users who are members of a Multi-Line Hunt Group (MLHG) at the same time must not configure their voicemail box as preferred device for incoming and/or outgoing calls.
- OpenScape Web Client users who are members of a Multi-Line Hunt Group (MLHG) at the same time must not deploy the rule interpreter or the *Rules* feature.

Restrictions when using OpenScape Web Client with Internet Explorer

You must disable the compatibility view in the Internet Explorer by deactivating the check boxes of all options in the following dialog:

Tools > Compatibility View settings

Restrictions when using OpenScape Web Client with Safari 5

Please consider the following functional restrictions when using OpenScape Web Client with the Safari 5 browser:

- The *desktop integration* is not supported with the Safari 5 browser for Mac OS and Microsoft Windows.
- The web conferencing application OpenScape Web Collaboration of the OpenScape UC Application is not supported for Mac OS.

2.2 User Login

You invoke the OpenScape Web Client in your preferred web browser. The system administrator provides the OpenScape UC Application system URL that you need for this purpose. Before you can use the OpenScape UC Application features via the OpenScape Web Client you need to log in at the OpenScape UC Application system.

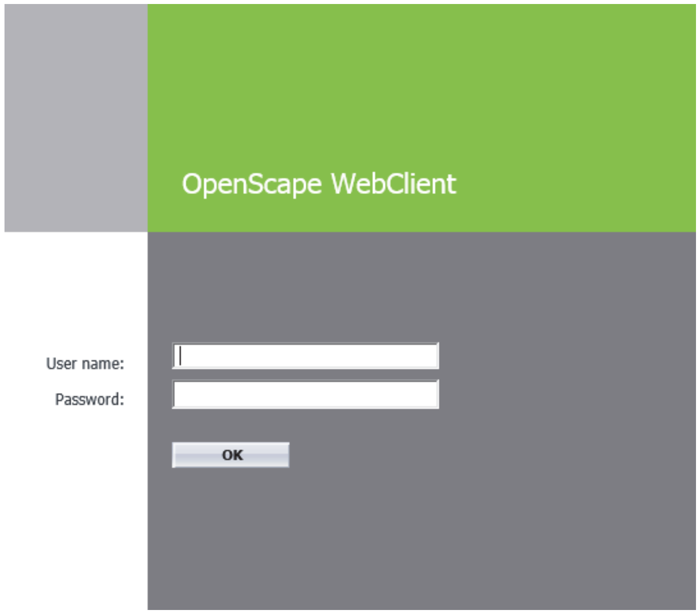
You stay logged in at the system until you have manually logged out via **menu > Log off** or after you have not used the OpenScape Web Client for more than 30 days.

> ***NOTICE:*** To authenticate the user the OpenScape Web Client places a cookie in the corresponding folders of your browser that must not be deleted. Therefore, make sure that the option to automatically delete cookies is not active when you shut the browser down. For example, the Microsoft Internet Explorer option **Cookies** under **Tools > Internet options > General > Browsing history > Delete browsing history on exit > Delete...** must not be active. Closing any browser window would otherwise disconnect you from the system and you would have to log on again. Do not delete the cookies manually either.

Users may log on in the following ways:

Default login

The OpenScape Web Client login dialog may look like this:



- **User name**
  Here you need to enter your user name for logging on to the OpenScape UC Application system.
- **Domain**
  This combo box lets you select your domain.

> ***NOTICE:*** The combo box for selecting a domain is only available when several domains have been configured. Selecting a domain is necessary only then.

- **Password**
  Enter here your password for logging on to the OpenScape UC Application system.

> ***NOTICE:*** For the initial login, you need to use the **Password** the system administrator has configured for your user account. We recommend to replace the pre-defined password with an individual one via the main menu **menu > Change Password** immediately after the initial login.

- **OK**
  With a click on this button the login data are transmitted to the system and the user interface opens.

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.

Windows authentication

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

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

You need to enter the associated Windows user password under **Password**.

2.3 Overview of the User Interface

After the first successful login at the system the OpenScape Web Client GUI opens with a pre-set structure. It contains the following elements:

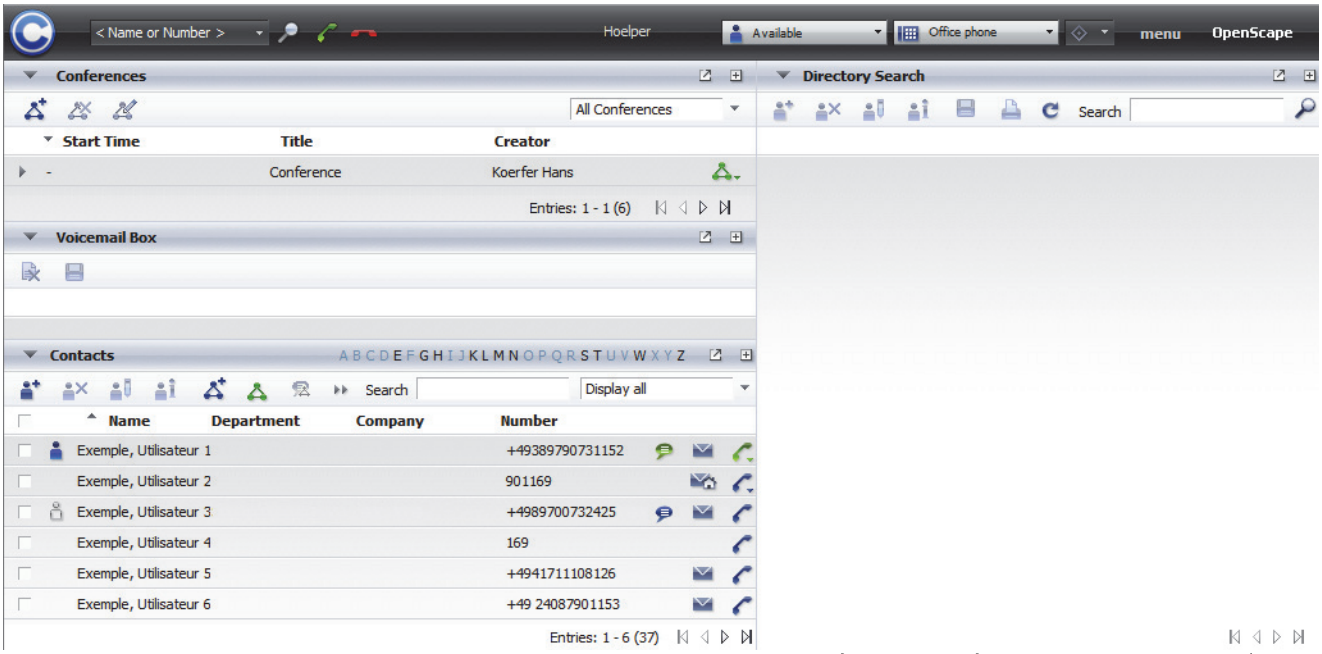
- **Main menu**

  You find the main menu at the top margin of the browser window. It enables fast access to the basic program features and settings.
- **Workspace**
  The workspace comprises all features displayed beneath the main menu and provides access to the features of various function windows.

Views of the user interface

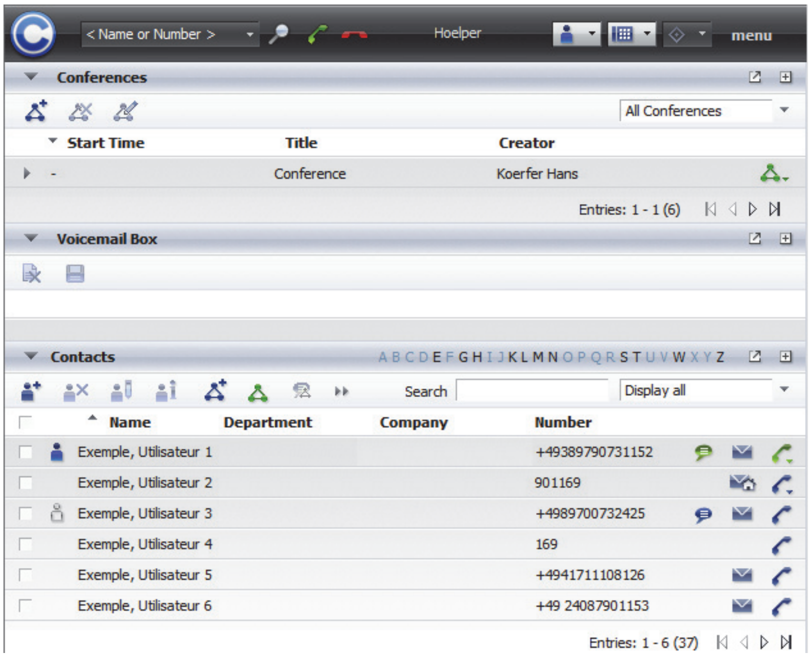
The user interface of OpenScape Web Client may appear with one of the following three views in the browser window:

- **Large view**
  The large view can represent several (at least two next to each other) selected function windows as frames positioned on top of or next to each other in the browser window. The below figure exemplifies the large view of the OpenScape Web Client interface with a possible arrangement of selected function windows.

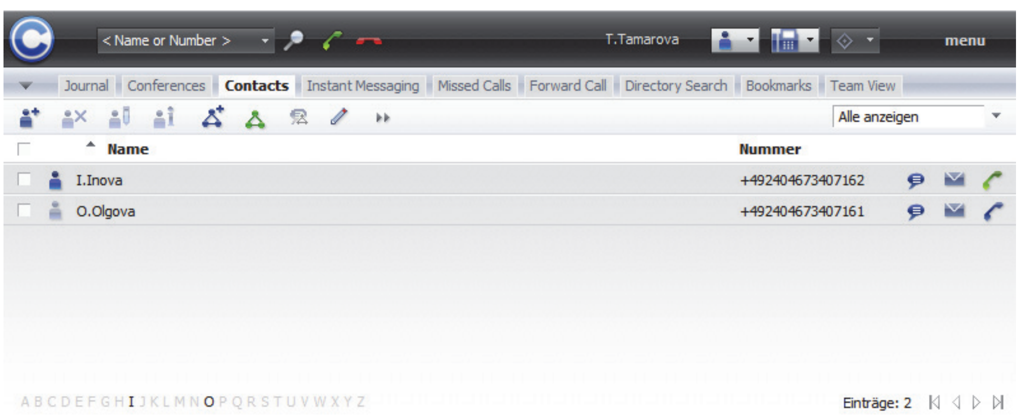


Each user can adjust the number of displayed function windows to his/her requirements.

- **Small view**
  The small view represents all function windows on top of each other in the workspace. The number of displayed frames can be customized here as well. All main menu features remain accessible. They only appear smaller, as you can see in the following figure.



- **Compact view**
  The compact view opens by default when you invoke the program for the first time. The main menu is minimized (as with the small view) and the workspace displays always only one function window.



Under the main menu you find a bar that displays the single function windows of the workspace as tabs. With a click on the tabs' names you can toggle the following function windows:

- **Missed Calls**
- **Journal**
- **Voicemail Box**
- **Conferences**
- **Contacts**

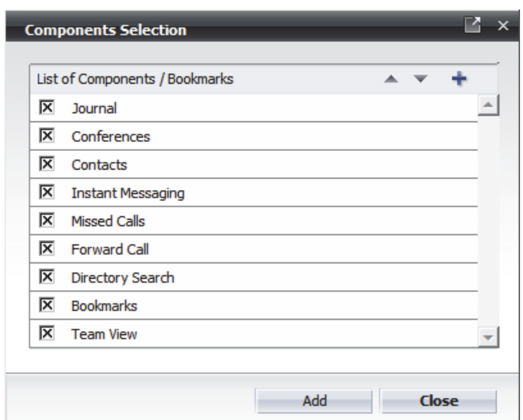
- **Instant Messaging**
- **Forward Call**
- **Directory Search**
- **Bookmarks**
- **Team View**

You reach the compact view only via the **main menu > menu > General > Common tab > Appearance tab** by selecting the **Compact view** option in the **Select start option** combo box. Then save the performed setting with a click on the **Apply** button. A click on **OK** closes the settings dialog.

> ***NOTICE:*** The compact view does not appear until you have updated your browser window - with a click on the corresponding button of your web browser of by pushing key **F5** of your computer keyboard.

Depending on the size of the web browser window, some tabs can be displayed only partially or not at all. Use ◂ or ▸ to move to a tab further to the left or to the right. If all tabs in the bar can be seen, the above icons are not available.

On the left hand side in the tab bar you find the ▾ icon. A click on this icon opens the function window selection. Another click on the icon closes the displayed list. When you select the **Edit ...** option in this list, the following dialog opens.



In this dialog you can tick or untick the corresponding check box to determine which tabs appear in the tab bar. All available tabs are selected by default.

The following functions are available in this dialog in addition:

- Changing the tab order

  With a click on ▴ or ▾ you can move the previously marked tab up or down in the list, which displays it further to the left or to the right in the tab bar.

– Creating a new bookmark

A click on + or on the **Add** button opens the **Bookmark Settings** dialog, in which you can create a new bookmark. When you select the newly created bookmark in the **Components Selection** dialog, it appears in the tab bar.

NOTICE: To ensure that the selected internet page is displayed as your own tab, you must specify the complete URL inclusive `http://` or `https://`.

You can edit and delete × all private bookmarks. You can neither change the default tabs nor remove them from the list.

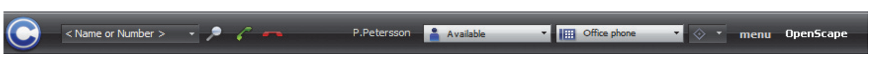
NOTICE: This view does not allow individual settings of the user interface via the **main menu > menu > Homepage**, because the **Homepage** option is hidden.

2.4 Main Menu

You can display the main menu with its extended or compact view in the browser window.

Extended view

You see the extended view of the main menu if you have selected the large view for the user interface of the OpenScape Web Client.



Compact view

The compact view of the main menu is available if you have selected the small or compact view for the user interface of the OpenScape Web Client.

The main menu features the following elements (from left to right):

- **Pearl menu**
  This is an application menu icon for accessing the basic OpenScape Web Client features.
- < Name or Number > **Input field**
  Input field for phone numbers or names combined with the combo box for displaying the phone numbers you have dialed last. With a click in this input field and after entering a phone number or name you can initiate a call or look for contact information.
  – After you have entered a number, click on to initiate the call.

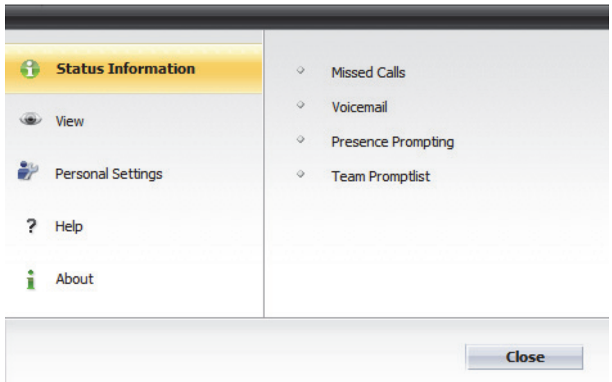
- If you want to obtain the contact data of a subscriber from all configured directories, click on after you have entered the contact's name.

While you enter the letters of a name in the input field, a shortlist opens if the specified characters match a name contained in your private contact list. If you have restricted the display of your private contact list to one address group, only contacts found in this address group are suggested.

- **Directory search**
  Click on this icon to open an input mask in which you can look for a contact by specifying different search criteria.
- **Call subscriber**
  Click on to dial the phone number you have entered via keypad.
- **Drop a call**
  Click on to end an active call.
- **Name display**
  Displays your user name
- Available or **Presence Display**
  Presence display in the form of a combo box, which displays your current OpenScape UC Application user status. After a click on this combo box you can change this status via a selection list.
- Office phone or **Device Display**
  The device display combo box shows the device currently used for the communication. Hover with the mousepointer over the combo box to display a quick info showing the device name and address (phone number). After a click on this combo box you can change the device used via a selection list.
- **Rule Profile Display**
  This is a combo box for displaying the currently used rule profile, configuring a new rule profile and activating an existing rule profile. Depending on the caller, the call time and the user presence settings a rule profile defines to which device incoming calls are routed.
- **menu**
  This menu enables the user to access the general settings of the web interface as well as to configure the voicemail box and the rule interpreter tool.

2.4.1 Pearl menu

You invoke the Pearl menu via the adjoining icon. It contains the following options:



- **Status Information**
- **View**
- **Personal Settings**
- **Help...**
- **About**

To close the Pearl menu click on once again or click on the **Close** button.

The icon shows the following operating states by means of rotation:

- A new voicemail has arrived in your voicemail box.
- Another OpenScape UC Application user has requested to see your presence status.
- You have not taken a call, for example because of temporary absence.

2.4.1.1 Status Information

Using this option you can invoke the following information with a mouseclick on the right menu area:

- **Missed Calls**
- **Voicemail**

> ***NOTICE:*** This option is available only if the system your are logged in to is configured as voicemail server.

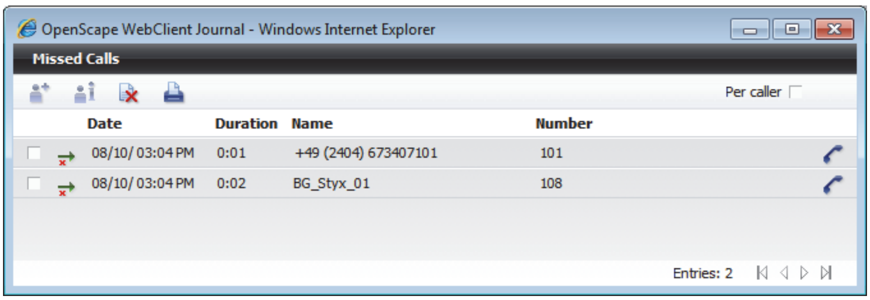
- **Presence Prompting List**

- **Team Promptlist**

> ***NOTICE:*** When the list of **Missed Calls** features a new entry or when you receive a new voicemail, presence or/and team prompt, the icon appears in front of the **Status Information** entry.

Missed Calls

If you could not take a call, the **Missed Calls** option is prefixed with the icon. With a click on **Missed Calls** in the right menu area you can display a list of your missed calls.



> ***NOTICE:*** If the **Missed Calls** function window is currently not open in the workspace, the information is displayed in a separate dialog. If the function window is currently displayed in the workspace, a briefly pulsating **Missed Calls** function window shows where to find the desired information.

The **Missed Calls** function window or dialog provides the journal for your missed calls.

The toolbar of this function window lets you reach the following features:

- **Integrate subscriber in the address book**
  If you want to transfer the contact data of a call to your contact list, select the corresponding call from the list of missed calls. Then click on . The contact input mask opens with the contact information already known. If required, supplement the information and click on **OK** to store the data in your contact list.

- **Display contact information**
  If you want to see the available contact information of an entry selected in the missed calls list, click on . The **Lookup Person** dialog opens.

  > ***NOTICE:*** You can reach the **Lookup Person** dialog via the following function windows by clicking on or : **Journal**, **Contacts**, **Missed Calls**, **Voicemail Box**, **Conferences** and **Directory Search**.

  The following figure exemplifies this.

  In the **Lookup Person** dialog you find the following features in addition to the displayed contact information:

  – **Change address book entry**
  Click on if you want to edit the contact entry. The contact entry mask with the available contact data opens.

  – , , , **Call**
  Click on the icon that matches the desired phone number to set up a connection to this device.

  – , **Send e-mail**
  Click on one of the two depicted icons to send an e-mail to the contact.

  – **Send instant message**
  Click on if you want to send an instant message to the selected person.

  – **Open a note**
  Click on to add a note to the contact or journal entry.

- **Delete journal entries**
  To delete a journal entry, select the corresponding entry. Then click on . If you want to delete several journal entries simultaneously, select the corresponding entries and click on . You can make a selection via **[Ctrl]** + clicking the journal entry or by activating the check box that precedes the relevant journal entry.

  > ***IMPORTANT:*** If no single journal entry has been selected, all journal entries are deleted when you click on .

- **Print journal entries**
  If you want to print the complete journal information, click on . The journal information is printed out in table form on your preconfigured printer.
- **Adjust the time**

  > ***NOTICE:*** This icon is displayed in the **Journal** function window only if a **Mobile time zone** has been defined in the **General settings** dialog under **Common > Appearance**.

  This is useful when you are in a different time zone, working with the program from there. The event time is then displayed in local time.
- **Per caller**
  Setting this check box determines that only one journal entry is displayed per caller. If a caller tried to reach you several times, only the last attempt will be logged.

Under the toolbar of this function window you find the table header for the journal entries. By clicking the column description you can sort the journal entries by **Date** or **Name**.

A **Missed Calls** journal entry contains the following elements (from left to right):

- A check box to select entries for editing
- - Show the status **"Missed Call"** of the relevant call
- **Date** and **Time** when the missed call occurred
- **Name** of the caller

  > ***NOTICE:*** The name can only be displayed if it is contained in the contact list or global address book.

- **Number** of the caller
- Display contact information about the selected journal entry. When you click on this icon, the **Lookup Person** dialog with the subscriber's contact data (if available) opens.
- or Enables initiating an immediate return call to the displayed phone number or to another phone number of the subscriber. You can access the additional phone numbers of a user by clicking on the icon flagged with an additional small triangle. The journal row is then enlarged and shows all phone numbers under which this subscriber can be reached.

Voicemail

If a new voicemail has arrived in your voicemail box, the **Voicemail** option is preceded with the icon. With a click on **Voicemail** in the right menu area you can display the list of received voicemails.

> ***NOTICE:*** If the **Voicemail Box** dialog issues the message: "Connection to Voicemail server is not configured!", please consult your system administrator so that he/she can solve the problem.

> ***NOTICE:*** If the **Voicemail Box** function window is currently not open in the workspace, the information is displayed in a separate dialog. If the function window is currently displayed in the workspace, a briefly pulsating **Voicemail Box** function window shows where to find the desired information.

The toolbar of this function window lets you reach the following features:

- **Delete journal entries**
  To delete a journal entry, select the corresponding entry. Then click on . If you want to delete several journal entries simultaneously, select the corresponding entries and click on . You can make a selection via **[Ctrl]** + clicking the journal entry or by activating the check box that precedes the relevant journal entry.

  > ***IMPORTANT:*** If no single journal entry has been selected, all journal entries are deleted when you click on .

- **Save a voicemail entry locally**
  If you want to locally save a received voicemail, select it in the journal and click on . A directory selection dialog opens in which you can specify the storage location and the voicemail name. After you have locally saved the voicemail, it is still available also after removing it from the **Voicemail Box**.

Under the toolbar of this function window you find the table header for the voicemail entries. By clicking the column description you can sort the voicemail entries by **Date** or **Name**.

A voicemail entry in the **Voicemail Box** contains the following elements (from left to right):

- A check box to select voicemails for playing or deleting.
- The status of the respective voicemail:
  - – - The voicemail has not been played yet,
  - – - The voicemail has been played.
- Date and time of the voicemail's arrival.

- The originator's name.

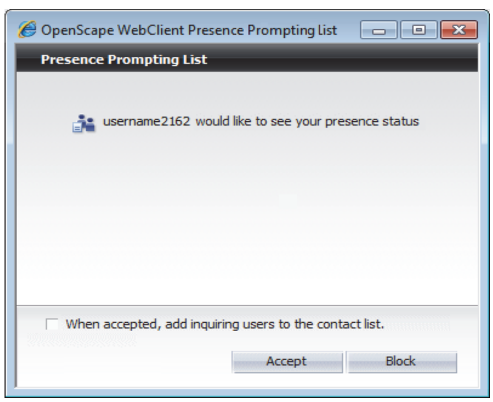
> ***NOTICE:*** The name can only be displayed if it is contained in the contact list or global address book.

- - Click on this icon to start playing the voicemail either by telephone or sound card (via Windows Media Player).
- or Enables initiating an immediate return call to the displayed phone number or to another phone number of the subscriber. You can access the additional phone numbers of a user by clicking on the icon flagged with an additional small triangle. The journal row is then enlarged and shows all phone numbers under which this subscriber can be reached.

Presence Prompting List

The **Presence Prompting List** enables accessing requests sent by other OpenScape UC Application users who wish to see your presence status. A presence prompting is automatically generated when another OpenScape UC Application user has entered your contact information in his/her address book.

If the icon precedes the **Presence Prompting List** option, new requests by OpenScape UC Application users who wish to see your presence status are pending. A presence prompt may look like the following one:



The name of the prompting person is displayed in the middle section of the dialog.

Via the **When accepted, add inquiring users to the contact list** option users can decide whether or not the inquiring person is automatically to be integrated in the contact list.

> ***NOTICE:*** You can activate or deactivate the option **When accepted, add inquiring users to the contact list** also via the **main menu > menu > General ... > Presence > Access Control List**. After a confirmation prompt that you can answer with yes or no, your setting will be copied for the next presence requests.

You can accept the request with a click on the **Accept** button. The corresponding contact entry is moved to the **These users are allowed to see your presence status** list.

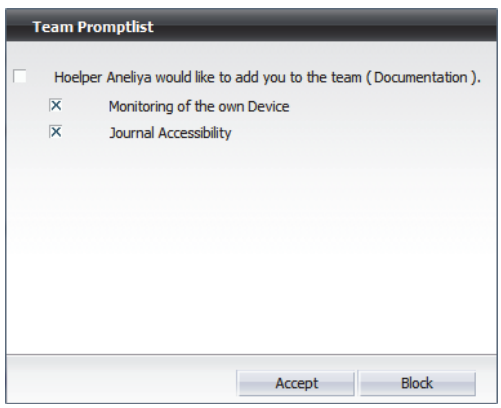
You can reject the request with a click on the **Block** button. The corresponding contact entry is moved to the **These users are not allowed to see your presence status** list.

> ***NOTICE:*** Via the main menu **menu > General ... > Presence tab > Access Control List tab** you can display the list of users who may see your presence status and of those who may not receive presence information from you.

Team Promptlist

The **Team Promptlist** gives you access to the prompts sent by other OpenScape UC Application users who wish to integrate you as member in a team. A team prompt is generated automatically when another OpenScape UC Application user who has team administrator privileges has invited you to join his/her team.

If the icon appears in front of the **Team Promptlist** option, new prompts by OpenScape UC Application users are pending. Such users wish to monitor your telephone status or/and be allowed to access your journal entries. A team prompt may look like the following one:



The **Team Promptlist** may contain one or several prompts. Each prompt contains the name of the prompting person and the team you have been invited for to join. Furthermore, you can configure for each team separately whether or not the other team members may monitor the status of your phone or/and access your journal entries.

The **Monitoring of the own Device** option lets the user give his/her consent to team members accepting calls on his/her behalf in his/her absence.

By enabling/disabling the **Journal Accessibility** option, the user can allow/ disallow team members to access his/her journal entries.

You can accept the request with a click on the **Accept** button.

NOTICE: You must place the tick to the left of the prompting user's name for accepting the prompt.

You can reject the request with a click on the **Block** button.

NOTICE: You must place the tick to the left of the prompting user's name for rejecting the prompt.

2.4.1.2 View

The **View** function enables fast access to the following function windows:

- **Call Control**
  With a click on this menu entry in the right area of the **Pearl** menu you open the **Call Control** function window. This window displays incoming as well as outgoing calls. It opens automatically as soon as you initiate a call or are being called by another subscriber.
- **Contacts (advanced)**
  With a click on this menu entry in the right area of the **Pearl** menu you open the **Contacts** function window. This window lists your contacts. From here you can reach your contacts by phone, e-mail or instant messaging. You can also add new contacts to your address book and edit existing contact information. Furthermore, it is possible to start Ad-hoc conferences with selected contacts and to create, edit and start Meet Me conferences.
- **Instant Messaging**
  With a click on this menu entry in the right area of the **Pearl** menu you open the **Instant Messaging** function window as separate window. The Instant Messaging window enables you to send text messages to OpenScape UC Application users who are currently online. You can also receive such messages from other OpenScape UC Application users. Delivery takes place directly when sending the message so that your colleague may react and answer immediately.
- **Conferences**
  With a click on this menu entry in the right area of the **Pearl** menu you open the **Conferences** function window as separate window. This function window contains a list of all conferences you have created, of all active conferences and/or of all conferences you have been added to as participant. From here you can create a new Meet Me conference, remove selected conferences from the conference list (only if you are the creator), and edit and start them.

- **Directory Search (advanced)**
With a click on this menu entry in the right area of the **Pearl** menu you open the **Directory Search** function window as separate window. In the Directory Search function window you can access your company directory, the OpenScape UC Application user directory, and your private contacts to search for contact names.
- **Journal (advanced)**
With a click on this menu entry in the right area of the **Pearl** menu you open the **Journal** function window. This window logs all of your incoming and outgoing calls, even if you are offline.

> ***NOTICE:*** If one of these function windows is currently displayed in the workspace, a briefly pulsating function window shows where to find the desired information.

2.4.1.3 Personal Settings

- **Presence/Device Mapping**
A click on **Presence/Device Mapping** opens the **General Settings** dialog with the **Preferences** tab already selected for presence options. Thus you can quickly access your presence status preferences.
- **Presence Access Control**
A click on **Presence Access Control** opens the **General Settings** dialog with the **Access Control List** tab already selected. Thus you can quickly access the administration of the users who are allowed to view your presence status.
- **Tell-Me-When**
Tell-Me-When is a feature exclusively applicable with OpenScape UC Application contacts. You can use this feature to have your client perform actions or to receive a notification as soon as your desired conversational partner is available again. A click on the **Tell-Me-When** option under the Personal Settings of the **Pearl menu** displays a list of the active *Tell-Me-When* entries.
- **Devices**
A click on this **Pearl** menu option opens the **General Settings** dialog with the **Devices** tab already selected. Thus you can quickly access the administration of your communication devices to e.g. add new devices, change device definitions or delete devices no longer required.
- **Add to Favorites**
Click on this menu entry to add the current URL of your OpenScape Web Client to your internet favorites list. Thus you can open the OpenScape Web Client directly via your web browser's favorite list.

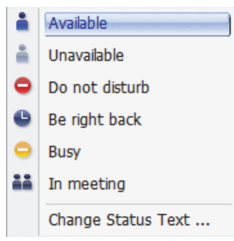
2.4.1.4 Help...

A click on **User manual PDF** in the menu area on the right opens the user manual for the program in a separate window.

2.4.2 Presence Display

In the **main menu** next to the name of the currently logged-in user you find the presence display combo box . On the combo box you see the icon of the respectively set presence status.

When you click on the combo box, the following menu opens. In this menu you can set your current presence status. This status is then indicated by an arrow.



Only if you have allowed an OpenScape UC Application user to view your presence status, the status will be displayed for this user. Your presence status is then displayed in the contact lists and the directory search.

> ***NOTICE:*** When an OpenScape UC Application user integrates another OpenScape UC Application user in his/her contact list by directory search, he/she sends automatically a presence prompt to this user even if the **Ask <contact name> for the permission to receive presence information?** option is inactive. The user addressed in this way can then use this prompt to decide whether he/she allows the requesting user to see his/her presence status. If, in contrast, a contact is added manually, thus without directory search use, this option is grayed out and unavailable.

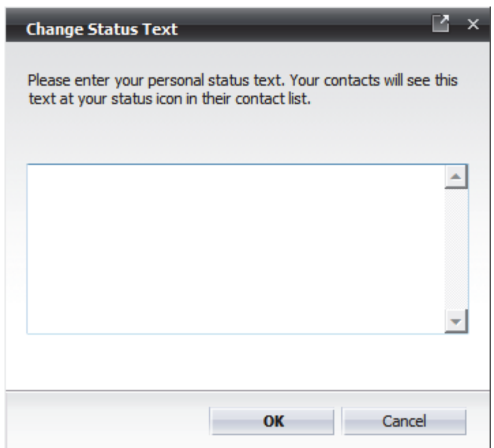
The following presence statuses are available:

- **Available**
  Signal for the other OpenScape UC Application users that you can be reached at your workstation.
- **Unavailable**
  Signal for the other OpenScape UC Application users that you cannot be reached at your workstation.
- **Do not disturb**
  Signal for the other OpenScape UC Application users that you can be reached at your workstation but do not wish to be disturbed.

- **Be right back**
  Signal for the other OpenScape UC Application users that you have left your workstation for a short period.
- **Busy**
  Signal for the other OpenScape UC Application users that you can be reached at your workstation but only want to be disturbed in urgent cases.
- **In a meeting**
  Signal for the other OpenScape UC Application users that you are currently in a meeting and cannot be reached.

> ***NOTICE:*** Do not forget to always set your current presence status so that your colleagues always know whether or not they can contact you.

The menu provides the **Change Status Text...** option in addition. Selecting this option opens the following dialog:



Here you can enter a personal status text. This text is independent from the current presence status and appears also after the presence status has changed. The status text is shown to the other OpenScape UC Application users as quick info when they position the mouse pointer on your status icon.

2.4.3 Device Display

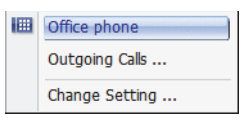
Next to the presence display combo box in the **main menu** you find the device display combo box. Move the mousepointer over the combo box to display a quick info showing the device name and the device address (phone number) of your device currently set for incoming calls.

> ***IMPORTANT:*** You cannot configure/select a device already monitored by another CSTA application, for example *OpenScape Contact Center*.

> ***IMPORTANT:*** The members of a Multi-Line Hunt Group (MLHG) must not configure a named device list as preferred device for incoming and/or outgoing calls.

> ***IMPORTANT:*** The members of a Multi-Line Hunt Group (MLHG) must not configure their voicemail box as preferred device for incoming and/or outgoing calls.

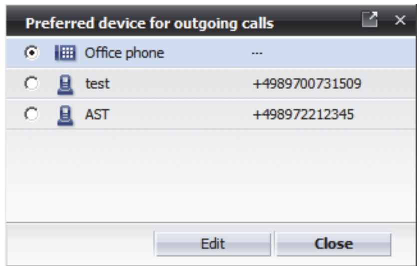
When you click on the combo box, the following menu opens for selecting the preferred device or configuring a call forwarding.



The device currently used is indicated by an arrow.

- The **Change Setting** menu option lets you directly perform the settings for the rule profile, the *one-number service* – display of your phone number on the calling or called subscriber's side independently from the device used – as well as configure a call forwarding and add further devices to the device list.

- A click on the **Outgoing Calls** menu option opens the following dialog for you to quickly set your preferred device for the *one-number service* to make outgoing calls.



Set the radio button of the device you want to use for outgoing calls. A click on the **Close** button saves your setting and the dialog closes.
You can use the **Edit** button to edit the settings of your existing devices or to add a new preferred device. The **General Settings** dialog with selected **Devices** tab opens.

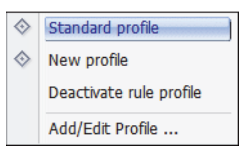
> ***NOTICE:*** If you have configured different devices for in and outbound calls, this is indicated by a red icon on the combo box.

2.4.4 Rule Profile Display

This combo box lets you define routing rules for your inbound calls. With the help of these rules calls are routed to a specific device depending on the caller, the call time and your presence status. The combo box for the profile and rule settings displays whether ( ) or not ( ) a profile is active.

The active rule profile is additionally indicated by an arrow.

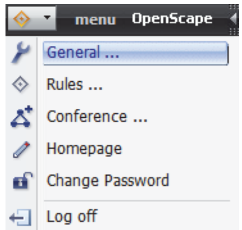
When you click on the display the following menu opens.



This menu allows the following actions: Deactivating the rule profile used, activating a rule profile already defined, and, via the **Add/Edit Profile...** option, creating new profiles with the associated routing rules or editing the routing rules of existing rule profiles.

2.4.5 menu

menu gives you access to the general settings for the user interface.



The following settings can be made:

- **General**
  Select **General** to perform the basic settings for the web interface. In this menu you can use dialogs for defining general parameters and administering addresses.
- **Rules...**
  Select **Rules** to configure a profile and routing rules for rerouting incoming calls to the devices you have specified.
- **Conference...**
  Select **Conference** to open the entry mask for scheduling a conference.
- **Voicemail...**
  Select **Voicemail** to open the configuration pages to set your voicemail parameters.
- **Homepage**
  Select **Homepage** to adjust the OpenScape Web Client interface to your communication requirements. A new window opens in the web browser in which you can structure your workspace or configure further alternative workspaces.

  > ***NOTICE:*** The **Homepage** option is hidden from the user interface compact view.

- **Change Password**
  Select **Change Password** to change your existing OpenScape UC Application password for logging on to the OpenScape UC Application system.
- **Log off**
  Select **Log off** to quit the OpenScape UC Application server.

  > ***NOTICE:*** When you log off from the server, the user name and password will be deleted. To log back in again with the OpenScape Web Client at the system you need to enter the user name and password once more. Both will be stored in the web browser in a cookie when you log on to the server for the first time.

In this way you can update the browser without having to log back on to the system. To ensure this, do not delete the corresponding cookie, neither automatically nor manually.

NOTICE: This menu entry is not available if the *Single Sign-on* feature has been configured for your Windows user account in the OpenScape UC Application system. You find continuative information about *Single Sign-on* in the administrator documentation *OpenScape UC Application V7 Configuration and Administration*.

2.5 Workspace

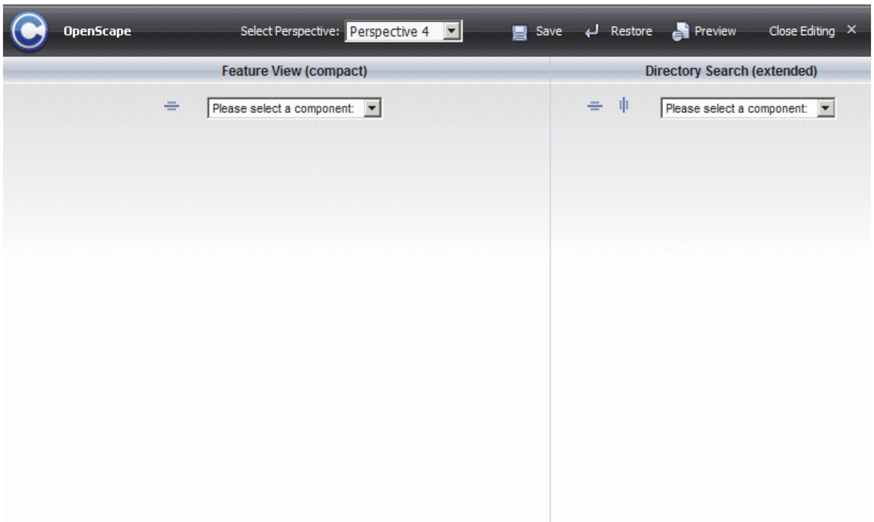
The workspace comprises all features displayed beneath the main menu and provides access to the features of various function windows, which are described in the following sections.

2.5.1 How to Configure your Workspace

You can customize the OpenScape Web Client workspace for optimum use. You configure or change the interface via the **Homepage** feature in the **menu**. You may predefine five different views, e.g. for different operating scenarios.

IMPORTANT: You can configure the workspace via the **Homepage** feature in the **menu** only for the **large** or **small view**.

Click in the main menu on **menu > Homepage** to open a window in which you can select the workspace components, thus the function windows. This window may look like the following one:



NOTICE: In basic state, i.e. without previous configuration, two frames are displayed next to each other (tile frames) and you can specify function windows for both of them.

At the top margin you find the main menu, which provides specific features here for this window.

The following features are available from left to right:

- **Pearl menu**
  The Pearl menu provides here access to the options also contained in the program's main menu.
- **OpenScape**
  The product name
- **Select Perspective**
  You can use this combo box to select a view from five predefined ones.
- **Save**
  A click on this button saves modifications made to the currently displayed view.
- **Restore**
  This button lets you restore the last-saved state of the currently displayed view or the pre-defined view of the basic setting. It opens an interactive dialog. If you click on **Yes** in this dialog, the view is reset to the basic state. We recommend this for the case that you wish to perform a complete reconfiguration of the perspective. If you click on **No**, the view is reset to the one you have saved last. This undoes performed modifications.

- **Preview**
  This button allows checking currently performed modifications before you save them.
- **Close Editing**
  A click on this button closes the window for configuring the workspace. You return to the main window.
- **Divide frame horizontally**
  You can divide a frame horizontally via this icon. This will result in two overlapping frames, which can be configured differently.
- **Divide frame vertically**
  You can divide a frame vertically via this icon. This will result in two tile frames, which can be configured differently.
- × **Delete frame**
  Via this icon you can remove a frame from the workspace.

  NOTICE: You cannot delete the two frames available in basic state.

- **Please select a component**
  You use this combo box to determine the features or function windows for the single frames that you wish to integrate in the workspace. The following features or function windows are currently available for integration in the interface.
  - **Add New Bookmark**
    Opens the dialog for specifying bookmarks for internet pages. These bookmarks can be integrated as windows in the workspace of the selected frame via the Show Bookmarks feature.

    NOTICE: To ensure that the selected internet page is displayed as your own tab, you must specify the complete URL inclusive `http://` or `https://`.

  - ***<Bookmark display name>***
    All internet pages you have pre-defined via **Add new bookmark** are displayed in the combo box of the component selection with the **display name** you have assigned. Thus you can create a pool of frequently

required internet pages that you can directly show as window. The internet page you select here is permanently displayed in the frame that you select for one of the predefined internet pages.

Some internet pages are programmed via *Javascript* in such a way that they automatically occupy the entire browser window when being invoked. The user cannot prevent this behavior and it leads to blocking the access to the OpenScape Web Client user interface.

Test this behavior by enabling the **Preview** icon. The preview window opens. If the internet page occupies the entire window space, close the preview window. Then select another internet page or the bookmark view.

If you have selected such an internet page just the same, you can use the following URL to return to the window for configuring the workspace of OpenScape Web Client :

```
<OpenScape Web Client-URL>/tweb/portal/req?loadOpenScape&edithomepage=true
```

– **Call Control**
  The **Call Control** function window lets you look for and call a contact, shows information about in- and outbound calls and provides telephony features during an active call (conference or phone call).
– **Team View**
  The **Team View** function window shows the member list of the respectively selected team and provides useful features for telephoning in the team. This function window remains empty until you are added to a team as member or have created a team.
– **Journal (all Calls)**
  No matter whether you are logged on or off, the OpenScape UC Application server logs all in and outbound calls in the **Journal** function window. Furthermore, you can initiate connections to logged communication partners from the **Journal**.
– **Missed Calls**
  The **Missed Calls** function window enables fast access to all missed calls and calling logged communication partners.
– **Voicemail Box**
  The **Voicemail Box** function window enables fast access to received voicemails and provides controls for playing them.
– **Journal/Voicemail Box**
  This function window enables toggling the **Journal** (lists all calls) and the **Voicemail Box** (lists all received voicemails).
– **Conferences**
  The **Conferences** function window provides the controls for creating a new conference or for starting a configured conference. If you have a configured web conference connection, you can select whether this connection is to be started at a conference also.
– **Instant Messaging**
  The **Instant Messaging** function window enables sending and receiving instant messages. It also provides an overview of the active chat connections.

- **Contacts (compact)**
  This function window provides a compact view of the contact data of your OpenScape UC Application contact list, i.e. the contact entries are only listed with **Name** and **Number**.
- **Contacts**
  The **Contacts** function window represents your private contact list. You can add single contacts to this contact list manually or import such contacts from various directories and then group them in the list to suit your own requirements. You can also directly call single contacts, edit and remove existing contact data as well as send e-mails and instant messages from the contact list. Furthermore, it is expanded by the (**Go to**) quick-search feature for contact entries.
- **Forward Call**
  The **Forwarding Call** function window enables diverting incoming calls from the office phone to other configured devices.
- **Directory Search (extended)**
  The program supports integrating several directories. In the **Directory Search** function window you can search these directories for specific contacts who you may contact then directly by e-mail or phone. You can then also integrate these contacts in your private contact list.
- **Directory Search**
  In this function window you can look for a contact's second name and subsequently call this person or send him/her an e-mail or instant message.
- **Show Bookmarks**
  The **Bookmarks** function window lists all bookmarks you have created via the **Add new bookmark...** option.
- **Feature View (compact)**
  This option lets you add a function window with variable caption bar or features to the workspace. The caption bar appears as combo box. It allows quickly displaying the other available windows in the workspace.

2.5.2 General Controls

The caption bar of the respective function window or dialog contains icons to influence the window's representation:

- Minimize window to caption bar.
- Re-expand window.
- Display frame or function window in separate window.
- Maximize this frame or this function window in the corresponding workspace column or in the entire workspace (in case of a compact view). The other windows or frames in the column or in the workspace are minimized to caption bar size.
- Display all frames or windows in the corresponding workspace column or in the entire workspace (in case of a compact view) in their original size again.

In the **Journal**, **Voicemail** or **Contacts** function windows you find the table header for the respective entries under the toolbar. With a click on a column description you can reverse the sorting order with reference to the relevant column.

At the bottom margin of the function windows you find among other things operating elements that serve for facilitating the navigation in the corresponding window. Thus, the value next to **Entries** indicates which entries you currently see (for example 1 - 10) and, in brackets, the total number of entries contained in the window. If more entries exist than can be displayed in the list, icons will become active via which you can browse in the respective window. Use the following icons to selectively display list entries:

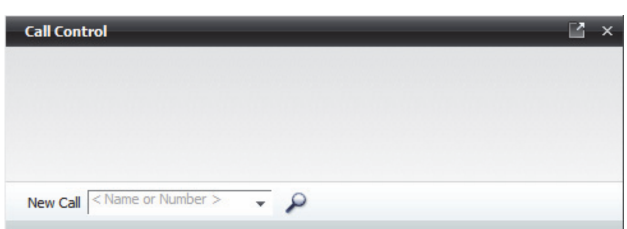
- The next entries are displayed.
  Example: If six entries can be seen in a journal, the next six entries are displayed.
- The previous entries are displayed.
  Example: If six entries can be seen in a journal, the previous six entries are displayed.
- The beginning of the list is displayed in the function window.
- The end of the list is displayed in the function window.

2.5.3 Call Control

The **Call Control** function window provides features for controlling your phone during an active call (phone call, consultation or conference). The window always opens automatically when you set up a call connection or another subscriber tries to reach your extension.

> ***NOTICE:*** You can display this dialog also via the **Pearl menu > View > Call Control**.

> ***NOTICE:*** If you have closed the **Call Control** function window during a session inadvertently, your connection will not be interrupted. Simply click on the **Pearl menu > View > Call Control** to reopen the **Call Control** window. Alternatively, you can click on in the main menu.



From here you can call a subscriber, no matter whether or not he/she is contained in your contact list.

- Enter a phone number in the **New Call** combo box. Click on to initiate the call.

> ***NOTICE:*** Click on the icon to display a list with the last 20 phone numbers you have dialed. Select the desired number and click on .

- Enter a name in the **New Call** combo box. Then click on to find the specified contact in the configured directories. The **Directory Search** window opens, which lists the search hits. Select the desired contact and click on or . If you can reach the contact under several numbers, select one of them. The connection is being established.

> ***NOTICE:*** If the specified name was found in your own contact list, you see a button that appears directly above the **New Call** input field. A click on this button initiates the call.

In this function window you find the following information:

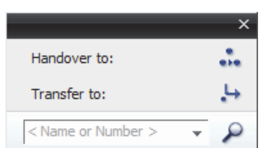
- If possible, the name of the calling or called subscriber.
- The phone number of the calling (if known) or called subscriber.

Depending on the connection type, different controls are available for controlling a connection. These controls are described in detail in the ensuing sections.

2.5.3.1 Inbound Call

If an incoming call is indicated in the **Call Control** function window, the following features are available:

- **Change device/forward incoming call**
  This feature lets you forward the active call either to another device (and you resume the call from there) or to another subscriber. The following dialog opens.



  In this dialog the following options are available:

  – **Handover to**
  A click on this option opens a list of your configured devices from which you can select an entry as forwarding destination.

  – **Forward to**
  This option lets you forward the call to another subscriber. You enter the phone number of the desired contact directly in the input field. Alternatively, you can search all available directories for the desired contact using the search feature .

- **Accept call**
  The connection is being established.

> ***NOTICE:*** This icon is only displayed if you have configured the device your ONS number is assigned to as preferred device when the call comes in. If another device has been chosen from the device list as preferred device, the icon for accepting a call is not available in the **Call Control**. You can accept the call only via the currently configured preferred device.

- **Reject incoming call**
  The call is rejected and the connection setup aborted.

2.5.3.2 Incoming Team Call

Calls destined for other members of your team are signalled to you too in the **Call Control**.

The phone number of the team member that is being called is shown inside the Call Control window. You can pick up such a call with a click on .

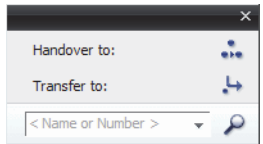
2.5.3.3 Active Call

You can use the following features to control an active call:

- **Request web conference**
  This feature lets you expand an active call to an Ad-hoc web conference.
  If the conversational partner is a contact from your contact list for whom you have specified an e-mail address, the conference invitation is directly sent to this e-mail address. The invitation contains a user-specific internet address for downloading the *OpenScape Web Collaboration* client module. After you have executed the downloaded file, the online session opens.
  If the other participant is not available as contact in your contact list, a dialog opens in which you can enter the e-mail address to which the conference invitation shall be sent. In this dialog you can also determine whether the participant shall be automatically entered as contact in the contact list.
  This dialog is displayed even if no e-mail address has been specified for the contact from the contact list.

> ***NOTICE:*** The icon for requesting a web conference is also displayed with active calls that, for logical reasons, are not extended to a web conference such as connections to a mailbox (for example OpenScape Voice Portal) or to an automatic telephone exchange (for example OpenScape Auto Attendant). Consequently, this icon has no function in such cases.

- **Change device/hand over active call**
  This feature lets you forward the active call either to another device (and you resume the call from there) or to another subscriber. The following dialog opens.

  In this dialog the following options are available:
  – **Handover to**
    A click on this option opens a list of your configured devices from which you can select an entry as forwarding destination.
  – **Transfer to**
    This option lets you forward the call to another subscriber. You enter the phone number of the desired subscriber directly in the input field. As alternative, you can search all available directories for the desired contact using the search feature.
- **Set active call to "on-hold"**
  Via this feature you hold the active call.

  > ***NOTICE:*** If you operate the OpenScape Desktop Client with a connection to a HiPath 4000 , this function is unavailable.

- **Pick up held call**

  > ***NOTICE:*** If you operate the OpenScape Desktop Client with a connection to a HiPath 4000 , this function is unavailable.

  You are automatically reconnected to the original caller.
- **Close connection**
  Terminates the active call.

2.5.3.4 Outbound Connection

When you initiate a call, the OpenScape Web Client reacts in accordance to the preferred device you use.

- The system administrator has assigned you the preferred device currently used in the CMP as ONS number (for example the phone number of your office or softphone). The *auto-answer* function for this phone number is active in the PBX (for example OpenScape Voice).
  In this case the connection to the desired conversation partner is set up directly and displayed in the **Call Control** window.

- The preferred device currently used is not configured in the CMP as your ONS number (for example your mobile phone).
  In this case, a connection is set up from the PBX to your currently set preferred device. You need to accept this call. Only then the connection to the desired conversation partner is set up and indicated in the **Call Control**.

After you have initiated a call, the following call control features are available:

- Callback
  - Completion of Calls to Busy Subscriber (CCBS) - enables the user to automate a connection setup to a previously busy target subscriber via the telephone exchange. When you call a subscriber and receive a busy tone, you can click on in the **Call Control** window to activate this service. If the previously busy target subscriber becomes available again, the OpenScape Web Client is informed by the telephone exchange accordingly. The OpenScape Web Client then lets you know by a call signal in the **Call Control** window that the target subscriber is no longer busy. If you accept this return call with a click on , the target subscriber is called by the telephone exchange again.
  - Completion of Calls on No Reply (CCNR) - enables the user via the telephone exchange to automate a connection setup to a target subscriber who does not answer the phone. When the target subscriber is available but does not answer the phone, you can click on in the **Call Control** window to activate this service before hanging up. When the target subscriber hangs up the next time, the telephone exchange informs the OpenScape Web Client accordingly. The program then lets you know by a call in the **Call Control** window that the target subscriber is available. If you accept this call (return call) with a click on , the telephone exchange connects you to the desired target subscriber again.

    NOTICE: If you have initiated a callback from a preferred device that is not your ONS device, the callback will in due course not be indicated on the preferred device but on the device with the associated ONS phone number.

    NOTICE: The CCNR or CCBS feature cannot be used if the callee rejects the call or the telephone exchange of the callee does not support the service.

- **Terminating the connection setup**
  The connection setup is abandoned.

2.5.3.5 Consultation Call

Controls of the held call

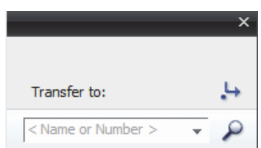
During a consultation call, the following controls are available in the area of the held call:

- **Transfer to new subscriber**
  Transfers the held call to the consultation-call subscriber. Your connection is then automatically cleared.
- **Alternate between**
  Reconnects you to the original caller. The connection to the consultation-call subscriber is held. You can toggle the two conversational partners by repeatedly clicking on .
- **Initiate conference**
  This feature enables transferring the held and consultation call to the conference server and merging them to a Merge Calls conference/Merge Calls video conference with three participants. You can add further participants to the conference.
- **Close connection**
  Terminates the held call.

Controls of the consultation call

During the consultation call, the following call control features are available in the area of the active consultation call:

- **Transfer active call**
  You can use this function to transfer the call to another device from your list of preferred devices for resuming the call from there. The following dialog opens.

  A click on the **Transfer to** button displays the list of your configured preferred devices. You can select a list entry as forwarding destination.
- **Set active call to "on-hold"**

  > ***NOTICE:*** This feature is unavailable in combination with a HiPath 4000.

  Via this feature you hold the active call.
- **Pick up held call**

  > ***NOTICE:*** This feature is unavailable in combination with a HiPath 4000.

  This closes the connection to the consultation-call subscriber. You are automatically reconnected to the original caller.
- **Close connection**
  The consultation call is terminated.

2.5.3.6 Conference Connection

Depending on the system environment and your participant privileges (creator/moderator, invited participant), the Call Control window of an active conference offers different controls.

Depending on the OpenScape UC Application system environment, the **Call Control** of an active conference opens automatically after the conference start or can be opened manually via a URL in the conference notification e-mail.

> ***NOTICE:*** External users invited for a Meet Me conference cannot open the Call Control window.

The **Call Control** window of an active conference displays the following controls, conference and status information:

- Conference name
- Conference PIN
- Features for participants with moderator/creator privileges
- List of participants connected to the conference
  In case of a moderated Meet Me conference with many participants, the number of conference participants displayed in the **Call Control** is restricted for clarity. If the number of participants exceeds a value specified by the system administrator in the CMP (default 15), each participant only sees his/her own entry and a specific number of moderators. The number of visible moderators is also defined by the system administrator (default 15).
  In case of an open Meet Me conference with many participants, the list of participants who are connected to the conference contains only one entry - each participant only sees himself/herself.
- List of participants who have not joined the conference yet
- Name of the currently active speaker is highlighted

> ***NOTICE:*** Depending on your OpenScape UC Application system environment (at least two media servers are available), the **Call Control** window may display another active call in addition to the

ongoing conference. This is a connection to the conference system via which the existing conference is transferred to another media server to avoid a system overload.

NOTICE: Conference participants who can open the Call Control window via a link are not displayed in the **Call Control** when they click on this URL. They appear as conference participants in the **Call Control** of the conference as soon as they dial in.

NOTICE: Depending on the system environment, invited participants may open the **Call Control** via the URL contained in the conference notification e-mail but see nothing but an empty **Call Control** window. The conference is displayed in the **Call Control** as soon as it has been started by the conference creator or moderator.

Moderators and creators can use the following features in the **Call Control** to control an active conference:

- **Starting a Meet Me web conference**
  If you have configured a web conference or were invited for a web conference, you can use this icon to set up the connection to the web conference.
- **Starting a Ad-hoc/MeetNow! web conference**
  Using this feature you can add a web conference session to an active Ad-hoc or MeetNow! conference, which expands every active audio conference to a web conference.
- **Lock/unlock conference**
  This option blocks the conference for other users who want to join in. After you have clicked on the icon it changes to .
- **Unlock conference**
  Releases the conference locking.
- **Mute conference**
  This feature is only available to subscribers with moderator or creator privileges. It interrupts the sound transmission to all conference participants. After you have clicked on the icon it changes to .
- **Cancel conference muting**
  This feature is only available to subscribers with moderator or creator privileges. It cancels the conference muting.
- **End conference**
  This feature is only available to subscribers with moderator or creator privileges. It ends the conference by closing down the connections to the other conference participants.

Invited participants can use the following features in the **Call Control** to control an active conference:

- **Change device and resume active call**
  This feature lets you hand an active call over to another device and resume the call from there.
- **Mute participant**
  It interrupts the sound transmission for a conference participant. After you have clicked on the icon it changes to .
- **Cancel muting a participant**
  It undoes muting a conference participant.
- **Leave conference**
  – Moderated Meet Me conference
    The conference moderator or creator can use this option to leave the conference or to disconnect single conference participants from the conference.
  – Open Meet Me conference
    Enables every participant to leave the active conference.
  – Ad-hoc/MeetNow! Conference
    Enables every participant to leave the active conference. As soon as all participants leave the Ad-hoc or MeetNow! conference, it ends.

> ***NOTICE:*** If you have left the conference via the icon and wish to join in again after a short period, you need to dial into the desired conference again and also specify the conference PIN.

The **Call Control** window opened via the URL in the conference notification e-mail can provide the following information and functions depending on the system environment:

- Highlighted representation of the active speaker
- Conference PIN
- Join an active web conference
- List of current conference participants
- List of participants who have not joined the conference yet.

> ***NOTICE:*** If you are on the road and do not take part in a conference with your office phone (*ONS*) but for example with your cell phone, the connection may be affected by various factors or even aborted. In case of a disconnection you have not initiated yourself, you can dial into the active conference again after a short, pre-defined period. When the connection to the conference server is up again, you are prompted by greeting to push a specific, pre-defined telephone key. By pushing this key you can instantly join the active conference without having to enter the conference PIN once more.

You can use the **Call Control** window to add further OpenScape UC Application or external participants to the conference.

- OpenScape UC Application users
  For example, you can enter the name of the desired OpenScape UC Application participant in the **New Call** combo box and subsequently click on to search all configured directories for the desired contact.
- External users
  You can add an external user to the conference by entering his/her phone number in the **New Call** combo box and enabling the green receiver. This participant will be directly called by the conference system. He/she will not receive a conference notification e-mail because the conference system does not know his/her e-mail address.

> ***NOTICE:*** For adding external participants we recommend using the **Add participant** dialog as it allows specifying an e-mail address for the desired participant. You reach this dialog with a click on in the **Modify conference** dialog.

2.5.3.7 Controlling Conferences by Telephone Hotkeys

As OpenScape UC Application user you can control an active conference also by pushing hotkeys on your configured preferred device. The telephone keys are used for transmitting control commands to the system by sending DTMF tones.

> ***NOTICE:*** The administrator can deactivate the operating menu by configuration. Furthermore, he/she can change the assignment of commands to the single keys. In case of doubt, have the menu options announced via * * .

You control a conference with the keys of your configured preferred device by entering two key commands. This prevents disruptions caused by a telephone key pushed inadvertently.

> ***NOTICE:*** The administrator can deactivate this behavior by configuration, so that you do not have to push the respective first key.

Control commands

You can use the following key commands for controlling a conference:

- * * **Prompt menu**
  The available menu options are announced to you.
- * 2 **Lock/unlock conference**
  Once the conference has been locked, no further participants may dial in. Pushing this key once more undoes the restriction.

- `*` `3` **Mute self**
  Via this key you can temporarily deactivate the microphone of your telephone. The conference connection is maintained. Pushing this key once more reactivates the microphone.
- `*` `4` **Mute conference**
  This feature mutes all microphones of the conference participants. Only the voice signal of the conference participant who triggers this function is still transmitted to all conference participants.
- `*` `5` **Initiate device handover**
  This function allows you to change the device you use in the conference. After you have pushed this key, enter the phone number of the device you want to switch to. You need to complete the phone number entry with the `#` key. For further proceedings, please follow the voice prompts.
- `*` `9` **Toggle music-on-hold**
  If you currently are the only conference participant and hear music-on-hold, you can push this key to switch the music off. Pushing this key once more reactivates the music-on-hold.

Control commands of a video conference

You can use the following key commands during a video conference in addition to the above control options of an audio conference by default.

- `0` `0` **Open operating menu**
  Opens the operating menu for controlling a video conference.
- `8` `8` **Display participant list**
  Enabling this key displays a list of all conference participants in the **Video** window. The participants are listed with their names or phone number, for example. Pushing this key once more hides the participant list again.
- `8` `7` **Enable/disable info bar**
  Via this key you display an info bar in the **Video** window. This bar may contain information about the number of connected video or audio participants, the muting status (muting on or off) as well as the conference status (locked/unlocked).
  Pushing this key again hides the info bar.
- `8` `3` **Show/hide connection information**
  When you push this key, specific connection information such as the required bandwidth for enabling the image transmission to the client is displayed in the **Video** window. To hide the connection information, push this key again.
- `8` `9` **Switch to tiled layout**
  The transmitted video sequences of all conference participants are consequently displayed on the video screen in tiles of the same size.
- `8` `6` **Switch to "active speaker" layout**
  The video sequence of the currently active speaker appears then highlighted in a blue frame and on a larger tile.

- 8 5 **Switch to "active-speaker-only" layout**
  Only the video sequence of the currently active speaker is then displayed on the video screen.
- 9 8 **Switch own image on/off**
  Your own video sequence is displayed in addition to the video sequences of the other video conference participants. If you invoke this function once more, displaying your own video sequence will be disabled to restore the defaulted state.

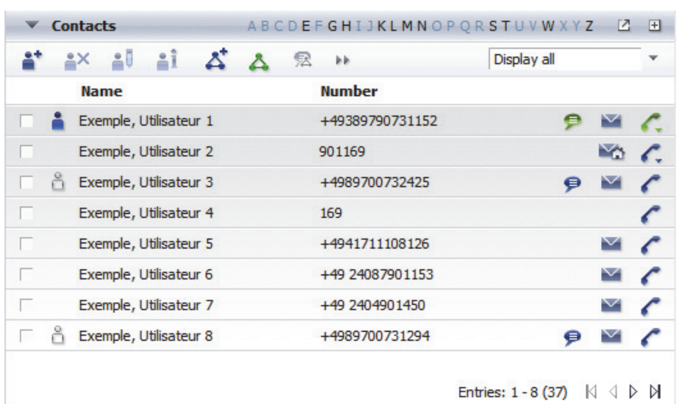
> ***NOTICE:*** The administrator can change the assignment of commands to the single keys. If the above default key assignments are not valid for your system, please consult your system administrator.

2.5.4 Contacts

The **Contacts** function window contains your private address book. You can use it to manage your private contact data. The data of all contacts you have entered in the contact list either directly or by directory search is displayed here.

Compact view

You reach the compact view of the **Contacts** function window via the main menu **menu > Homepage** by adding it as component to one of the workspace views via the **Contacts (compact)** option.



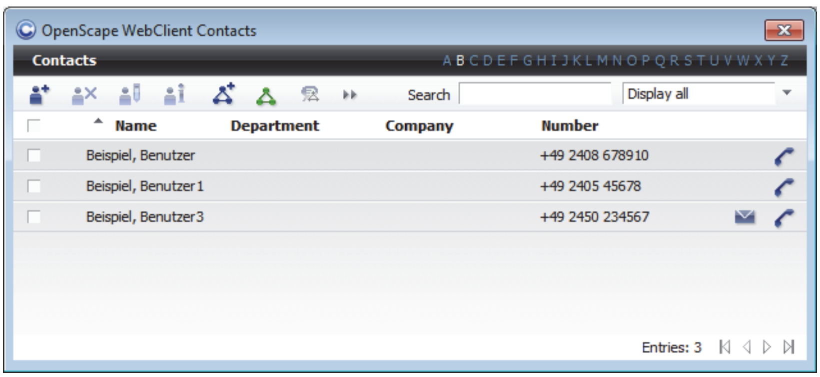
> ***NOTICE:*** Alternatively, you can open the compact view of the **Contacts** function window via the **Pearl menu > View > Contacts**. With a click on ↗ in the compact view you can have the advanced view of the **Contacts** window displayed as separate window.

The data of all contacts you have entered in the contact list directly, from a directory or via an address group is displayed here. The alphabet in the caption bar enables fast access to the contact data of the contact entries the names of which begin with a letter represented in black.

The right portion of the caption bar in this view displays an alphabet. Using this alphabet you can quickly display contact entries that feature a specific initial letter. If an initial letter matches at least one entry, the initial letter in the alphabet appears in black and can be selected. Click on the initial letter of the contact name you are looking for. The entries in the contact list are then shown from the contacts that begin with this letter.

Extended view

You reach the extended view of the **Contacts** function window via the main menu **menu > Homepage** by adding it as component to one of the workspace views via the **Contacts** option. In addition to the contact information represented in the compact view it displays the contact attributes **Department** and **Company**.



Furthermore, you find an entry field with the additional feature **Go to** in the toolbar of this dialog. You can use this feature for navigating in the contact entries, for example if not all entries can be displayed in the window view. Enter a name in the **Go to** input field as criterion to search for contact data and push the **return key** (**Enter**). The contact entry with the entered name appears on top in the contact list.

2.5.4.1 Information in the “Contacts” Function Window

The **Contacts** function window displays the following information for each listed contact (from left to right):

- A radio button for selecting the entry

> ***NOTICE:*** On the left-hand margin of the area under the toolbar of the **Contacts** function window you find the **Select/Deselect all entries** radio button. It lets you select all contact entries in your contact list for synchronizing them with the global company

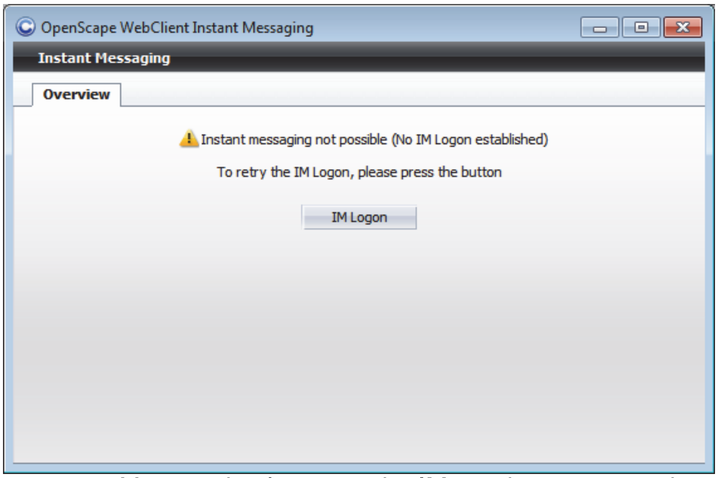
contact directory, for example. In addition, you can use this radio button to select all contacts in a contact group to for example start an Ad-hoc or IM-conference with them.

- The presence icon of the relevant contact:
  - **Available**
  - **Unavailable** or the contact does not allow monitoring his/her presence status or presence information cannot be displayed because the team member has not yet accepted the team prompt.
  - **Do not disturb**
  - **Be right back**
  - **Busy**
  - **In a meeting**
  - Presence information is invisible or not displayed
- The name of the contact,
- The department of the company that employs the contact (**Contacts** only)
- The company that employs the contact (**Contacts** only)
- The contact's business number,
- An instant-messaging (IM) icon for opening a chat with this contact:
  - The IM-status of the contact is *Online*. The contact has rejected your presence request or not replied to it yet.
  - The IM-status of this contact is *Online*. The contact is logged in at the system and at the instant-messaging service. You can immediately start a chat with this contact.

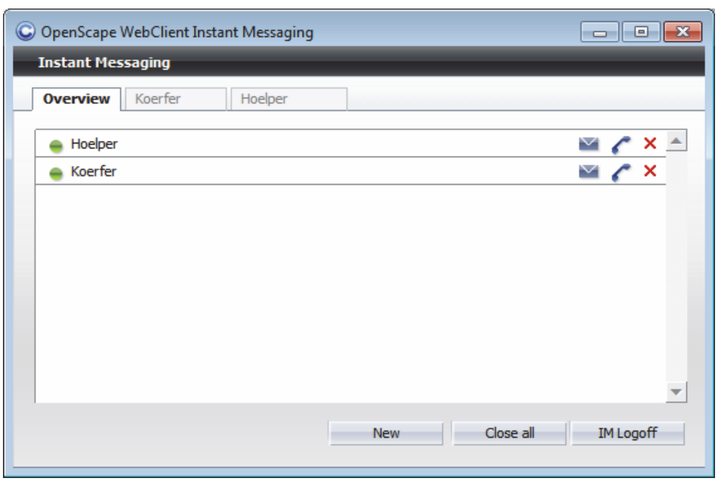
– The IM-status of this contact is *Offline*. The contact is not logged in at the system or at the instant-messaging service.

If you are logged in at the IM-service you can send an instant message to a contact only if his/her IM-status is *Online* or *Unknown*.

If you have logged out of the IM-service and try to start a chat with a contact, the following dialog opens:



You need to log on to the IM-service to start a chat. After you have logged on to the IM-service, the dialog switches automatically to the following view (example):



- The icon for sending an e-mail to this contact.
  A click on this icon opens the e-mail form of your default e-mail application for sending an e-mail to this contact.

> ***NOTICE:*** An e-mail address must exist in the contact information for this purpose.

- A receiver icon for initiating a call to this contact.
  – - The contact is ready for a voice call. However, it is possible that the connection may not be established for technical reasons or that the contact is not reached.

– - See the function description for . This contact has been assigned various phone numbers. With a click on the small triangle you can display all configured phone numbers. Selecting one of them (office, home, mobile or video) determines the device for the call to be made.

– - The maximum number of active connections for the desired contact has been reached or exceeded. It is not possible to establish a connection to the contact.

– - See the function description for . The small triangle means that several phone numbers are available for the person.

– - There is no presence information available for the contact; thus, it is not possible to specify whether or not the contact can be reached by phone.

– - The contact has been assigned various voice devices. However, there is no presence information available for the contact at the moment; thus, it is not possible to specify whether the he/she can be reached by phone or not.

NOTICE: You can initiate a call via these icons if you have already established a connection, to hold for example a consultation call or initiate a conference.

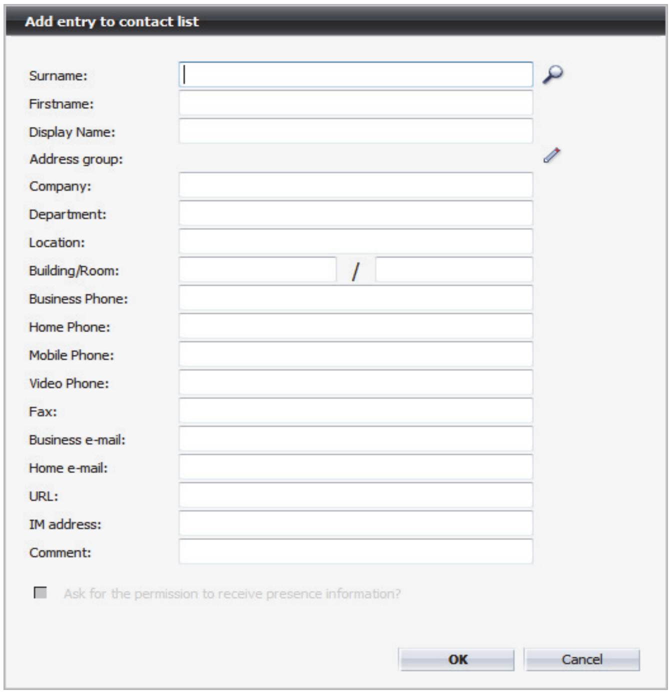
2.5.4.2 Controls in the "Contacts" Window

The following features are available to you in the toolbar of the compact as well as extended view of the **Contacts** window.

NOTICE: Some features will not become active until you select a contact entry in the contact list.

- **Create new contact entry**

  Click on to create a new contact entry. The contact entry mask opens.



- **Delete contact entry**

  To delete a contact entry, select it. Then click on . If you want to delete several user entries simultaneously, select the corresponding entries and click on . You can make your selection by pushing the **[Ctrl]** key and simultaneously clicking the contact entry, or by clicking the radio button that precedes each contact entry.

- **Change contact entry**

  To edit a user entry, select the corresponding entry and click on . The contact input mask with the already available data opens.

  The settings you can perform in this dialog are essentially identical with those in the input mask for a new contact. Both input masks are detailed in the ensuing sections.

- **Display contact entry**
  To view the information available for a contact entry, select the corresponding entry. Then click on . The data that associates this entry is displayed in the separate **Lookup Person** window.

  In the **Lookup Person** dialog you find the following features in addition to the displayed contact information:

  – **Change address book entry**
    Click on if you want to edit the contact entry. The contact entry mask with the available contact data opens.

  – , , , **Call**
    Click on the icon that matches the desired phone number to set up a connection to this device.

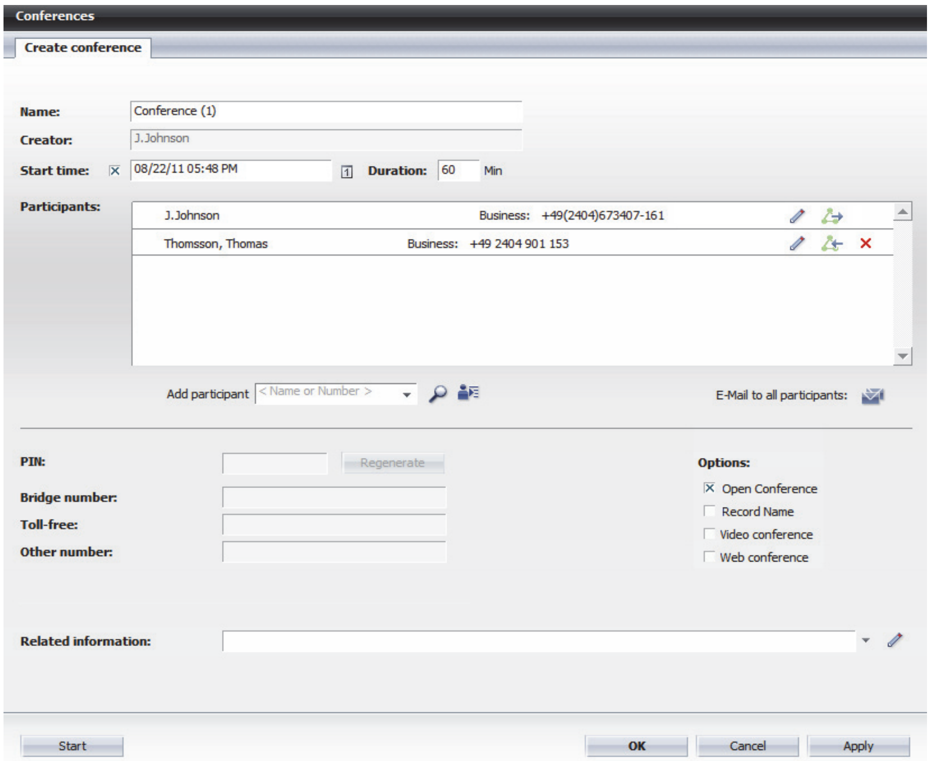
    NOTICE: A click on sets up a pure audio connection because OpenScape Web Client does not support the video functionality of the OpenScape UC Application.

  – , **Send e-mail**
    Click on one of the two depicted icons to send an e-mail to the contact.

  – **Send instant message**
    Click on if you want to send an instant message to the selected person.

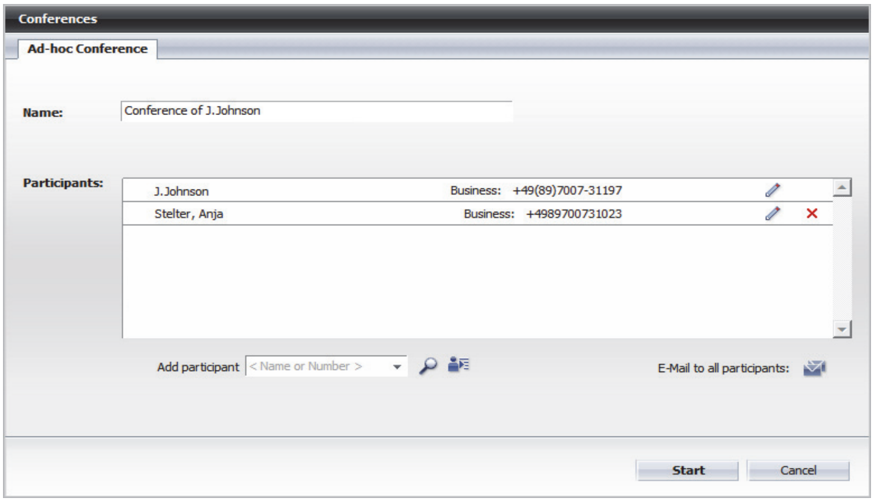
  – **Open a note**
    Click on to add a note to the contact or journal entry.

- **Configure conference**
  If you want to configure a new Meet Me conference, select the desired conference participants from your contact list and click on . The **Create conference** dialog opens.



The participants selected in the contact list have already been adopted as conference participants.

- **Initiate conference**
  If you want to initiate an Ad-hoc conference, select the desired conference participants from your contact list and click on . The following dialog opens:



> ***NOTICE:*** Ad-hoc conferences support audio connections only.

- **Start an instant-messaging conference**
  If you want to initiate a chat conference, select the desired participants from your contact list and click on . The **Instant Messaging** dialog opens. The selected contacts are invited for the chat conference.
- **More functions**
  After a click on this icon, you can choose the following features from a list:
  – **Set Tell-Me-When**
    Select this option to activate the *Tell-Me-When* function for the selected contact.
  – **Edit Tell-Me-When**
    This option is only available to you after you have selected a contact with active *Tell-Me-When* function. You can use this option to change the *Tell-Me-When* settings for the selected contact.
  – **Delete Tell-Me-When**
    Select this option to deactivate the active *Tell-Me-When* function for the selected contact.

> ***NOTICE:*** This option is only available in the selection list if you have activated the *Tell-Me-When* function for at least one of your OpenScape UC Application contacts.

  – **Show all Tell-Me-When ...**
    You can use this option to display an overview of all active *Tell-Me-When* functions.

- **Print ...**
  Select this feature to print the complete contact list. The contact information is printed out in table form.
- **Store Local ...**
  Select this feature to save the complete contact list with all data locally on your computer. A new window opens that displays your contact data in tabular format. Click on the **Save** button in this window. The directory selection dialog of Windows opens. Select here the directory as well as the file type and specify the file name under which the address list is to be stored.
- **Synchronize**
  Use this feature to update one or several contact entries. Select the corresponding contact(s) in the list. Then select the **Synchronize** feature.
- **Settings ...**
  Select this feature to open the configuration dialog for the address data. In there you can import and export address data as well as define new address groups.

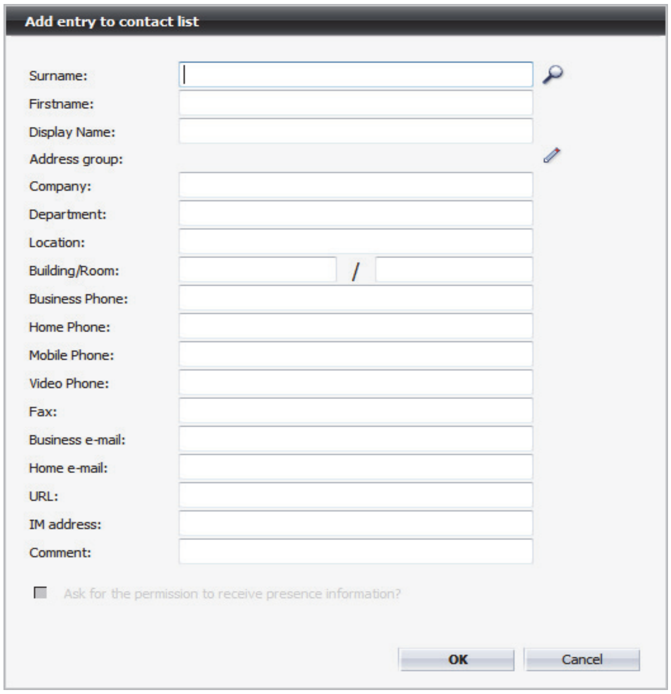
• **"Filter by address group" combo box**
  Address groups enable structuring the contact list content to provide a clear overview. You can assign an attribute to a contact entry, which labels the contact as member of a group you have specified. For example, you can group your contacts according to company membership, departments or as private. Via the contact list you can then selectively access these groups.
  By clicking on this combo box in the toolbar you can have the contacts displayed filtered by an address group. You can also create new groups and delete or rename existing address groups.
  The following options are available:
  - **Display all**
    shows all contacts in alphabetic order, either ascendingly or descendingly,
  - ***<Address group names>***
    and the address groups you have already created.
  - **Edit**
    A click on this option opens the configuration dialog for the address groups. In this dialog you can define new address groups and rename or delete existing ones.

  If you restrict the display of your private contact list to one address group, the shortlist for the **<Name or Number>** input field in the main menu displays only contacts found in the selected address group.

• Radio button **Select/Deselect all entries**
  On the left-hand margin of the area under the toolbar of the **Contacts** function window you find the **Select/Deselect all entries** radio button. It lets you select all contact entries in your contact list for synchronizing them with the global company contact directory, for example. In addition, you can use this radio button to select all contacts in a contact group to start for example an Ad-hoc or IM-conference with them. Another mouse click on this option cancels the selection.

2.5.4.3 Input Mask of a Contact – Adding a Contact

In the **Contacts** window you find the icon that lets you add a new contact to your contact list. After you have clicked on this icon, the following input mask opens:



In this dialog you can perform the following settings:

- **Surname**
  Here you can enter the last name of the contact with a maximum of 64 characters.

> ***NOTICE:*** If the contact you wish to add is a OpenScape UC Application user, deploy the search function to find the desired user in your global directory and integrate him/her in the contact list.

- **Firstname**
  Here you can enter the first name of the contact with a maximum of 64 characters.
- **Display Name**
  Here you can enter a name with a maximum of 64 characters for the contact displayed in the contact list.
- **Address group**
  If required, assign an **address group** to the contact with a click on and selecting the desired address group.
- **Company**
  Here you can enter a company name with a maximum of 64 characters.

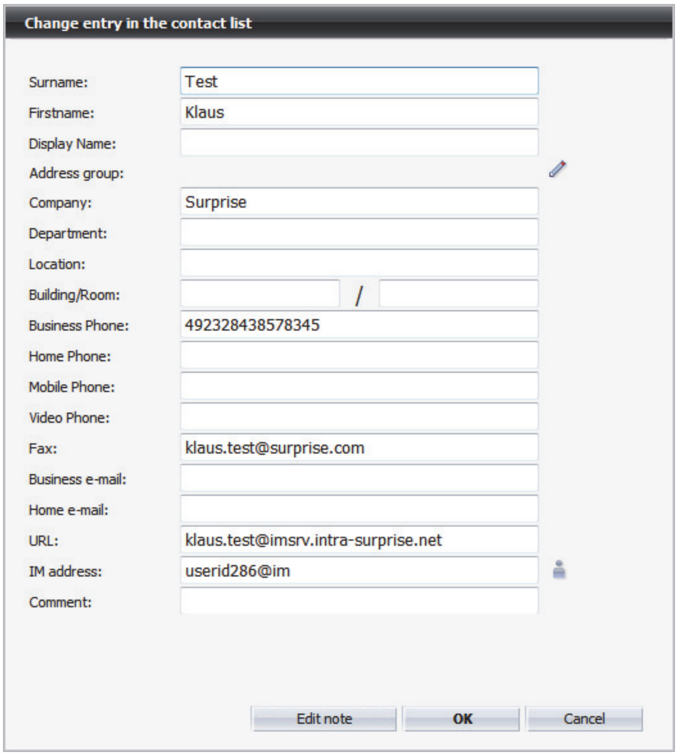
- **Department**
  Here you can enter a department name with a maximum of 64 characters.
- **Location**
  Here you can enter a location name with a maximum of 64 characters.
- **Building/Room**
  Here you can enter a room number with a maximum of 32 characters.
- **Business Phone**
  Here you can enter a phone number with a maximum of 32 characters.
- **Home Phone**
  Here you can enter a phone number with a maximum of 32 characters.
- **Mobile Phone**
  Here you can enter the number of a mobile device with a maximum of 32 characters.
- **Video Phone**
  Here you can enter the number of a video-compatible device with a maximum of 32 characters.
- **Fax**
  Here you can enter a fax number with a maximum of 32 characters.
- **Business e-mail**
  Here you can enter an e-mail address with a maximum of 64 characters.
- **Home e-mail**
  Here you can enter an e-mail address with a maximum of 64 characters.
- **URL**
  Here you can enter a URL address with a maximum of 64 characters.
- **IM address**
  Here you can enter an instant-messaging address with a maximum of 64 characters.
- **Comment**
  Here you can enter a comment with a maximum of 255 characters.
- **Ask <contact name> for the permission to receive presence information?**
  When you integrate another OpenScape UC Application user in your contact list with help of the directory search, you send a presence prompt to this user automatically, even if this option has not been selected. The relevant user can then deploy this prompt to decide whether or not to allow you monitoring his/her presence status. If, in contrast, a contact is added manually, thus without directory search use, this option is grayed out and unavailable.

With a click on **OK** you can save the performed settings and close the input mask.

With a click on the **Cancel** button you can close the input mask without entering any contact data or saving the performed changes.

2.5.4.4 Input Mask of a Contact – Editing a Contact

In the **Contacts** window you find the icon that lets you edit an existing contact of your contact list. After you have clicked on this icon, the following input mask with the contact's data opens:



In this dialog you can perform the following settings:

- **Surname**
  Here you can enter the last name of the contact with a maximum of 64 characters.
- **Firstname**
  Here you can enter the first name of the contact with a maximum of 64 characters.
- **Display Name**
  Here you can enter a name with a maximum of 64 characters for the contact displayed in the contact list.
- **Address group**
  If required, assign an **address group** to the contact with a click on and selecting the desired address group.
- **Company**
  Here you can enter a company name with a maximum of 64 characters.
- **Department**
  Here you can enter a department name with a maximum of 64 characters.
- **Location**
  Here you can enter a location name with a maximum of 64 characters.

- **Building/Room**
  Here you can enter a room number with a maximum of 32 characters.
- **Business Phone**
  Here you can enter a phone number with a maximum of 32 characters.
- **Home Phone**
  Here you can enter a phone number with a maximum of 32 characters.
- **Mobile Phone**
  Here you can enter the number of a mobile device with a maximum of 32 characters.
- **Video Phone**
  Here you can enter the number of a video-compatible device with a maximum of 32 characters.
- **Fax**
  Here you can enter a fax number with a maximum of 32 characters.
- **Business e-mail**
  Here you can enter an e-mail address with a maximum of 64 characters.
- **Home e-mail**
  Here you can enter an e-mail address with a maximum of 64 characters.
- **URL**
  Here you can enter a URL address with a maximum of 64 characters.
- **IM address**
  Here you can enter an instant-messaging address with a maximum of 64 characters.
- **Comment**
  Here you can enter a comment with a maximum of 255 characters.

Click on the **Edit note** button to add a new note to the contact entry or to edit an existing note.

With a click on **OK** you can save performed settings and close the input mask.

With a click on the **Cancel** button you can close the input mask without saving performed changes.

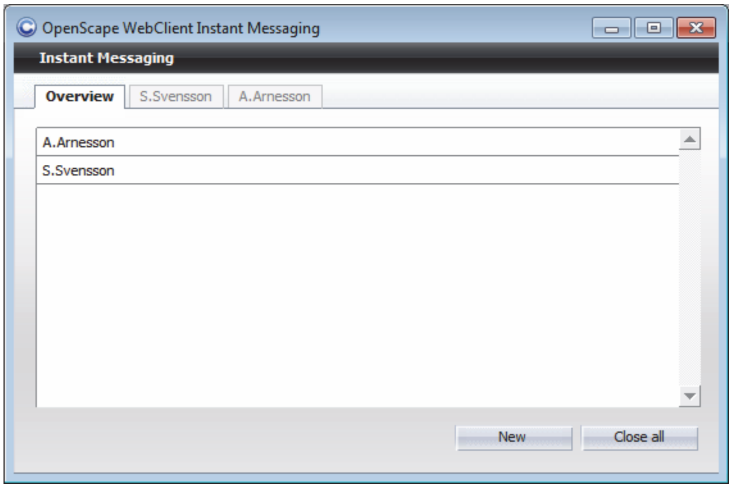
2.5.5 Instant Messaging

The **Instant Messaging** window enables you to send text messages to OpenScape UC Application users who are currently online. You can also receive such messages from other OpenScape UC Application users. If your chat partner is logged in at the system and at the instant-messaging (IM) service, messages are instantly delivered as you send them, so that your colleague may react and answer immediately.

You reach the **Instant Messaging** function window in one of the following ways:

- As separate window via the **Pearl menu > View > Instant Messaging**
- As separate window with a click on , or in the **Contacts** function window

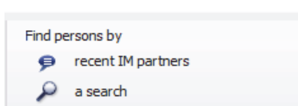
- By selecting the **Instant Messaging** option when you configure the desired view.



The window remains empty, that is, contains only the **Overview** tab until you have initiated at least one chat or have been invited for a chat. From this moment the **Instant Messaging** window does not only contain the **Overview** tab, which lists all active chat connections, but also a tab for each active chat or chat conference.

> ***NOTICE:*** Selecting several OpenScape UC Application contacts in the contact list and a click on in the toolbar of the **Contacts** window enables you to set up a connection to several OpenScape UC Application users simultaneously. This connection is called instant-messaging conference.

You can initiate a new chat via the **New** button. The following tooltip-like window opens for you to select one or several chat partners.



- **recent IM-partners**
  This feature opens a selection dialog displaying your recent chat partners. To invite a person for a chat, select him/her by activating the check box that precedes the respective name entry. A click on the **OK** button closes the selection dialog. A new tab opens in the **Instant Messaging** function window. On this tab you can write an instant message and send it to the selected contact.

- **a search**
  This feature opens the **Directory Search** window. Enter the data of the user with whom you would like to start a new chat in the search form. Click on the **Search** button. The search results are displayed in the lower section. Select the desired person. Then click on the **Add** button in the **Directory Search** dialog or on . The **Directory Search** dialog closes. A new tab opens in the **Instant Messaging** function window. On this tab you can write an instant message and send it to the selected participant.

Alternatively, you can open this window via one of the following actions:

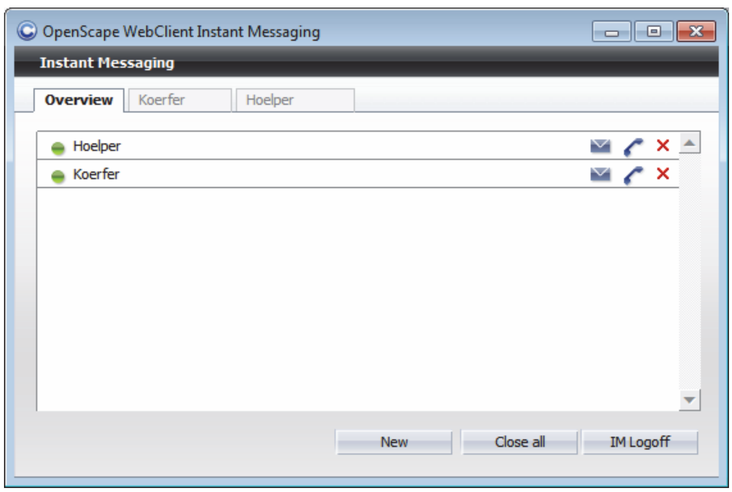
- With a click on , , in the row of the desired chat participant in the **Contacts** function window.
- With a click on in the row of the desired chat participant in the **Directory Search** function window after a performed contact search.
- By clicking the notifier toast displayed at the bottom right margin of the desktop.

The window then contains the **Overview** tab automatically and a tab for each active chat or chat conference.

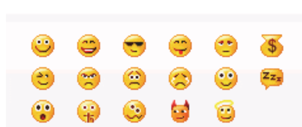
2.5.5.1 Controls in the “Instant Messaging” Dialog

Controls on the tab of an active chat connection

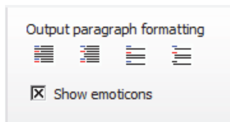
The following operating options are available in the **Instant Messaging** dialog during a chat:



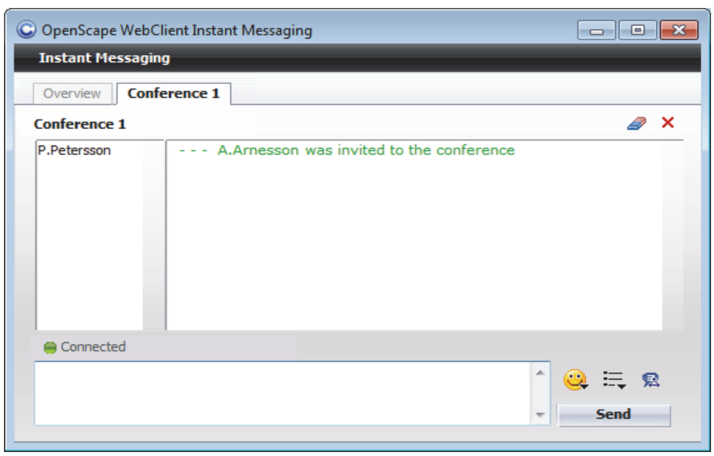
- - Opens the e-mail form of your default e-mail application for sending an e-mail to this contact.
- - Initiates directly a call to the displayed chat partner.
- - Deletes the message text displayed in the text window.
- - Closes the connection to the displayed chat partner.
- - You can insert various emoticons in the text to be sent. After you have invoked the feature, select an emoticon from the list. The selected emoticon will then be added to the text that has already been written in stylized form. When the text is sent, the stylized form is replaced with the respective icon.



- **- Set output format**
  Via this option you can configure how the message text will be displayed. You have the following options for the output format (from left to right):
  – Text formatting as running text starting directly behind the send time.
  – Text formatting as running text indented around the time.
  – Text formatting as running text starting below the line for the send time.
  – Text formatting as running text starting below the line for the send time and indented.
  – Via the **Show emoticons** checkbox you can define whether or not emoticons are displayed in the sent text.



- **- Invite somebody to this chat**
  Clicking on this button opens a dialog in which you can invite additional OpenScape UC Application users to the chat. This initiates a chat conference for which the exchanged messages are displayed to all chat partners.



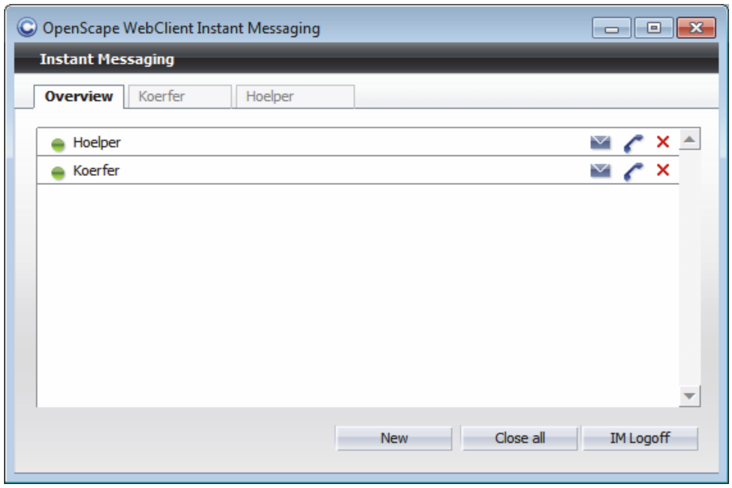
A click on opens a tooltip-like window for you to invite further chat partners. You have the following options:

– **recent IM partners**
This feature opens a list displaying your recent chat connections. Select the persons you would like to invite to the chat conference by ticking one or several check boxes next to the name entries. Click on **OK**. The selected persons are added to the chat conference and the selection list is closed.

– **a search**
This feature opens the **Directory Search** window. Enter the data of the user whom you would like to invite to the chat conference in the search form. Click on the **Search** button. The search results are displayed in the lower section. Select the desired person. Confirm with a click on **Add**. The selected person is added to the chat conference and the **Directory Search** dialog closes.

Controls on the "Overview" tab

A click on the **Overview** tab displays the connection status. Additionally, the tab displays the number of established connections.



You reach the following functions via the **Overview** tab:

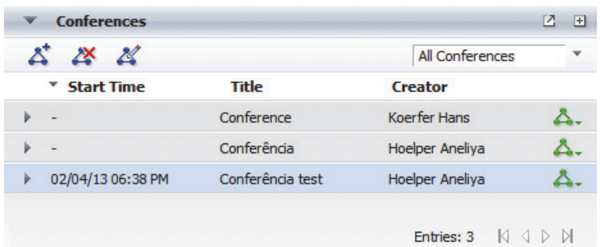
- - Opens the e-mail form of your default e-mail application for sending an e-mail to this contact.
- - Initiates directly a call to the displayed chat partner.
- × - With a click on × you can selectively close single connections.
- **New** button - A click on this button opens a tooltip-like window for you to invite further chat partners. You have the following options:
  - **recent IM partners**
    This feature opens a selection dialog displaying your recent chat partners. To invite a person for a chat, select him/her by activating the check box that precedes the respective name entry. Click on **OK**. The selection dialog closes. A new tab opens in the **Instant Messaging** function window. On this tab you can write an instant message and send it to the selected participant.
  - **a search**
    This feature opens the **Directory Search** window. Enter the data of the user with whom you would like to start a new chat in the search form. Click on the **Search** button. The search results are displayed in the lower section. Select the desired person. Then click on the **Add** button in the **Directory Search** dialog or on . The **Directory Search** dialog closes. A new tab opens in the **Instant Messaging** function window. On this tab you can write an instant message and send it to the selected participant.
- **Close all** button - A click on this button ends all active chats.

2.5.6 Conferences

The **Conferences** function window contains a list of all conferences you have created. Depending on the OpenScape UC Application system environment the following conferences are listed here as well:

- pending conferences you have been invited for
- active conferences you created yourself
- active conferences you were added to as participant.

The Conferences function window remains empty until you create at least one conference or have been invited for a conference.



Here you can configure conferences, initiate conferences already configured, modify configured conferences and delete conferences you have configured.

You reach this function window while configuring a workspace view by selecting the **Conferences** option in the combo box in the main menu **menu > Homepage**.

> ***NOTICE:*** Alternatively, you can also open the **Conferences** function window as separate window via the **Pearl menu > View > Conferences**.

> ***NOTICE:*** You can configure Ad-hoc conferences in the **Contacts** function window and initiate them from there.

2.5.6.1 Conference Types

In this section we provide an overview of the conference types you can use with the OpenScape UC Application depending on the respectively installed and configured features.

The OpenScape UC Application conferencing feature enables you to efficiently and reliably cooperate with your contacts and colleagues. Besides local conferences (with three participants), which you initiate via the **Call Control** from an active call and perform with help of the connected PBX, you can use the following conference types:

- **Ad-hoc**
  An Ad-hoc conference is a voice conference configured dynamically and spontaneously and performed directly. If you want to stage a meeting with several persons and the contact list shows that they are all available, you can select them and start a one-time audio conference. You can then expand this conference to a web conference.

  > ***NOTICE:*** You initiate Ad-hoc conferences only from the **Contacts (compact)** or **Contacts** window.

  > ***NOTICE:*** Ad-hoc conferences support audio connections only.

- **Merge Calls** (expanding a consultation call to a conference)
  You set up a Merge Calls conference on the basis of a consultation call. It does not need any additional user settings. The call on-hold and the consultation call are merged to a conference via the call control. This conference is provided by the conference server of the OpenScape UC Application. Any number of participants can be added to the conference.
- **Meet Me**
  Meet Me conferences are recurrent server-based voice conferences planned and configured in advance. You can configure them as scheduled conferences, which start automatically at a set time, or as unscheduled conferences, which are started manually by the moderator or automatically by the first conference participant who dials in.
  A scheduled conference does not begin at the actual start time but somewhat earlier. This advance period is defaulted by a system configuration. It serves for balancing out minor differences between the system times of the conference participants, thus avoiding failed dial-ins.
  If the defaulted conference duration was too short, it is automatically prolonged following the defaults in the system configuration. Such prolongations are defined in accordance with the overall duration of conferences configured in the system. The default-set value for a prolongation is 30 minutes.
  Depending on the conference control privileges that the participants have, the following two types of Meet Me conference are possible:

– **Open conference**
  An *open conference* is a Meet Me conference in which all participants have equal control privileges. An open, scheduled conference starts automatically at the set time. An open, unscheduled conference is started either manually by one of the conference participants or automatically by the first conference participant who dials in. The conference configuration allows two ways of joining in: Participants are either called automatically by the system after the conference start (dial-out), or they need to dial in by themselves (dial-in). The conference creator is called by the system by default (dial-out) . All other conference participants have to dial into the conference individually (dial-in) . However, you can configure the system to also call single participants.

  NOTICE: You create an *open conference* by activating the **Open Conference** check box in the **Create conference** dialog.

  NOTICE: In the **Call Control** of an open Meet Me conference with many participants, the list of participants who are connected to the conference contains only one entry - each participant only sees himself/herself.

– **Moderated conference**
  A *moderated conference* is a Meet Me conference that only conference participants who have been appointed moderators at the conference creation can control. The conference starts automatically at the scheduled time if such a point in time has been configured. If no start time has been defined, one of the moderators can start the conference manually or by dialing in. The conference creator/moderator is called by the system by default (dial-out) . Depending on the configuration, the conference participants can dial into the conference or are called by the system . After the last participant with moderator privileges has left the conference, it comes automatically to an end for the other participants, too.

  NOTICE: You create a *moderated conference* by deactivating the **Open Conference** check box in the **Add Conference** dialog.

Please note the following for a moderated conference:

– If the moderator of a scheduled conference leaves the conference during the initially scheduled period, the conference persists until the initially scheduled end time. So, the other conference participants can resume the conference.

– If the moderator of an unscheduled conference leaves the conference during the initially scheduled period, the grace period starts when the moderator terminates the conference call. The grace period enables the other conference participants to end the conference also. When the grace period has expired, the conference ends.

- If the moderator leaves the conference during a conference prolongation, the grace period starts when the moderator terminates the conference call. The grace period enables the other conference participants to end the conference also. When the grace period has expired, the conference ends.
- The default system configuration plays a short signal tone audible to all conference participants when a conference participant joins or leaves the conference. In case of a larger number of conference participants joining or leaving, this signal tone may become annoying to the others. Therefore, it is not played anymore when the number of participants specified by the system administrator in the CMP (default 15) is reached.
- In case of a moderated Meet Me conference with many participants, the number of conference participants displayed in the **Call Control** is restricted for clarity. If the number of participants exceeds a value specified by the system administrator in the CMP (default 15), each participant only sees his/her own entry and a specific number of moderators. The number of visible moderators is also defined by the system administrator (default 15).

You can expand every Meet Me conference to a web or video conference or configure it as such when creating it.

- **Web conferences**

  You can use a web conference to show elements and actions represented on your monitor to other users in real time during an online session. By means of this “desktop sharing” you can thus demonstrate operating steps or present an application and work on documents in cooperation with other users. This is particularly useful in training projects, demonstrations and conferences joined by participants who are far away from each other.

  In an OpenScape UC Application system you can integrate different web conferencing providers. The OpenScape Web Collaboration web conferencing application is shipped with OpenScape UC Application by default.

  NOTICE: The web conferencing application OpenScape Web Collaboration of the OpenScape UC Application is not supported for Mac OS.

  NOTICE: You find a guide to using and operating the OpenScape Web Collaboration web conferencing application as well as feature descriptions in the *OpenScape UC Application OpenScape Web Collaboration* user manual.

  The web conferencing application is installed on an individual server. Neither the moderator nor the participants need to install or configure any additional application before using the web conferencing application. After the start of a web conference, the participants can download a program via a user-specific Internet address. The online session is opened after the conference participants have started this program.

  Web conferencing applications support two user roles:

- Presenter - His/her desktop is presented to the other participants. He/she can allow/forbid controlling his/her desktop.
- Viewer - He/she watches the presenter's desktop.

The following user modes are possible during a web conference:

- Moderator - He/she organizes, opens and controls a web conference
- Participants (active/passive) - these are the conference participants who have been invited for a web conference and join a web conference session.

When the moderator starts a web conferencing session, he/she is in display mode. The participants are in viewer mode and see the moderator's desktop. The moderator can change this mode by assigning a participant the privilege to display his/her desktop. In addition, the moderator can delegate the operation of the desktop elements to a participant. This enables the participant to remotely control the mouse and keyboard of the computer the desktop of which is currently displayed. He/she can thus operate the computer.
With configuring a conference, the conference data (participants, dial-in data and time) is sent to the conference participants and entered in their Microsoft Outlook calendar. In addition, the conference is integrated as entry in the conference list of the **Conferences** function window. If configured by the administrator, a conference invitation with the dial-in data is sent to all participants by e-mail.

> ***NOTICE:*** External conference participants are informed about the dial-in data (**PIN**, **Tollfree Bridge Number**, and URL for the web conferencing application as well as the conference start time) by e-mail. If the external conference participants do not have an e-mail address, they must be informed separately, for example by telephone.

- **MeetNow!**
  This term describes video-compatible conferences that you can quickly configure via a special service access number with OpenScape UC Application participants only. The conference room is exclusively defined by entering an arbitrary PIN. In other words, all conference participants that dial the service access number and enter the same PIN are in the same conference room. This, however, may lead to unwanted persons dialing into the conference if the participants agree on a too simple PIN, for example 123. To avoid this, you can use for example the extension of a conference participant as PIN.

2.5.6.2 Controls in the "Conferences" Function Window

Controls on the toolbar

The following features are available in the **Conferences** window for scheduling conferences:

- **Create new conference**

  Click on to create a new conference. The Conferences dialog opens. You can use the entry mask on the Create conference tab to prepare the conference.

- **Edit selected conference**

  This option enables you to edit selected conferences you created yourself via your OpenScape UC Application conference or contact list as well as with the OpenScape Extensions for Microsoft Outlook application. The **Conferences** input mask with the data of the selected conference opens for editing.

  You can perform the following conference settings:

  – Adding or removing conference participants

  > ***NOTICE:*** In case of conferences created via the OpenScape Extensions for Microsoft Outlook application you cannot perform any participant list alterations.

  – Participant role: Moderator or participant (in case of moderated conferences) only

  – Type of connection setup: (participant dials in himself/herself) or (participant is called)

  – Options (moderated/open conference, name recording, video/web conference (if configurable))

  You can use this option to display settings of conferences you have been invited for. In this case you cannot perform any changes.

  Every conference participant can remove himself/herself from the participant list of a conference, no matter whether he/she is the creator or has been invited as participant. This will delete the conference from your own conference list.

  Changes are displayed to all conference participants via the OpenScape UC Application conference list as well as in the Microsoft Outlook calendar next time they open the respective conference dialog.

- **Delete selected conference**

  With the help of this option you can remove conferences you have created yourself (also by deploying the OpenScape Extensions for Microsoft Outlook application) from the list.

- **Combo box** for selecting the conference view

  The combo box in the toolbar allows filtering the conference list by the conferences you have created. Only these conferences are then displayed. Select the **I'm Creator** option in the combo box to display these conferences. Via **All Conferences** the complete list of conferences is displayed.

Controls of a conference list entry

The following information and features are available for each conference entry:

- **Extended representation**

  With a click on the conference entry in the list shows more details. These details consist of the following information and features (from left to right):

   – Name of the conference participants
   – Type of connection setup: (participant dials in himself/herself) or (participant is called)
   – Opens the dialog for composing a new e-mail in your default e-mail application. The e-mail address of the relevant conference participant, the subject line and the message text (conference name, PIN, etc.) are already allocated for this new e-mail.

     NOTICE: The recipient address, the subject line and the message text that the client transfers to your default e-mail application for the new e-mail must not comprise more than 2000 characters. If the data to be transfered requires more characters, the automatically opened e-mail does not contain all necessary information. In this case the last characters of the message text are the first to be left out.

   – Opens the **Directory Search** dialog in a separate window and displays the contact information of the respective participant available in all defined directories.

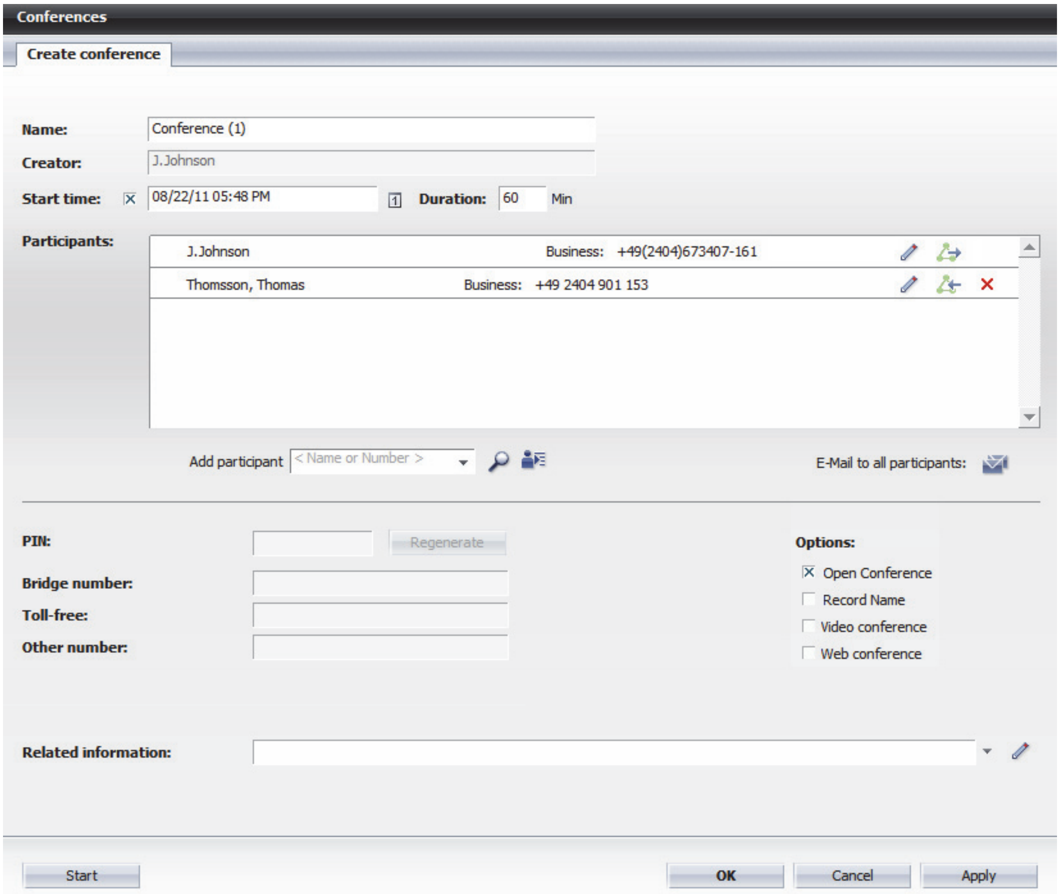
- **Start time**
  Specifies the time at which the system starts a scheduled Meet Me conference.
- **Name**
  Conference name
- **Creator**
  Name of the inviting person
- **Start conference**
  Click on to start a conference. A list with the options **View Conference** and **Join to Conference** opens. Select **Join to Conference** here.
  You can use the **View Conference** feature to see the connection data and controls of the conference in the **Call Control** window during the conference.
- **Existing conference**
  Click on and select **View Conference** to display the connection data and control elements of an active conference in the **Call Control** window.

2.5.6.3 Settings of a Meet Me Conference

In the **Conferences** function window you can configure and edit a scheduled or unscheduled Meet Me conference. You can initiate the configured conference also from this window.

Configuration options of a new Meet Me conference

After a click on in the **Conferences** function window the following dialog opens for configuring a new Meet Me conference.



You find the following input fields, options and features in this dialog:

- **Name**
  This is the conference's name. It is displayed under this name in the **Confer-ences** window. The name must not exceed 30 characters.
- **Creator**
  Here you can see the name of the person that configures the conference. This person is also the moderator of a moderated conference.
- **Start time**
  When you activate this checkbox, the system starts the conference at a specific time automatically. An input field for setting date and time as well as for determining the conference duration is displayed. With a click in these fields you can define the time specifications. The start time set here appears in the conference list after you have created the conference.

- Configuring date and time
  Default for the start time is the current time at which the **Conferences** dialog was invoked. You can change the start time with a click in the input field next to the checkbox or on 1 . A calendar dialog opens, in which you define date and time.
  To set the conference day, click on it in the displayed month. You can browse the months using the two up and down arrow icons.
  You can set the time via the **Hour** and **Min** slide controls found under the time display. Use the **Hour** slide control to set hours and the **Min** slide control to specify minutes.
  A click on the **now** button displays the current date and time and you can apply these specifications to the new conference.
  A click on the **Close** button closes the calendar dialog.
- **Duration**
  In the **Duration** input field you can determine how long the conference is to last. You can make entries from 10 to 9999 minutes. The default setting is 60 minutes.

NOTICE: A scheduled Meet Me conference stays active until the scheduled time has elapsed. If the conference has been prolonged and the moderator(s) leave(s) the conference before the default prolongation of 30 minutes is up, the scheduled conference ends automatically after one minute.

NOTICE: A moderated Meet Me conference is prolonged by the time set in the CMP if the participants do not leave the conference prematurely. This pre-set time is 30 minutes by default and can be changed by the system administrator. As soon as all moderators have left the conference, it stays active for one minute. This period allows the moderators to log back into the active conference. If they do not, the moderated Meet Me conference ends automatically after this one-minute period.

- **Participants**
  This section lists all conference participants. The inviting participant (moderator) is automatically placed in the list as first entry.
  A participant entry in the list of conference participants contains the following information (from left to right):
  - The name of the conference participant
  - The phone number of the conference participant

NOTICE: If several phone numbers have been configured for the conference participant, the one he/she currently uses is displayed shifted to the left. You can click right in front of the phone number display to select another phone number from the displayed list.

– Role of the participant in the conference if the conference is a moderated one. In this case the inviting participant is the creator and simultaneously also the **moderator** of the conference. The moderator privileges enable the user to control the conference and to change its settings. His/her role cannot be changed. The **participant** role is for users you cannot or must not control the conference.
You can manually set the role of all participants except for the creator with a click on the label **Participant** or **Moderator**. Other conference participants, except for the creator, may thus be assigned moderator privileges also.

NOTICE: In case of an open conference no roles are assigned to the participants.

– Edit participant entry

A click on opens the **Add participant** dialog in which you can change the **Display name**, the **Phone** number and the **E-mail** address of the selected conference participant. A click on **OK** copies your modifications and the **Add participants** dialog closes.

– or. Type of the conference setup
These icons indicate whether the participant needs to dial in by himself/herself ( ) or is called by the system ( ). Moreover, you can reverse the call behavior by clicking the button.

– × Delete entry
A click on this icon removes the corresponding conference entry from the conference list. All conference participants, except for the creator, can be removed from the conference.

- **Add participant**
Use one of the following options to select conference participants:
  – Enter the phone number or name of the desired contact in the **Add participant** combo box. Then click on . The **Add participant** dialog opens for completing the participant data. Specify the missing data (name, phone number and e-mail address) and click on **OK** in this dialog. The selected contact is added to the list of conference participants.

NOTICE: If you do not configure an e-mail address for the participant here, he/she will not receive a conference notification e-mail and thus no information about the conference access data.

  – Click on the triangle icon on the right margin of the **Add participant** combo box. The list that displays the last 20 phone numbers you have dialed opens. Select the phone number of the subscriber to be added to the conference. Then click on . The **Add participant** dialog opens for completing the participant data. Specify in there the **Name** and **E-mail** address of the contact for display in the conference list. Finally click on **OK** in this dialog. The selected contact is added to the participant list and notified about the conference access data by e-mail.

> ***NOTICE:*** If you do not configure an e-mail address for the participant here, he/she will not receive a conference notification e-mail and thus no information about the conference access data.

– Click on to initiate a contact search in the available directories. The entry mask with the search criteria opens. Select the desired contact from the hits and click on **OK** in the **Directory Search** dialog. The selected contact is added to the participant list and notified about the conference access data by e-mail.
– Click on . The **Add participant** dialog opens. Specify here the **Name**, the **Phone** number as well as the **E-mail** address of the conference participant. Finally click on **OK** in this dialog. The contact is added to the list of conference participants.

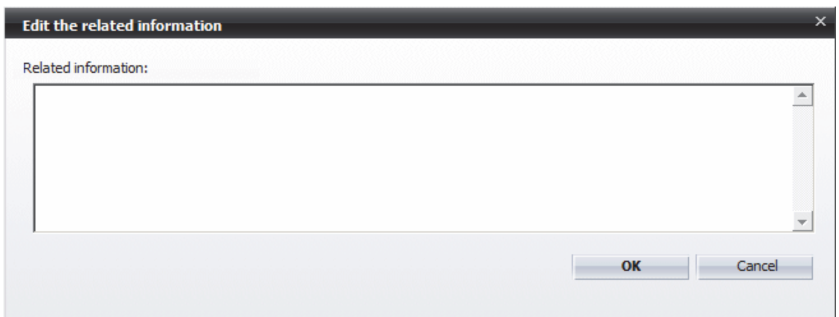
> ***NOTICE:*** If you do not configure an e-mail address for the participant here, he/she will not receive a conference notification e-mail and thus no information about the conference access data.

- **Send e-mail to all participants**
  When you click on , the dialog for composing a new e-mail opens in your default e-mail application. The e-mail addresses of all conference participants are already entered in the recipient line of this new e-mail. The subject line is allocated also. The message portion of the e-mail is empty and can be filled in by yourself. You can for example send a short meeting agenda to all conference participants.

> ***NOTICE:*** The recipient addresses and the subject line that the client transfers to your default e-mail application for the new e-mail must not comprise more than 2000 characters. If the data to be transferred requires more characters, the automatically opened e-mail does not contain all necessary information. In this case the last characters of the subject line are the first to be left out.

- **PIN**
  When you create the conference with a click on the **Apply** button, a **PIN** is automatically generated and displayed in this field. Using the PIN the conference participants authorize themselves to join the conference.
  Via the **Regenerate** button you can create a new PIN.
- **Bridge number**
  This field displays the **bridge number**, which the system automatically sets when you click on the **Apply** button. Under this phone number the conference participant needs to log on to the conference. A bridge number supports several callers under a single phone number.

- **Toll-free**
  The **Toll-free** field displays an alternative bridge number for logging on to the conference free of charge. This feature needs to be configured, so that the system can automatically display this number after you have clicked on the **Apply** button.
- **Other number**
  The **Other number** field displays an alternative number for logging on to the conference. This feature needs to be configured, so that the system can automatically display this number after you have clicked on the **Apply** button.
- **Related information**
  In this field you can enter information as comment on the conference. All invited participants can see this additional text in the list entry of the relevant conference in the **Conferences** window. A click on ✎ next to the **Related information** combo box opens the following dialog in the text field of which you can enter the additional text.



  You can save your entry with **OK** and close the dialog.
- **Options**
  You can use this option to define which options are configured with this conference for the conference participants:
  – **Open Conference** (default) or moderated conference
    If this option is set, all conference participants have equal rights to control the conference. If this option is not set, the conference can only be started and controlled by the moderator (conference creator).
  – **Record name**
    Activate this option if only participants are allowed to join the conference who have previously stated their names. If a name recording has not been performed yet, the system prompts the relevant conference participants to first record their name.
  – **Video conference**
    If the **Video conference** option is set, the conference is prepared as video conference.
  – **Web conference**
    Setting the **Web conference** option will start a web session in addition to the audio conference.

NOTICE: The **Web conference** option is only available if a web conferencing system has been configured.

- **Apply** button
  A click on this button saves your entries and the configuration dialog for the conference stays open. Subsequently, you can perform further configuration steps. The conference you have just created appears in the conference list of all OpenScape UC Application participants. An e-mail with conference dial-in data is automatically sent to all participants for whom an e-mail address has been specified.
- **Start** button
  With a click on this button you can initiate an unscheduled Meet Me conference after you have applied the settings determined in the template.
  If the configured Meet Me conference is a scheduled one, you can use this button to join the already automatically started conference.
- **OK** button
  With a click on this button you can save the conference settings and close the configuration dialog.
- **Cancel** button
  With a click on this button you can close the configuration dialog without creating a conference or to dismiss all modifications you have made to an existing conference that are not applied yet.

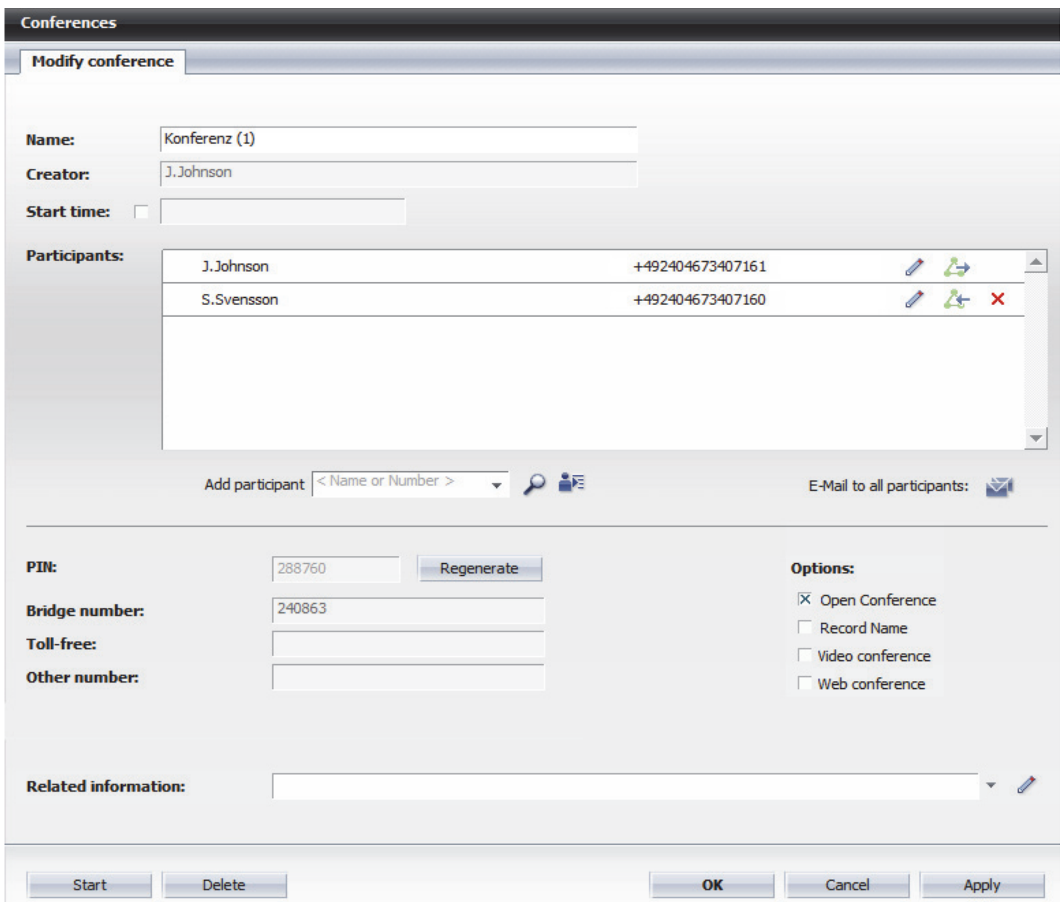
Configuration Options of an existing Conference

A click on in the **Conferences** function window opens the following dialog in which you can change the configuration of an already created Meet Me conference.

NOTICE: Only the creator can change settings of a moderated Meet Me conference.

NOTICE: The settings of an open Meet Me conference can be edited by all subscribers.

NOTICE: The icon remains blocked (grayed out) until you have selected an entry in the conference list.



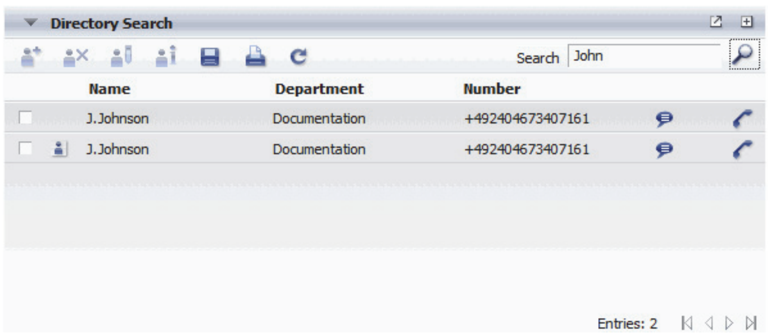
This dialog offers the same input fields, options and features like the dialog for creating a Meet Me conference and allows removing a conference from the conference list via the **Delete** button.

2.5.7 Directory Search

In the **Directory Search** function window, you can access your company directory, the OpenScape UC Application user directory and your private contacts to search for contact names.

Compact view

You reach the compact view of the **Directory Search** function window via the main menu under **menu > Homepage** by adding it as component to one of the workspace views via the **Directory Search** option.



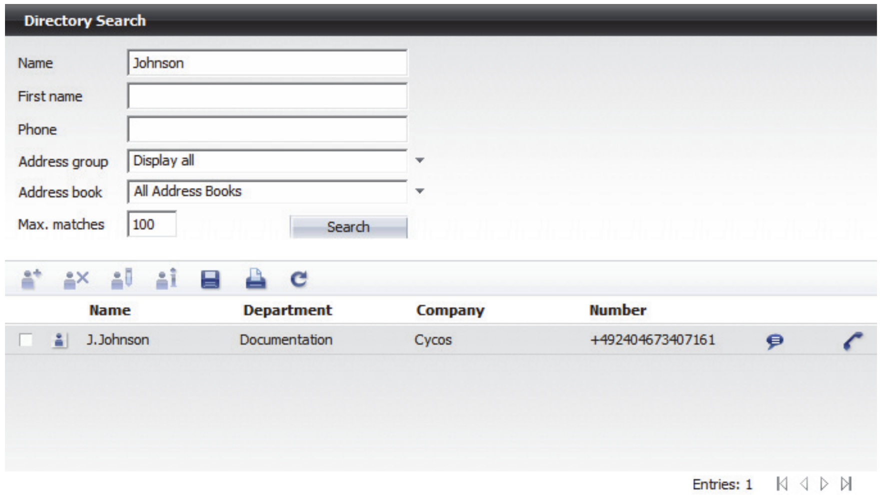
NOTICE: Alternatively, you reach the compact view of the **Directory Search** function window via the **Pearl menu > View > Directory Search**.

This function window enables you to quickly look for a contact in all configured address books. Start the quick search with a click on after you have entered the second or first name of the user whose data you look for in the **Search** entry field.

Extended view

If the quick search delivers too many hits, you can use the advanced search. By specifying additional search criteria you can narrow down the number of hits considerably, thus enhancing the use of the search feature.

You reach the extended view of the **Directory Search** function window via the **menu > Homepage > Directory Search (extended)** or with a click on ↗ in the caption bar of the compact view. In addition to the contact information represented in the compact view it displays the contact attributes **Company** and **Number**.



Start the advanced search via the **Search** button after you have entered the search criteria in the mask. The following search criteria are available in this window:

- **Name**
  Find a participant by his/her second name.
- **First name**
  Find a participant by his/her first name.
- **Telephone**
  Find a subscriber by his/her phone number.
- **Address group**
  If you have grouped your contacts in address groups, you can enter here the address group of the contact you look for.
- **Address book**
  Specify here the address book in which you want to search.
- **Max. matches**
  Specify here how many hits are to be displayed in the search hit list.

> ***NOTICE:*** The search criteria **Name**, **First name**, **Phone** and **Address group** cannot be combined. In other words, you cannot search using two or more criteria simultaneously.

2.5.7.1 Information in the "Directory Search" Window

The **Directory Search** function window displays the following information for each search hit (from left to right):

- A radio button for selecting the entry.

- An icon that indicates the address directory that contains the found contact.
  - – The contact information was found in the configured directory of your company.
  - – The contact information originates from the global contact directory of the OpenScape UC Application.
  - **empty -** The contact information originates from your private address book.
- The name of the contact,
- The department of the company that employs the contact
- The company that employs the contact (**Directory Search (advanced)** only)
- The contact's business phone number (**Directory Search (advanced)** only)
- The icon for sending an e-mail to this contact. A click on this icon opens the e-mail form of your default e-mail application for sending an e-mail to this contact.
- , to send an instant message to this contact.

  NOTICE: The icon is only displayed if an instant-message address has been configured for the contact.

- or Enables calling the displayed phone number or another phone number of the subscriber. You can access the additional phone numbers of a user by clicking on the respective receiver icon flagged with an additional small triangle. The voicemail row is then enlarged and shows all phone numbers under which this subscriber can be reached.

2.5.7.2 Controls in the "Directory Search" Window

The following features are available to you in the toolbar of the compact as well as extended view of the **Directory Search** window.

- **Integrate as new user entry in the address book**

  NOTICE: This icon is blocked (grayed out) for search hits from your private OpenScape UC Application address book.

  To integrate a selected user from the search hits list in your contact directory, click on . The **Contacts** (**Add entry to contact list**) dialog opens with the available contact data. If required, complete the entries for this contact.
  Then click on the **OK** button. The data of this user is copied to your contact list and the **Contacts** (**Add entry to contact list**) dialog closes.

- **Delete user entry**

  NOTICE: This icon is blocked (grayed out) for search hits from a directory.

  To remove the contact searched for from your private contact list, select the appropriate search hit. Then click on .
- **Change user entry**

  NOTICE: This icon is blocked (grayed out) for search hits from a directory.

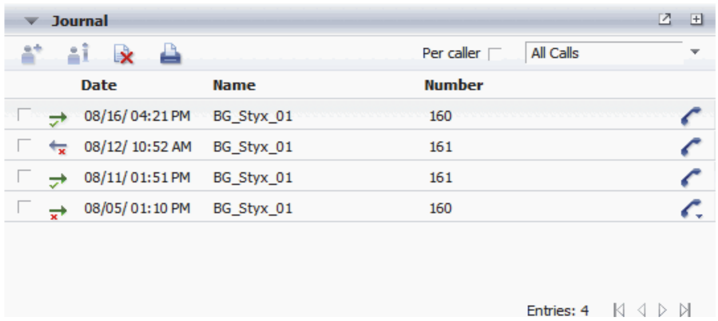
  To edit a user entry searched for from your private OpenScape UC Application contact list, select the appropriate search hit and then click on . The **Contacts** (**Edit entry from contact list**) dialog, which contains already available contact data, opens. Perform the desired modifications. Click on **OK** to save the modifications and to close the **Contacts** (**Change entry in the contact list**) dialog.
- **Display user entry**
  To view the information that associates the user searched for, select the appropriate search hit. Then click on . The data that associates this user is displayed in the separate **Lookup Person** window.
- **Save addresses on local system**
  To save the found contact entries locally on your computer, click on . A new window opens that displays the found contact data in **tabular form**. Click on the **Save** button. The directory selection dialog of Windows opens. Select here the directory as well as the file type and specify the file name under which the address list is to be stored.
- **Print addresses**
  To print the found contact entries, click on . The contact information is printed out in table form.
- **Reset search entry**
  To delete all entries in the **Search** input field, click on .

2.5.8 Journal

The **Journal** function window logs all in and outbound calls as well as conferences, no matter whether or not they were successful.

Compact view

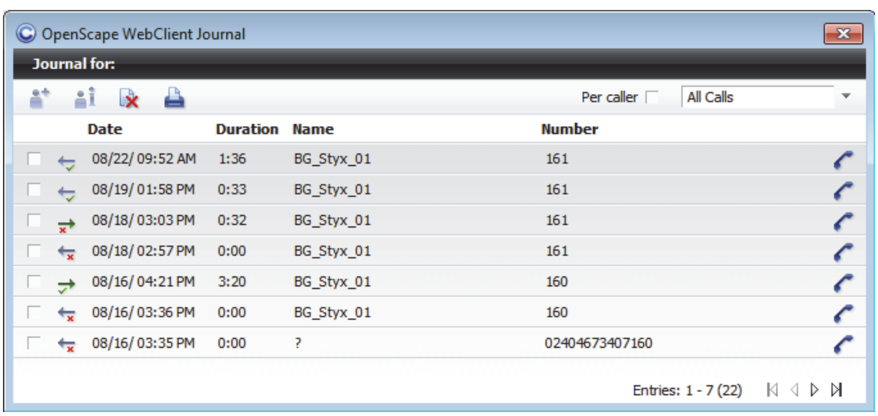
You reach the compact view of the **Journal** function window via the main menu under **menu > Homepage** by adding it as component to one of the workspace views via the **Journal (all calls)** option.



> ***NOTICE:*** You reach the compact view of the **Journal** function window via the **Pearl menu > View > Journal**.

Extended view

You reach the extended view of the **Journal** function window with a click on in the caption bar of the compact window view. It opens in a separate window and, in addition to the information represented in the compact view, displays the **Duration** of the call or conference.



2.5.8.1 Information in the “Journal” Window

The **Journal** function window displays the following information on each journal entry (from left to right):

- A radio button for selecting the entry.
- An icon that displays the status of the relevant call.
  - – Successful outbound call.
  - – Unsuccessful outbound call.
  - – Successful inbound call.

- – - Unsuccessful inbound call.
- – - Forwarded inbound call.
- – - Conference call specifying that you have dialed into the conference.
- – - Conference call specifying that the system will call you for joining the conference.

- **Date** and time when the call arrived or was made
- **Duration** of the inbound or outbound call (in the extended view only)
- **Name** of the caller or callee

> ***NOTICE:*** The name can only be displayed if it is contained in the contact list or global address book.

- The **Number** you have dialed or that was transmitted by the caller.
- , to display the contact information that associates the selected journal entry. A click on opens the **Lookup Person** dialog with the subscriber's contact data (if available).
  If no contact information could be found, the user will be correspondingly informed in a dialog. In this dialog you can integrate the selected person in your own contact list or you can search all configured directories for information about this person .
- or Enables calling the displayed phone number or another phone number of the subscriber. You can access the additional phone numbers of a user by clicking on the respective receiver icon that is flagged with an additional small triangle. The voicemail row is then enlarged and shows all phone numbers under which this subscriber can be reached.

The journal entries can be sorted in ascending or descending order according to different criteria. For this purpose, click in the row under the toolbar of the **Journal** window on the desired sorting criterion: **Date**, **Name** or **Number**.

2.5.8.2 Controls in the "Journal" Window

The following features are available to you in the toolbar of the compact as well as extended view of the **Journal** window.

> ***NOTICE:*** Some features do not become active until you select a journal entry.

- **Integrate as new user entry in the address book**
  To transfer the contact data of this call to your contact list, select the corresponding call from the journal. Then click on . The contact input mask opens with the contact information already known. If required, supplement the information and click on **OK** to store the data in your contact list.

- **Display user entry**
  To view the information available for a journal entry, select the corresponding call from the journal. Then click on . The data that associates this user is displayed in the separate **Lookup Person** window.
- **Delete journal entries**
  To delete a journal entry, select the corresponding entry. Then click on . If you want to delete several journal entries simultaneously, select the corresponding entries and click on . You can make a selection via **[Ctrl]** + clicking the journal entry or by activating the check box that precedes the relevant journal entry.
- **Print journal entries**
  To print the complete journal information, click on . The journal information is shown in a separate window in tabular form. With a click on the **Print** button the list is put out on your printer.
- **Adjust the time**

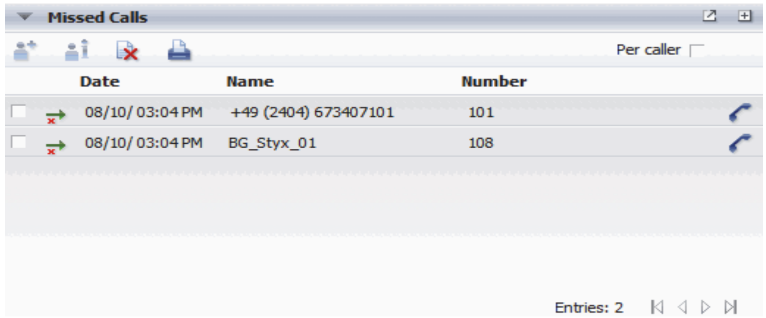
  > ***NOTICE:*** You see this icon in the **Journal** function window only if in the **General settings** dialog on the tab **Common > Appearance** a **Mobile time zone** has been configured.

  This is useful when you are in a different time zone, working with the program from there. The event time is then displayed in local time.
- **Per caller** check box
  To display only one entry per caller in the **journal** you can set the **Per caller** option. If a caller tried to reach you several times, only the last attempt will be logged.
- **Combo box**
  Via the combo box on the right margin you can filter the journal entries according to the call type:
  – **All Calls** Default setting that shows all calls in the journal.
  – **Missed Calls** shows the unaccepted calls only. If a connection is established to a user at a later date, the call is no longer displayed as "missed".
  – **Incoming Calls** displays the inbound calls only.
  – **Outgoing Calls** displays the outbound calls only.

2.5.9 Missed Calls

The **Missed Calls** function window logs all calls that you did not accept. It is thus a sub-set of the entries in the **Journal** window and offers the same operating options. The only missing element is the combo box on the right for filtering the entries by the call type.

You reach the **Missed Calls** function window via the main menu when configuring an individual view under **menu > Homepage**.



> ***NOTICE:*** Alternatively, you can open this function window via the **Pearl menu > Status Information > Missed Calls**.

2.5.9.1 Information in the "Missed Calls" Window

A journal entry for missed calls contains the following elements (from left to right):

- A check box to select entries for editing
- - Show the status **"Missed Call"** of the relevant call
- **Date** and time when the missed call occurred
- **Name** of the caller

> ***NOTICE:*** The name can only be displayed if it is contained in the contact list or global address book.

- **Number** of the caller
- - Display contact information about the selected journal entry. When you click on this icon, the **Lookup Person** dialog with the subscriber's contact data (if available) opens.
- or - Enables initiating an immediate callback to the displayed phone number or to another phone number of the subscriber. You can access the additional phone numbers of a user by clicking on the icon that is flagged with an additional little triangle. The journal row is then enlarged and shows all phone numbers under which this subscriber can be reached.

2.5.9.2 Controls in the "Missed Calls" Window

The following features are available to you in the toolbar of the compact view as well as in the extended view of the **Missed Calls** window.

> ***NOTICE:*** Some features do not become active until you select a journal entry.

- **Integrate as new user entry in the address book**
  To transfer the contact data of this call to your contact list, select the corresponding call from the journal. Then click on . The contact input mask opens with the contact information already known. If required, supplement the information and click on **OK** to store the data in your contact list.
- **Display user entry**
  To view the information available for a journal entry, select the corresponding call from the journal. Then click on . The data that associates this user is displayed in the separate **Lookup Person** window.
- **Delete journal entries**
  To delete a journal entry, select the corresponding entry. Then click on . If you want to delete several journal entries simultaneously, select the corresponding entries and click on . You can make a selection via **[Ctrl]** + clicking the journal entry or by activating the check box that precedes the relevant journal entry.
- **Print journal entries**
  To print the complete journal information, click on . The journal information is shown in a separate window in tabular form. With a click on the **Print** button the list is put out on your printer.
- **Adjust the time**

  > ***NOTICE:*** You see this icon in the **Journal** function window only if in the **General settings** dialog on the tab **Common > Appearance** a **Mobile time zone** has been configured.

  This is useful when you are in a different time zone, working with the program from there. The event time is then displayed in local time.
- **Per caller** check box
  To display only one entry per caller in the **journal** you can set the **Per caller** option. If a caller tried to reach you several times, only the last attempt will be logged.

2.5.10 Voicemail Box

You can send and receive voicemails if the system OpenScape UC Application you are logged in to is configured as voicemail server. You send voicemails via a voicemail script installed on the voicemail server. The system administrator specifies up to five access numbers that enable you to use the voicemail script with different features. For example, one access number serves for directly connecting your mailbox via telephone. You can then use the phone to record and send a voicemail, to listen to incoming voicemails or to edit your mailbox settings.

You reach the **Voicemail Box** function window via the main menu when configuring an individual view under **menu > Homepage**.

> ***NOTICE:*** Alternatively, you reach this function window as separate window via the **Pearl menu > Status Information > Voicemail**.

Voicemails that were sent directly to your mailbox via voicemail script and voicemails that were delivered by phone rerouting can be played via the web interface in this way.

These voicemails are displayed in the **Voicemail Box** function window. The voicemails can be played from there with help the following functions:

- Via your workstation telephone.
- Via the computer soundcard by means of Windows Media Player.

2.5.10.1 Information in the "Voicemail Box" Window

A voicemail entry in the **Voicemail Box** contains the following elements (from left to right):

- A check box to select voicemails for playing or deleting.
- The status of the respective voicemail:
  – - The voicemail has not been played yet,
  – - The voicemail has been played.

> ***NOTICE:*** A click on labels a voicemail that has not been played yet as played (). This also disables the new-voicemail notification at the configured terminal device.

- The **Date** and time of the voicemail's arrival.

- The originator's **Name**.

NOTICE: The name can only be displayed if it is contained in the contact list or global address book.

- - Click on this icon to start playing the voicemail either by telephone or sound card (via *Windows Media Player*).
- or Enables calling the displayed phone number or another phone number of the subscriber. You can access the additional phone numbers of a user by clicking on the respective receiver icon flagged with an additional small triangle. The voicemail row is then enlarged and shows all phone numbers under which this subscriber can be reached.

2.5.10.2 Controls in the "Voicemail Box" Window

The toolbar of this function window lets you reach the following features:

- **Delete journal entries**
  With a click on you can delete a selected voicemail entry.
  If you want to delete several voicemail entries simultaneously, select the corresponding entries and click on . You can make a selection via **[Ctrl]** + clicking the journal entry or by activating the check box that precedes the relevant journal entry.
- **Save a voicemail entry locally**
  If you want to save a received voicemail locally, select it in the **Voicemail Box** and click on . A directory selection dialog opens in which you can specify the storage location and the voicemail name. After you have saved the voicemail locally, it is still available also after removing it from the Voicemail Box.

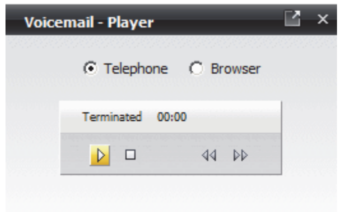
Under the toolbar of this function window you find the table header for the voicemail entries. With a click on the column description you can sort the journal entries ascendingly or descendingly by **Date**, **Name** and **Number**.

2.5.10.3 How to Control Voicemail Playback (Voicemail Player)

You can play voicemails either by phone or computer soundcard using the *Windows Media Player*. You start the playback with a click on the icon for the respective voicemail entry in the **Voicemail Box** and control it via the **Voicemail Player** dialog.

Voicemail player for playback by phone

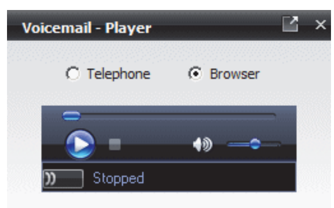
After picking up the receiver the following controls for voicemail playback by telephone are available:



- - Start playback or continue playback after pause.
- - Stop voicemail playback (pause). The icon changes to .
- - Stop playback / reset to beginning.
- - Rewind message to, for example, replay a passage.
- - Fast-forward message to, for example, skip parts of the message.

Voicemail player for playback using the *Windows Media Player*

Under the operating elements of the playback control you find a status bar that displays the current playback status. After a short initialization period (connection is set up) the status bar displays “Ready”. You can now start the voicemail playback.



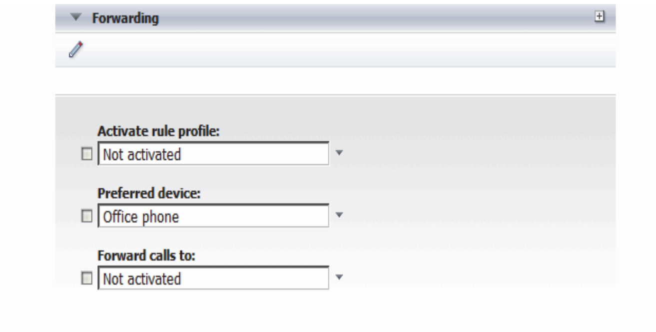
You can use the following controls for playback via the *Windows Media Player*:

- - Start playback or continue playback after pause.
- - Stop voicemail playback (pause). The icon changes to .
- - Stop playback / reset to beginning.
- - Switch tone off.
- - Switch tone on again.
- - Moving the slider with the mouse you can increase or decrease the volume.

2.5.11 Call Forwarding

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

You reach the **Forwarding Call** function window via the main menu under **menu > Homepage**.



This function window represents the compact view of the **Forwarding** tab, that you can reach via the **main menu** under **menu > General ... > Common tab**.

Alternatively, you can open the extended view of this tab with a click on .

2.5.11.1 Options in the "Forwarding" Window

In the **Forwarding** dialog you can select three options via combo boxes for a call forwarding:

- **Activate rule profile**
  When using this option you can select a rule profile you have created to determine how an incoming call should be handled.

  > ***NOTICE:*** Please note that the **Forward calls to** option is higher prioritized than a call forwarding by a rule profile.

- **Preferred device**
  If you use this option, you can select another device to which the call will then be routed. The one-number service is displayed to a caller for incoming as well as outgoing calls. You can specify additional routing options for incoming and outgoing calls via the general settings in the settings dialog. You reach this dialog with a click on or via **menu > General ... > Common tab > Forwarding tab**.
- **Forward incoming calls**
  Use this option to select the device to which an incoming call is to be routed. The forwarding destination is displayed to the caller. In addition, you can bind specific status conditions to the forwarding in the settings dialog. You reach this dialog with a click on or via **menu > General ... > Common tab > Forwarding tab**.
  It is possible to determine one device for each of the following statuses:
  – **unconditional to**
    routes a call to the phone number defined for this purpose without condition.

– **on busy to**
routes a call to the phone number defined for this purpose only when your line is engaged.

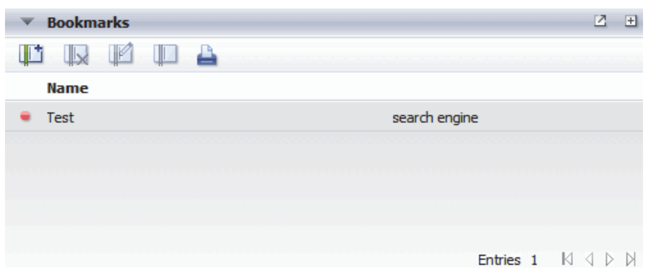
> ***NOTICE:*** This feature is only available for specific PBXs.

– **after time to**
routes a call to the phone number defined for this purpose if the call is not accepted after a specific period.

> ***NOTICE:*** This feature is only available for specific PBXs.

2.5.12 Bookmarks

You reach the **Bookmarks** function window via the main menu under **menu > Homepage** by selecting **Show Bookmarks** in the combo box.



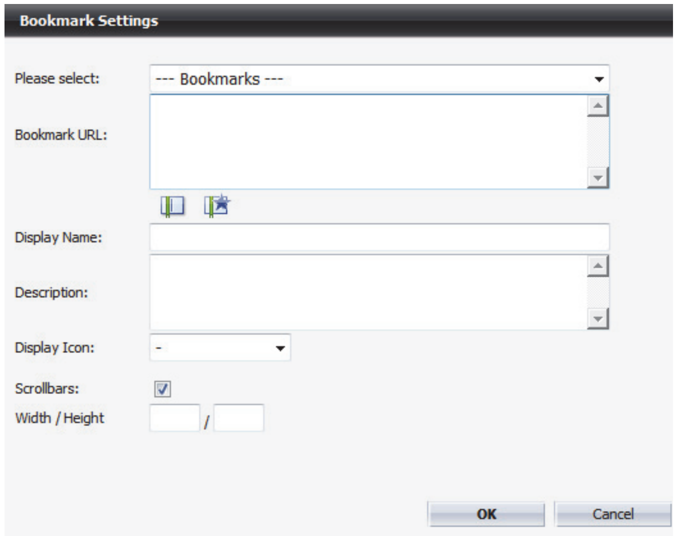
In this dialog you can default bookmarks or open internet pages via bookmarks already specified.

2.5.12.1 Options of the "Bookmarks" Window

You can access the following features via the toolbar of the **Bookmarks** window.

> ***NOTICE:*** Some features do not become active until you select a bookmark entry.

- **Create bookmark**
  You use this feature to add a new bookmark to the list. The **Bookmark Settings** dialog opens.



The following options for configuring a bookmark are available in this dialog:

– **Please select**
  You can use this combo box to select a bookmark for editing.

– **Bookmark URL**
  Enter the internet address of the page that you want to save as bookmark.

NOTICE: To ensure that the selected internet page is displayed as your own tab, you must specify the complete URL inclusive `http://` or `https://`.

–

  Click on to check the URL just entered. The configured internet page opens in a separate window.

– **Display Name**
  Enter here a name under which this bookmark is itemized in the list.

– **Description**
  Enter here a short text that describes the bookmark. This text is also displayed in the list entry for this bookmark.

– **Display Icon**
  Select an icon for this bookmark. A click on this icon opens this internet page in a separate browser.

– **Scrollbars**
  If this option is set, vertical and horizontal scrollbars that may exist are displayed in the browser. If you do not want to use scrollbars, you can hide them by disabling this option.

– **Width/Height**
Here you can default the size of the browser in which the internet page opens. Useful values for this setting range between 500 and 1000, respectively for width and height. Once the browser is open, you can bring the screen to any size by dragging the frame.

- **Delete bookmark**
You use this feature to remove a selected bookmark from the list.
- **Change bookmark**
Via this feature you can edit a selected bookmark. The **Bookmark Settings** dialog opens with the already available settings.
- **Open bookmark**
This option lets you open an internet page you have already configured as bookmark. The corresponding internet page opens in a separate browser.

NOTICE: You can also open the internet page by clicking the icon that precedes the list entry.

- **Print bookmark**
This feature allows printing the bookmarks you have configured. The bookmark list appears in tabular form in the **"Bookmarks"** window. With a click on the **Print** button the list is put out on your printer.

2.5.13 Team Features - Overview

The OpenScape UC Application team features let you group several OpenScape UC Application users into single teams, thus providing each member with useful telephony features.

The following features are available to team members:

- If privileged, each team member can see the telephone status of other team members.
- If privileged, each team member can see whether a call comes in for other team members.
- If privileged, each team member can accept calls on behalf of other team members.
- If privileged, each team member can access the journal entries of other members.
- Team members who have team administrator privileges can manage the member list of the respective team.
- Each team member can become team administrator of his/her own team, thus obtaining the privilege of managing this team.
- Only team administrators who have been assigned the default **Team Administrator** profile or another profile with the privilege of **managing groups** by the OpenScape UC Application system administrator in the CMP can create new teams and delete his/her own already existing teams.

The following persons are authorized to create and manage a team:

- The OpenScape UC Application system administrator via the CMP.

> ***NOTICE:*** You find detailed information about managing the team features via the CMP in the *OpenScape UC Application V7 Configuration and Administration* manual.

- A team administrator via the client GUI - This is an OpenScape UC Application user who has been assigned the default **Team Administrator** profile or another profile with the privilege of **managing groups** by the OpenScape UC Application system administrator in the CMP.

The members of a team can have one of the following roles:

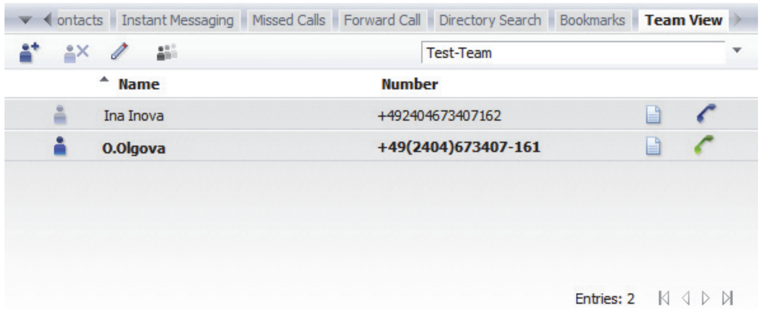
- Team administrator
  A team administrator is an OpenScape UC Application user who is privileged to manage the team. This includes adding new members to the team and removing members from the team. Every OpenScape UC Application user may adopt the Team Administrator role. A team can have several members with Team Administrator role. Each team administrator can define other team members as team administrators of the respective team also. The team administrator keeps his/her role until he/she removes himself/herself or is removed by another team administrator from the team or the team creator or another team administrator withdraws the privileges of managing a team from him/her.
  The creator of a team is automatically its team administrator also. He/she keeps the privileges of managing the team as long as the team exists and independently from modifications to the assigned profiles/privileges in the CMP. Other team administrators are not entitled to withdraw the team administrator privileges from the team creator.
- Team member
  A team member is an OpenScape UC Application user who is not allowed to manage the team. Each team member can be appointed team administrator by another team administrator via the client GUI or by the system administrator in the CMP.

For working in the team, OpenScape UC Application provides the **Team View** function window. You reach the **Team View** function window with a click on the **Team View** tab in the tab bar displayed under the main menu.

2.5.13.1 Team View - Controls and Features

The **Team View** function window shows the member list of the respectively selected team. The **Team View** remains empty until you are added to a team as member or have created a team.

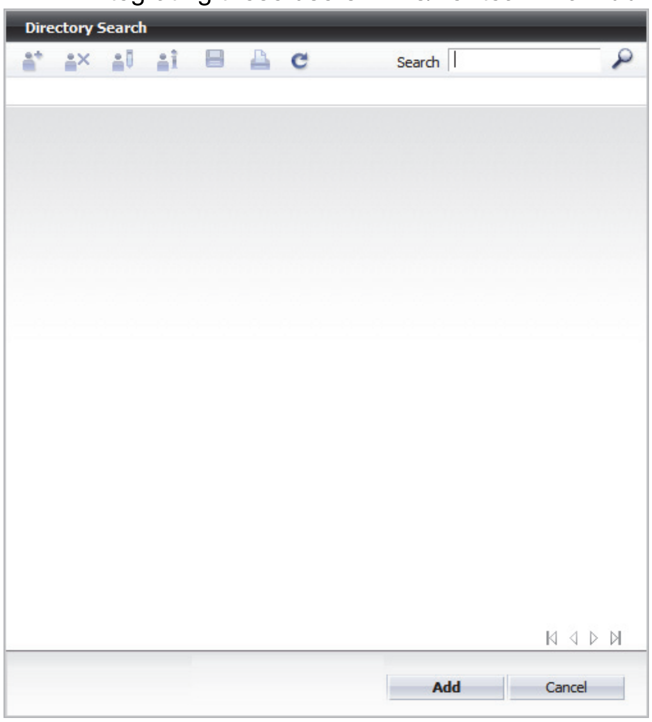
Depending on the OpenScape UC Application user profile (Team or/and Team Administrator) assigned to you, the **Team View** provides various features and information.



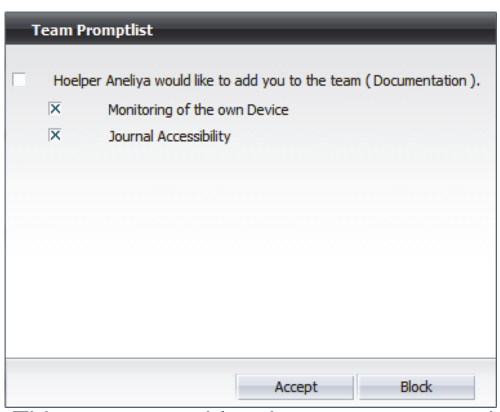
- **Search for team members**

NOTICE: The button is available to team administrators only.

The team administrator can use this feature to find contact information about OpenScape UC Application users in the **Directory Search** dialog for integrating these users in his/her team via **Add**.



The new team member receives automatically a team prompt from the OpenScape UC Application system that may look like this:

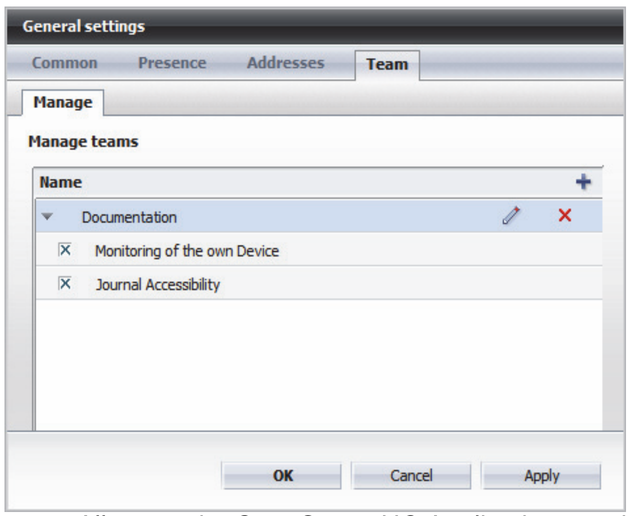


This prompt enables the new team member to decide whether or not to be integrated in the team. In addition, he/she can specify whether other team partners may access his/her journal entries or monitor his/her telephone status.

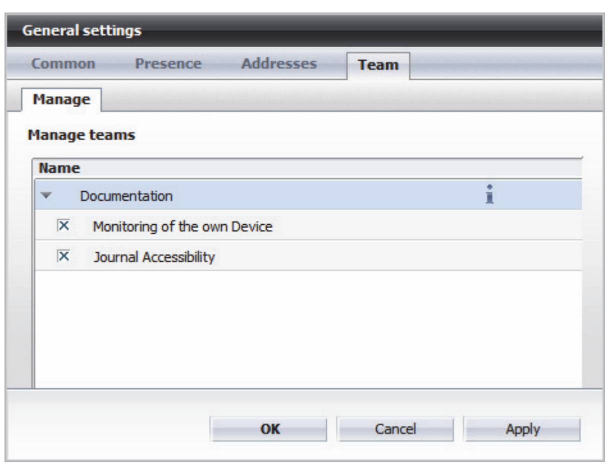
NOTICE: Inbound team prompts are signaled in the **Pearl menu**

> Status Information > Team Promptlist.

- **Delete member**
  This option allows the team administrator to remove team members from his/her team after selecting them.
  In addition, every team member can use this option to quit the respective team by himself/herself if the following applies:
  – The relevant team member was not added to the team by a system administrator and is thus an enforced team member.
  – The relevant team member is not the last team administrator of the team.
- **Manage team**
  This icon serves for opening the settings dialog the team administrator uses for specifying new teams and managing existing ones. This settings dialog for a team administrator may look like this:



All teams the OpenScape UC Application user has created by himself/herself and those he/she has been added to as member are listed.
For team members this dialog contains a restricted number of features as exemplified by the below figure.



- **Make team member a team administrator**
  This button allows each team administrator to appoint any other team member team administrator. This entitles the team member to manage the respective team as he/she can:
  – Integrate new members in the team.
  – Remove team members from the team.
  – Assign team members the team administrator privilege or withdraw this privilege from them.

  If a team administrator has on top of that been assigned the team administrator profile, he/she can also:
  – Create new teams.
  – Delete existing teams.
- **Make team administrator a team member**
  Using this icon, every team administrator can withdraw Team Administrator privileges from another team administrator of the same team.

> ***NOTICE:*** Other team administrators are not entitled to withdraw the team administrator privileges from the team creator.

- **Select team** combo box
  A click on this combo box displays a list of all teams you have been added to or that you have created as team administrator. You can select a team in this list. The team members are listed in the **Team View** window.
- Presence status of a team member
  The **Team View** shows you the presence statuses of other team partners:
  – **Available**
  – **Unavailable** or the person does not allow monitoring his/her presence status or presence information cannot be displayed because the team member has not yet accepted the team prompt.
  – **Do not disturb**
  – **Be right back**
  – **Busy**
  – **In a meeting**
- **Name** of the team member
  With a click on **Name** you can sort the team members alphabetically by their names.

> ***NOTICE:*** The name of the team administrator is highlighted.

- **Number** of the team member
  With a click on **Number** you can sort the team members in descending or ascending order by their phone numbers.

  > ***NOTICE:*** The number of the team administrator is highlighted.

- Display the partner journal
  This icon is only displayed if the relevant team partner has allowed other users to access his/her journal (All Calls). With a click on this icon you can have the **Journal** of the selected team partner displayed.

  > ***NOTICE:*** In the journal of the team partner you see question marks instead of the names of his/her private contacts by default. However, the system administrator can change this representation across the system.

  > ***NOTICE:*** Phone numbers displayed to a user in a partner journal via the **Team View** are represented in exactly the same way as in the **Journal** of the relevant partner. This representation depends on the numbering plan of the respective partner. As a result, a phone number may be displayed in the partner journal in a format that the monitoring user cannot dial.

- Displaying a team member's telephone status
  If a team partner has accepted your team prompt, one of the following icons is displayed. This is independent from whether or not he/she has allowed you to see his/her presence status also.
  – This icon indicates that the team partner has allowed you to monitor his/her presence status and that his/her telephone is ready for a call. With a click on you can directly initiate a call to the team partner via the **Team View**.
  – This icon indicates that the team partner has allowed you to monitor his/her presence status and that his/her telephone is currently busy.
  – This icon indicates that the team partner has not allowed you to monitor his/her presence status.

3 General Main Menu Settings

You can configure basic functions and features via the general settings in the main menu under **menu > General ...** .

These settings are combined in three groups:

- **Common**
  Basic settings for representing the web interface, for managing the configured devices and named device lists as well as for defining call forwardings. Via this tab you can additionally define the call types to be logged in the journal and whether you wish to be notified about missed calls by e-mail.
- **Presence**
  This tab serves for setting your presence status and controlling the display of your presence status to other OpenScape UC Application users.
- **Addresses**
  Settings for importing/exporting address data from and to other directories and for managing address groups.
- **Team**
  Team administrators are here provided with settings for managing their teams. Each team member uses this setting to manage the already granted privileges **Monitoring of the own Device** and **Journal Accessibility**.

The single groups are subdivided and represented as tabs with corresponding subordinate tabs in the **General Settings** dialog. They are described in detail in the following sections.

3.1 Common

On the **Common** tab you perform the basic settings for working with the web interface.

This tab is split up in the following tabs:

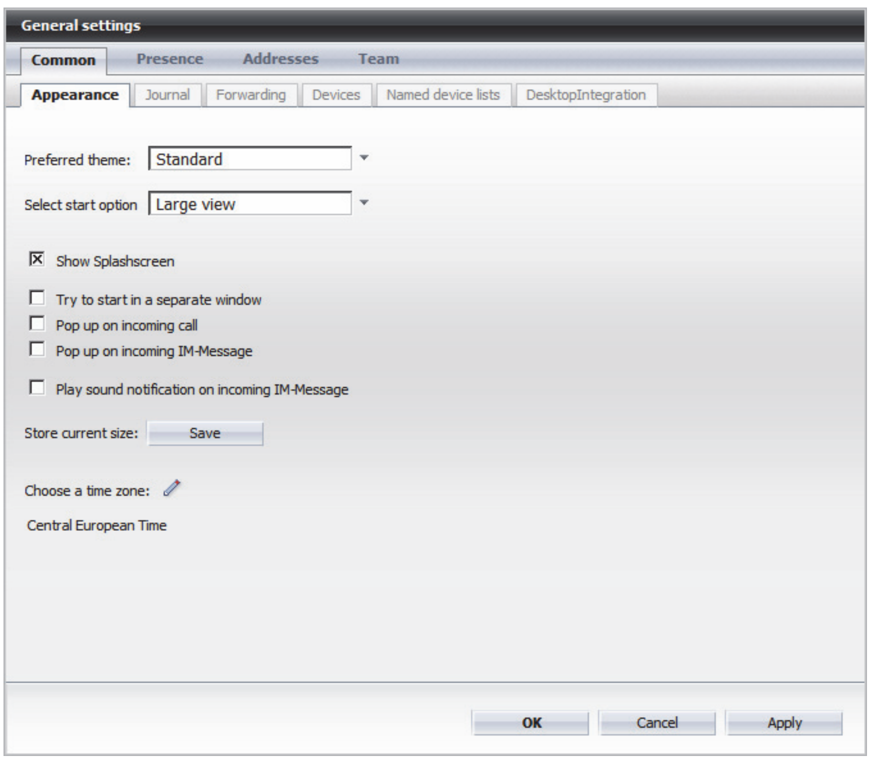
- **Appearance**
  On this tab you set the theme you prefer for the user interface. In addition, you can select the mobile time zone to be currently used.
- **Journal**
  On this tab you perform the settings for logging calls and for the missed-call notifications.
- **Forwarding**
  On this tab you perform the call forwarding settings.
- **Devices**
  On this tab you manage your devices. You can add further devices to be used, modify device settings and delete device definitions no longer required from the device list.

- **Named device lists**
  On this tab you can create phone number lists that you can select as preferred device. Via the named device lists you can flexibly administrate the call order of the preferred devices.
- **DesktopIntegration**
  Using the information on the **DesktopIntegration** tab you can download a small program at your workstation that allows calling a subscriber from any application.
  Furthermore, incoming calls and instant messages are signalled via the OpenScape Desktop Integration even if the OpenScape Web Client screen is closed.
  In the OpenScape Desktop Integration application you can set further start behavior, view and notification options.

3.1.1 Appearance

You define the theme you prefer for the web interface on the **Appearance** tab.

You reach this settings dialog via the main menu under **menu > General ... > Common tab > Appearance tab**.



In this dialog the following options are available:

- **Preferred theme**
  This combo box lets you select the web interface design you like most. The options **Standard** and **Crystal Sea** are available by default.

> ***NOTICE:*** All illustrations in this manual show the **Standard** theme.

- **Select start option**
  Use this combo box to determine the appearance of the user interface at the application's start. The following settings are available:
  - **Restore last view**
    Opens the application with the view that was set the last time you quit the application.
  - **Large view**
    The application opens with the large view of the user interface.
  - **Small view**
    The application opens with the small view of the user interface.
  - **Compact view**
    The application opens with the compact view of the user interface.

The following options are all selectable via check boxes:

- **Show Splashscreen**
  Shows the application splashscreen after the application's start. Without any further user action the OpenScape Web Client is displayed in the currently open browser window. With a click on the splashscreen the OpenScape Web Clientis displayed in a separate window.
- **Try to start in a separate window**
  If you select this option, the application always appears in an individual window if possible.
- **Pop up on incoming call**
  If the OpenScape Web Client browser window is placed in the background and thus hidden by other application windows or minimized, you can set this option to make OpenScape Web Client move to the foreground when a call comes in.

> ***NOTICE:*** For the time being, this function has been successfully tested for use with Internet Explorer 8 and 9 on the operating system Microsoft Windows 7 only.

> ***IMPORTANT:*** When a call comes in, the browser window of the OpenScape Web Client is moved to the foreground only if no other application window is maximized on the desktop at the same time and OpenScape Web Client is the only tab opened in the web browser.

- **Pop up on incoming IM-Message**
  If the OpenScape Web Client browser window is placed in the background and thus hidden by other application windows or minimized, you can set this option to make OpenScape Web Client automatically move to the foreground when an instant message comes in.

  > ***NOTICE:*** For the time being, this function has been successfully tested for use with Internet Explorer 8 and 9 on the operating system Microsoft Windows 7 only.

  > ***IMPORTANT:*** When an instant message comes in, the browser window of the OpenScape Web Client is moved to the foreground only if no other application window is maximized on the desktop at the same time and OpenScape Web Client is the only tab opened in the web browser.

- **Play sound notification on incoming IM-Message**
  When you activate this option, the OpenScape Web Client will notify you about every new chat message by sounding a default tone. The option is active by default.

Furthermore, you can perform the following additional settings in this dialog:

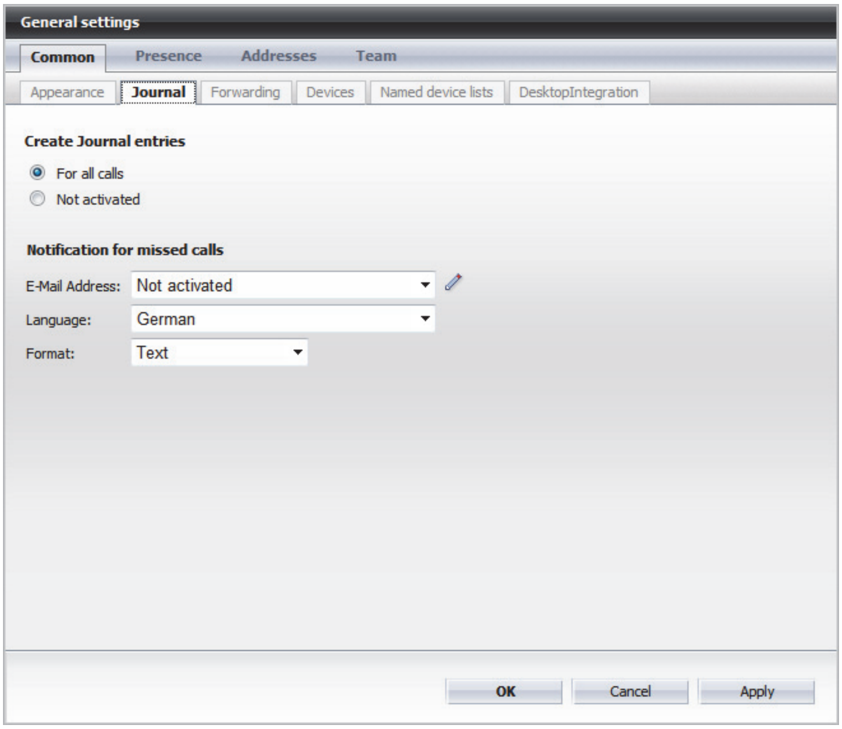
- **Store current size**
  With a click on the **Save** button you can save the current window size when you shut down the application. Next time you start the application it appears in the window size used last.
- **Mobile time zone**
  Using the icon you can set the time zone to be displayed for you in the **Journal**. This is useful when you are in a different time zone, working from there with the OpenScape Web Client. The event time is then displayed in local time. You can switch the **Journal** entries display from local time to the time of the configured **mobile time zone** and vice versa with a click on in the toolbar. Other OpenScape UC Application users who you have as contacts in your contact list see your **current time** when they hover the mousepointer on your presence status symbol. In this case this is the local time you have previously set as **mobile time zone**.

After you have set the GUI appearance you choose from the following options:

- Click on the **Apply** button to save your settings without closing the **General Settings** dialog.
- Click on **OK** to save your settings and to close the **General Settings** dialog.
- Click on the **Cancel** button to close the **General Settings** dialog without saving the settings already performed.

3.1.2 Journal

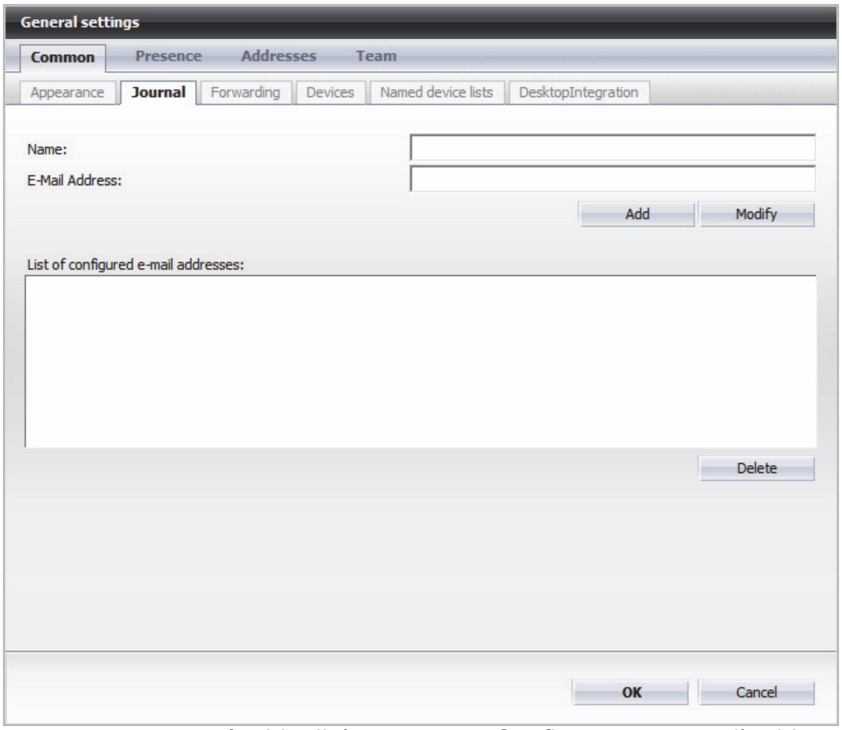
On the **Journal** tab you perform the settings for creating the journal entries and for the notification feature. You reach this setting dialog via **menu > General ... > Common tab > Journal tab**.



The following options are available:

- **Create Journal entries**
  Select one of the following options for your journal entries:
  - **For all calls**
    Creates journal entries for all calls
  - **Not activated**
    Disables creating journal entries.
- **Notification for missed calls**
  Here you can specify where to, in which language and in which format a notification for missed calls shall be sent. You can set the following combo boxes:
  - **E-Mail Address**
    The default setting for the missed-calls notification is **Not activated**. If you would like to be notified about missed calls, select the e-mail address the notification is to be sent to via the combo box. If this option is not available,

you need to create an e-mail address first to which the notification is to be sent. You can create a list of e-mail addresses by enabling . The following dialog opens:



In this dialog you can: Configure new e-mail addresses via the **Add** button, edit e-mail addresses via the **Modify** button, or remove them from the **List of configured e-mail addresses** via the **Delete** button.

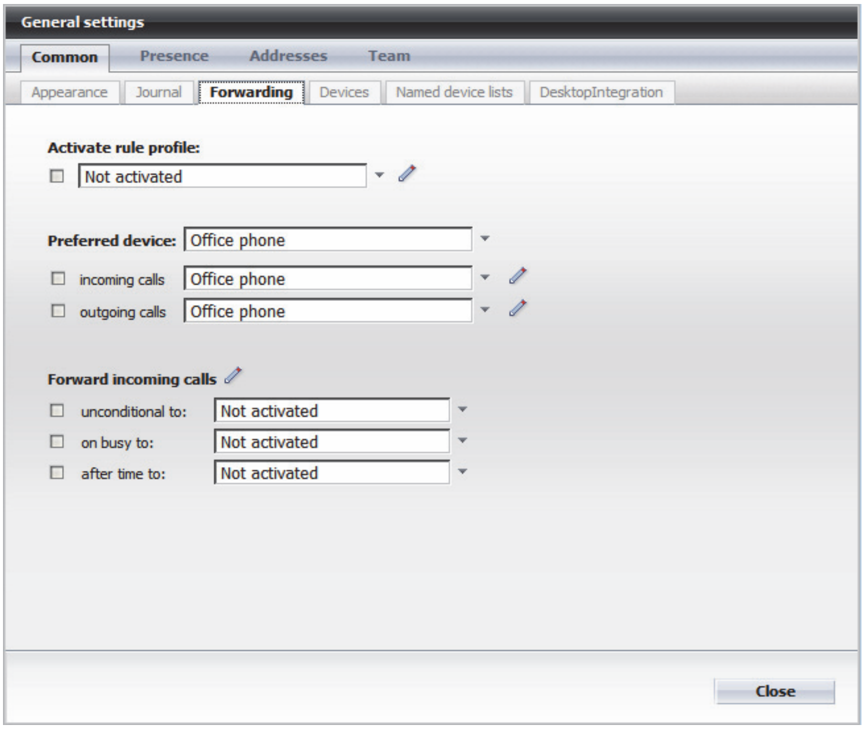
– **Language**
  Use this combo box to select the notification language.
– **Format**
  Use this combo box to specify the notification format. The following table provides an overview of available message formats:

Format	Description
HTML (default setting)	The advantage of this format is that it integrates a button in the notification via which the originator can be immediately called. If you want to use this feature, the e-mail client on which the notification is received must support the HTML format and JavaScript must be active.
Text	In the case of the Text format the pure notification text is transmitted only. Instead of the return call button a link is contained for a requested return call.
SMS format	The SMS format is a pure text format as well. But since the size of a cell phone display is very limited, the notification is used here in short form.

3.1.3 Forward Call

On the **Forwarding** tab you perform the settings for the call forwarding.

You reach this setting dialog via **menu > General ... > Common tab > Forwarding tab**.



The following options are available:

Activate rule profile

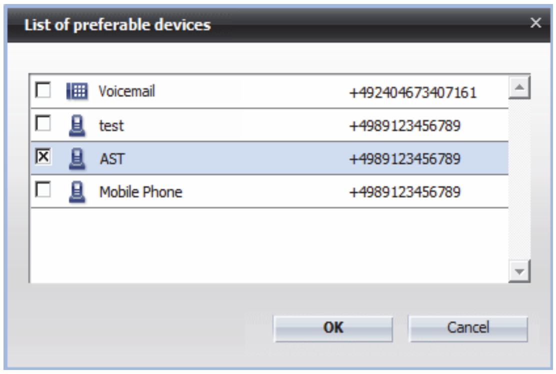
If you want to configure the call forwarding according to a rule profile you have defined, select the corresponding rule profile via the combo box. To edit rule profiles (adding, modifying or deleting), you can click on to open the **Rules** dialog.

Please note that the call forwarding may pose problems if you configure other forwarding options in addition. In this case an error message will inform you.

Preferred device

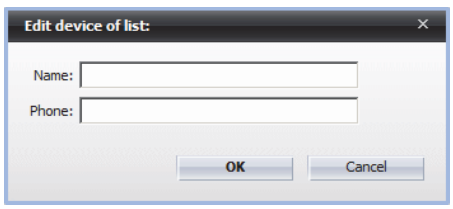
Use this combo box to select the device you prefer for the *One-Number Service* if this device is to be indicated on the caller side with incoming as well as outgoing calls.

- **incoming calls**
  Use this combo box to select the device you prefer for the *One-Number Service* with incoming calls. If you want to edit the list of preferred devices (adding, modifying or deleting), you can click on to open the **List of preferable devices** dialog for direct editing.



  In this dialog you can:

  – Create a new entry - opens the **Edit device of list** dialog in which you can enter a new **Name** and a new **Phone**number.



  – Change an entry - opens the **Edit device of list** dialog in which you can edit an existing **Name** and/or the associated **Phone**number.

  – Delete an entry - removes a selected entry from the **List of preferable devices**.

- **outgoing calls**
  Use this combo box to select the device you prefer for the One-Number Service with outgoing calls. If you want to edit the list of preferred devices (adding, modifying or deleting), you can click on to open the **List of preferable devices** dialog for direct editing.

Forward incoming calls

Use this combo box to select the device to be displayed to the caller in case of an outgoing call.

Via you can directly select one of the devices you have configured on the **Devices** tab for call forwarding. The **List of preferable devices** dialog opens.

Three further combo boxes are available to specify conditions for the call forwarding. The following conditional forwardings are possible:

- **unconditional to**
  Use this combo box to select the device that is forwarded to if the forwarding is to occur without condition.

- **on busy to**
  Use this combo box to the select the device that is forwarded to if your office phone is engaged.

  > ***NOTICE:*** This feature is only available for specific PBXs.

- **after time to**
  Use this combo box to select the device that is forwarded to if the specified ring time of the device is exceeded.

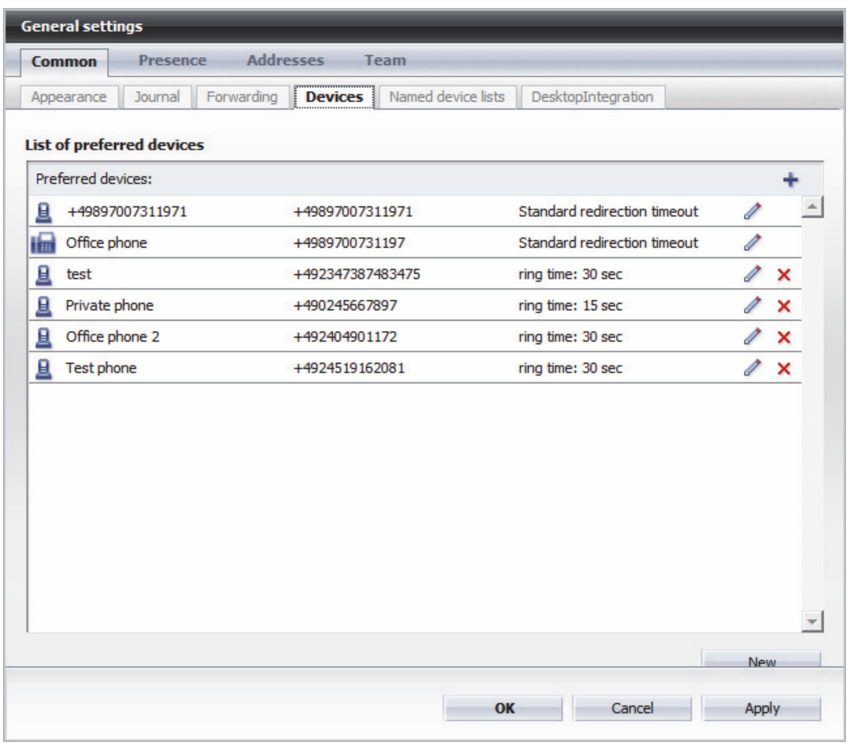
  > ***NOTICE:*** This feature is only available for specific PBXs.

Click on the **Close** button to save your settings and close the **General settings** tab.

3.1.4 Devices

On the **Devices** tab you manage the devices you use.

You reach this setting dialog via **menu > General ... > Common tab > Devices tab**.



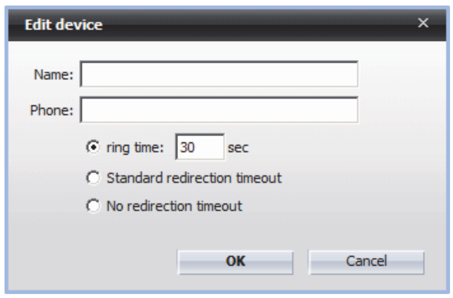
On this tab you can add further devices to be used, modify device settings and delete devices no longer required from the device list. You can then select the single devices in the main menu via the **device display** combo box.

IMPORTANT: The members of a Multi-Line Hunt Group (MLHG) must not configure their voicemail box as preferred device for incoming and/or outgoing calls.

You can execute the following actions on this tab:

- **Configuring a new device**

  A click on or on the **New** button opens the following dialog in which you can add a new device to your device list.



NOTICE: Depending on your profile settings in the CMP, the and **New** buttons for configuring a new, preferred device may be hidden. In this case you cannot add any number of your own devices to your OpenScape UC Application device list. You can still use your ONS number and the already configured devices.

  – Enter an expressive name for the device in the **Name** field. Under this name the device is displayed in the list and in the selection fields.
  – Enter the phone number of the new device in the **Phone** field.
    The following characters are allowed: the digits from 0 to 9, "()", "+", "-" as well as blanks. In case of local phone numbers you can enter only the respective extension, for example `123`. External phone numbers require

specifying the complete number starting with "+", for example `+490(700)512 - 456`. Before the performed settings are saved, each phone number is automatically normalized.

Normalizing a phone number means that it is converted in a permanently defined default representation from any representation format. A phone number is always normalized when it is to be searched for or passed on to another system that expects a defined phone number format.

The list of preferred devices itemizes all configured devices and their normalized phone numbers. For example, phone number `+490123456123` is displayed for the device with the extension `123` and phone number `+490700512456` has been assigned to the device with the external phone number `+490(700)512-456`.

In this dialog you can perform the following ring time settings. After this ring time has expired, the ring tone is automatically switched over to the next configured device:

– **ring time: <number>sec.**
  Here you can set the desired ring time in seconds or adopt the default value **30** seconds. When the individual or default ring time has expired, the ring tone is automatically switched over to the next configured device.
– **Standard redirection timeout**
  After the ring time defaulted by the PBX has expired, the ring tone is automatically switched over to the next configured device.
– **No redirection timeout**
  The ring tone is not switched over to another configured device.

A click on the **OK** button closes the dialog. Your settings are saved.

A click on the **Cancel** button closes the dialog. The performed settings are then dismissed.

- **Modifying the settings of a list entry**

  Click on to edit a previously selected list entry. The above dialog **Edit device** opens with the available settings. The phone number of the device is grayed out and cannot be changed. Modifications to other options are possible.

- **Removing a device from the list**

  With a click on × you can remove a selected device from the list of configured devices.

IMPORTANT: The *One-Number Service* (by default the topmost entry in the list) and the device currently used cannot be deleted.

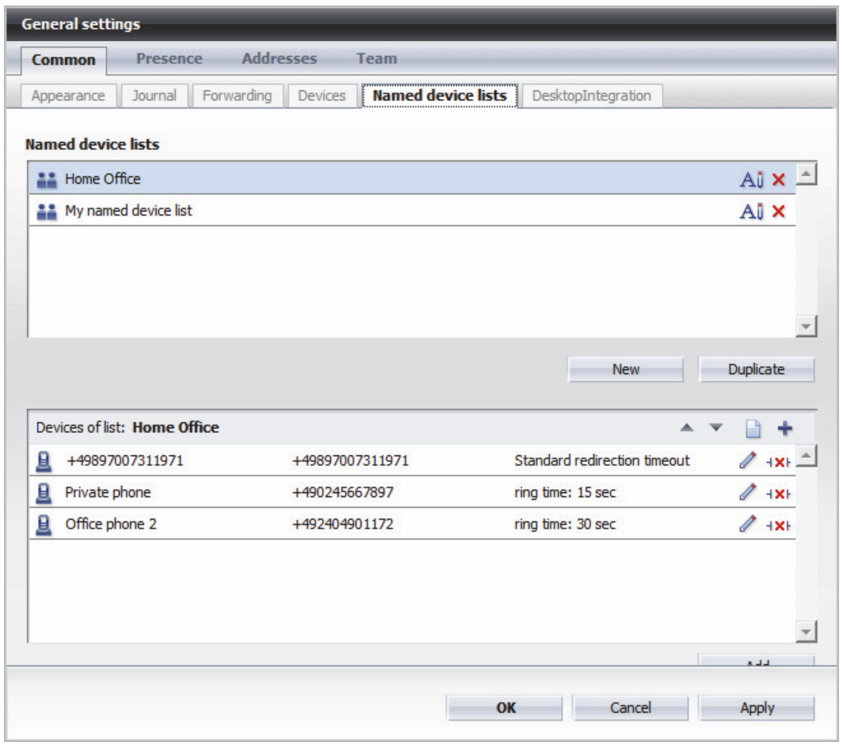
NOTICE: Depending on your profile settings as OpenScape UC Application user in the CMP, the × icon may be hidden. In this case there is no way to remove the corresponding device from your OpenScape UC Application device list.

3.1.5 Named Device Lists

On the **Named device lists** tab you define the named device lists available for selecting the preferred device, configuring a call forwarding or routing rules.

> ***IMPORTANT:*** The members of a Multi-Line Hunt Group (MLHG) must not configure a named device list as preferred device for incoming and/or outgoing calls.

You reach this settings dialog via **menu > General ... > Common tab > Named device lists tab**.



On this tab you can create phone number lists that you can select as preferred device. Via the named device lists you can flexibly administrate the call order of the preferred devices. You can, for example, create/delete new named device lists or add single entries to a named device list/remove them from a named device list.

The device priority list is processed from top to bottom and switches the ring tone automatically to the next device after the configured ring time has expired.

The **Named device lists** tab is divided into two sections:

- **Named device lists** - all configured named device lists are listed here.
- **Devices of list:** - here you find a list of phone numbers assigned to a named device list selected in the **Named device list** section.

Controls in the "Named device list" section

The following controls are available in the **Named device list** section:

- - Rename named device list
  Click on this icon to modify the name of a named device list.

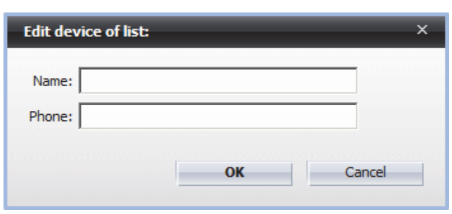
  > ***NOTICE:*** You can also click the name of the named device list directly to rename it.

- - Delete named device list
  Click on this icon to remove a named device list from the list. The named device list is removed from the list after a confirmation prompt.
- **New** - Create a new named device list
  Click on this button to create a new named device list.
- **Duplicate** the current named device list
  With a click on the **Duplicate** button you can create a new named device list by duplicating an already existing one.

Controls in the "Devices of list" section

The following controls are available in the **Devices of list** section:

- - Move selected phone number up
  Click on to move a selected device entry up the list. This increases the call priority for this device.
- - Move selected phone number down
  Click on to move a selected device entry down the list. This decreases the call priority for this device.
- - Add phone numbers from list
  Click on this icon to add further devices from the **List of preferable devices**. Another dialog opens that lists all configured devices. You can select one or several devices by ticking the respective check boxes. A click on the **Add** button closes the dialog and confirms your selection. The new device appears in the list of phone numbers assigned to the named device list.
- - Click on this icon to add new phone numbers to the **List of preferable devices**. The following dialog opens:



> ***NOTICE:*** Depending on your profile settings as OpenScape UC Application user in the CMP, the icon may be hidden. In this case there is no way to add any number of your own devices to the selected named device list or to your OpenScape UC Application device list. You can still use your ONS number and the already configured devices.

- - Edit entry
  Click on this icon to change an existing phone number entry.
- Delete entry
  Click on this icon to remove a phone number entry from the named device list.
- **Add** - The function of this button is identical to the function of the (add phone numbers from list) icon.

3.1.6 Desktop Integration

Using the information on the **DesktopIntegration** tab you can deploy a small program at your workstation for calling a subscriber from any application with the help of a *hotkey* you have defined.

> ***NOTICE:*** Depending on the configuration of the OpenScape UC Application server the **DesktopIntegration** tab may be hidden.

> ***NOTICE:*** The OpenScape Desktop Integration is not supported with the Safari 5 browser for Mac OS and Microsoft Windows.

Example:

A *Microsoft Word* document you have opened contains a phone number. Select this phone number in the text and enable the hotkey you have defined for this purpose. A call to this number is immediately initiated.

Furthermore, incoming calls and instant messages are signalled via the OpenScape Desktop Integration even if the OpenScape Web Client screen is closed.

In the OpenScape Desktop Integration you can set further start behavior, application window view and notification options.

> ***NOTICE:*** To use this application program the OpenScape Web Client need not be started.

Application requirements

You need to heed the following requirements for using the OpenScape Desktop Integration:

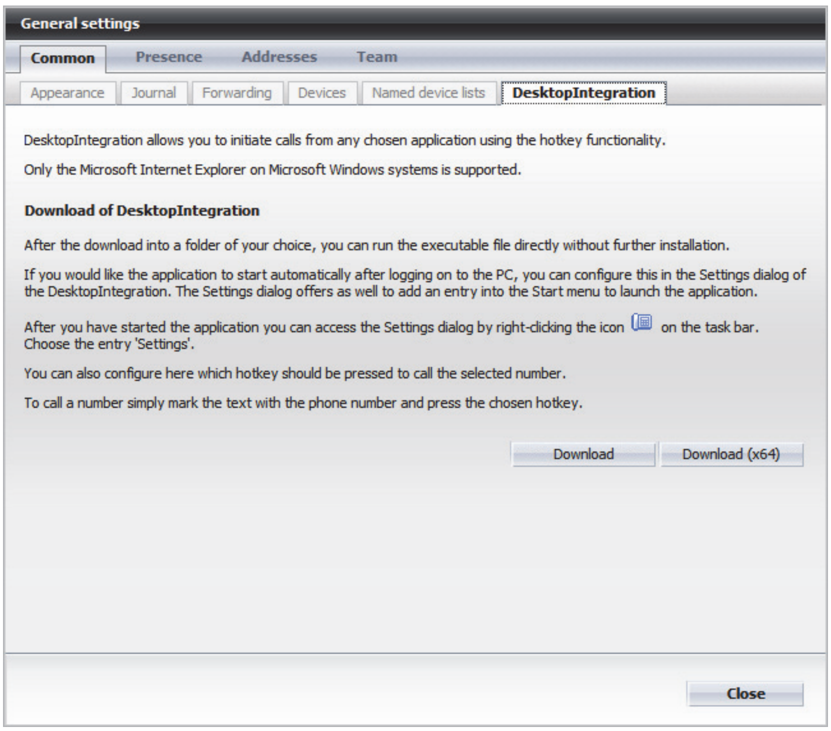
- You can use the OpenScape Desktop Integration with a Microsoft Windows operating system only.
- If you wish to use the OpenScape Desktop Integration be sure to download the application via the OpenScape Web Client URL that you use for the OpenScape Web Client by default. This URL must contain the FQDN of the OpenScape Web Client system to avoid possible certificate errors.

- Since incoming calls and instant messages are signalled via the OpenScape Desktop Integration a firewall used on your workstation must be configured accordingly.
  The ports to be released are:
  – For **http://** Port `7789 TCP` and/or
  – For **https://** Port `8443 TCP`

> ***NOTICE:*** Depending on the configuration by the administrator, various options may be hidden.

Downloading the application

You download the application on the **DesktopIntegration** tab found under **menu > General ... > Common**.



You find detailed instructions for setting up and operating the OpenScape Desktop Integration in the manual *OpenScape UC Application V7 Client Applications*.

Close the **DesktopIntegration** tab via the **Close** button. This also closes the **General Settings** dialog.

3.2 Presence

You inform the other OpenScape UC Application users in your presence setting in which working status you currently are. Only the OpenScape UC Application users authorized by you can see your presence status.

> ***NOTICE:*** Do not forget to always set your current presence status so that your colleagues always know whether or not they can contact you.

The **Presence** tab is, besides the combo box  **presence display** in the main menu, another option to set your presence status.

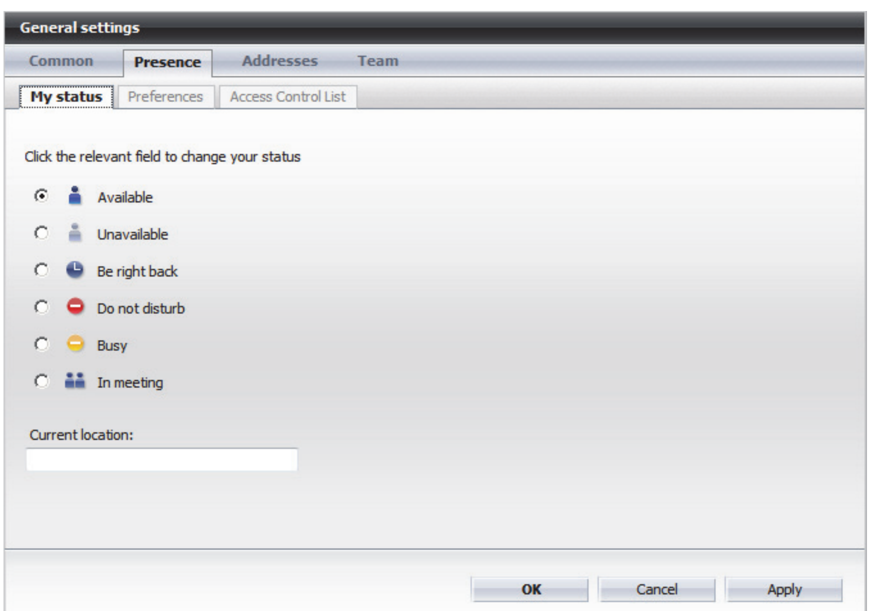
You reach this dialog via **menu > General... > Presence tab**.

The **Presence** tab contains further tabs, which provide setting options for the following areas:

- **My Status**
  On this tab you set your presence status.
- **Preferences**
  Via this tab the presence settings after starting and ending the program as well as the behavior in case of status changes are defined.
- **Access Control List**
  Via this tab you administrate the presence prompt behavior and the users who are allowed to view your presence status.

3.2.1 My Status

On the **My status** tab you can make your presence settings.



Set the desired radio button to determine your status. You can select one of the following presence statuses:

- **Available**
  Signal for the other OpenScape UC Application users that you can be reached at your workstation.
- **Unavailable**
  Signal for the other OpenScape UC Application users that you cannot be reached at your workstation.
- **Do not disturb**
  Signal for the other OpenScape UC Application users that you can be reached at your workstation but do not wish to be disturbed.
- **Be right back**
  Signal for the other OpenScape UC Application users that you have left your workstation for a short period.
- **Busy**
  Signal for the other OpenScape UC Application users that you can be reached at your workstation but only want to be disturbed in urgent cases.
- In a meeting
  Signal for the other OpenScape UC Application users that you are currently in a meeting and cannot be reached.

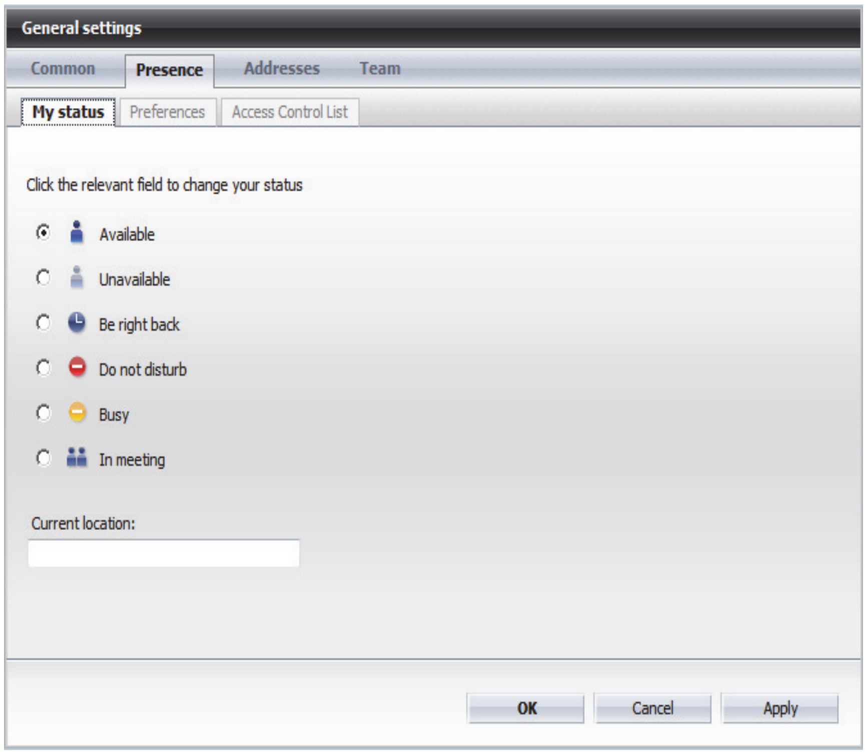
In the **Current location** field you can specify your current location as text entry. This text is also displayed as quick info.

After setting the desired presence status you can use the following controls:

- Click on the **Apply** button to save your settings without closing the **General Settings** dialog.
- Click on **OK** to save your settings and to close the **General Settings** dialog.
- Click on the **Cancel** button to close the **General Settings** dialog without saving the settings already performed.

3.2.2 Preferences

On the **Preferences** tab you define the presence settings after starting and ending the program as well as the behavior in case of status changes.



The following settings are available:

- **Status at login**
  Use this combo box to select the presence status to automatically apply for you after logging in at the system.

  > ***NOTICE:*** If you select the "---" setting, the presence status you have set last will be displayed again after you have logged in at the system.

- **Status when closing the Web Client**
  Use this combo box to select the presence status to apply after you have closed the program or logged off from the system.

  > ***NOTICE:*** If you select the "---" setting, the presence status you have set last will be displayed again after you have logged in at the system.

- **Behavior after Presence status changes**
  You can specify a preferred device for any presence status. By setting the respective check box define for which statuses a preferred device is to be used for status changes. Then use the corresponding combo box to select the device you would like to deploy in this case for your incoming calls.

  > ***NOTICE:*** If you select the setting "---" for a presence status, the device currently used is kept when changing to this presence status.

- **Automatic status evaluation**
  Via this combo box you can configure whether to allow one or two calls for your busy telephone before the availability display of your extension changes from status "free" (or) to status “busy” (or) in the other OpenScape UC Application users' contact lists.
  The default value is `1`. That means that your telephone availability display only changes to the “Busy” state if you call from one of your extensions.
  If you do not want the availability display to change to status “busy” until a second call arrives, set the value to `2` in the combo box.

After setting the desired presence status you can use the following controls:

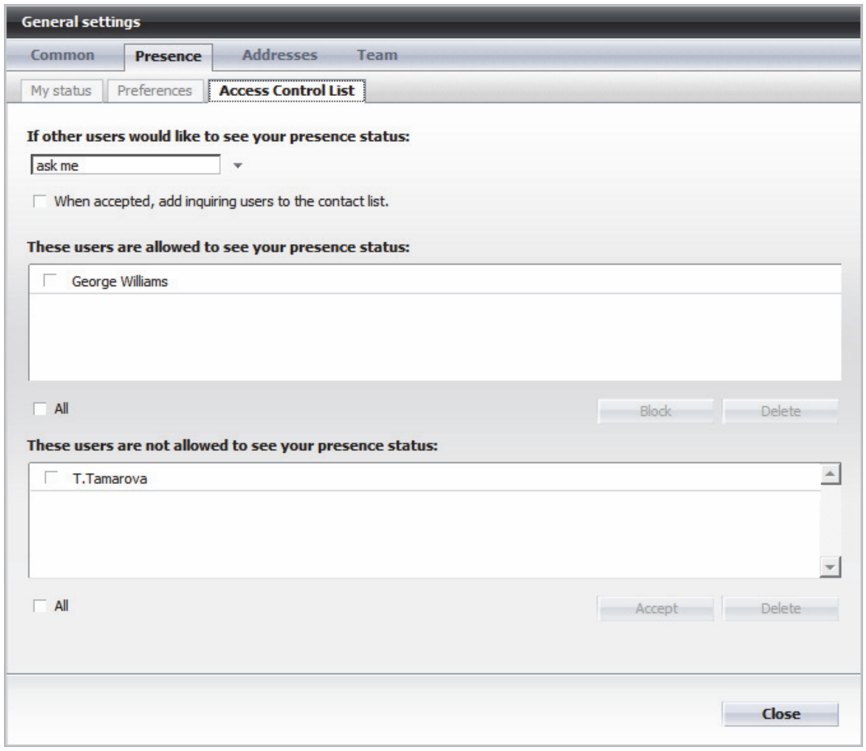
- Click on the **Apply** button to save your settings without closing the **General Settings** dialog.
- Click on **OK** to save your settings and to close the **General Settings** dialog.
- Click on the **Cancel** button to close the **General Settings** dialog without saving the settings already performed.

3.2.3 Access Control List

On this tab you define the presence prompt behavior and manage the users who are allowed to view your presence status.

Using the options in the **If other users would like to see your presence status** combo box you can determine the program's behavior in the case that other users wish to see your presence status. Depending on the option you select from the available three options, this tab provides further settings and information. The following options are available:

- **ask me**
  With this option having been set you will always be asked whether the requesting user shall be permitted to see your presence status. The **Access Control List** tab may look like this:

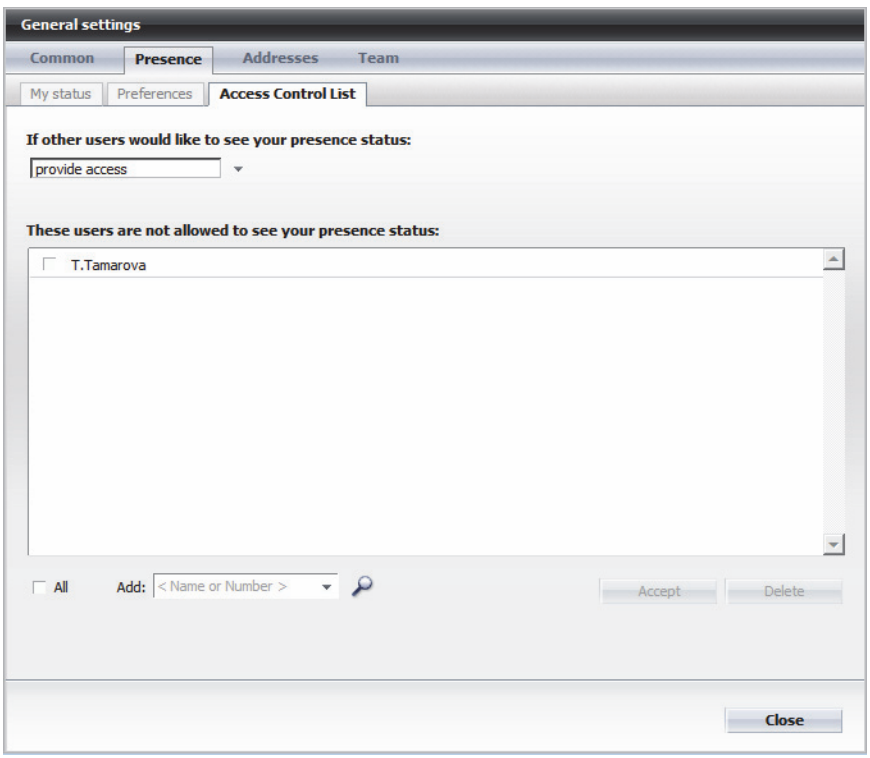


  – **When accepted, add inquiring users to the contact list.**
    If OpenScape UC Application users who send you a presence request that you accept are to be integrated in your private contact list automatically, tick this check box.

  – **Users who are allowed to see your presence status**
    Users who may know your presence status are listed under **These users are allowed to see your presence status**.
    All - Activating this check box selects all users in the list. You can then move them to the list of users who must not see your presence status or remove them from the current list.
    Block - With this button you can withdraw the right to see your presence status from one or several user(s). To do so, activate the check box next to the relevant user's name and click on **Block**. The selected user is moved to the list of users who are not allowed to see your presence status.
    Delete - This button lets you remove one or several user(s) from the list. To do so, activate the check box next to the relevant user's name and click on **Block**. Thereafter, no information is available as to whether or not the contact may see your presence status.

– **These users are not allowed to see your presence status:**
Users who must not know your presence status are listed under **These users are not allowed to see your presence status**.
All - Activating this check box selects all users in the list. You can then move them to the list of users who may see your presence status or remove them from the current list.
Accept - With this button you can grant one or several user(s) the right to see your presence status. To do so, activate the check box next to the relevant user's name and click on **Accept**. The users are moved to the list of users who may see your presence status.
Delete - This button lets you remove one or several user(s) from the list. To do so, activate the check box next to the relevant user's name and click on **Block**. The corresponding user will not receive any information about your presence status anymore.

- **provide access**
This option determines that all requesting users are automatically allowed to view your presence status. The **Access Control List** tab may look like this:



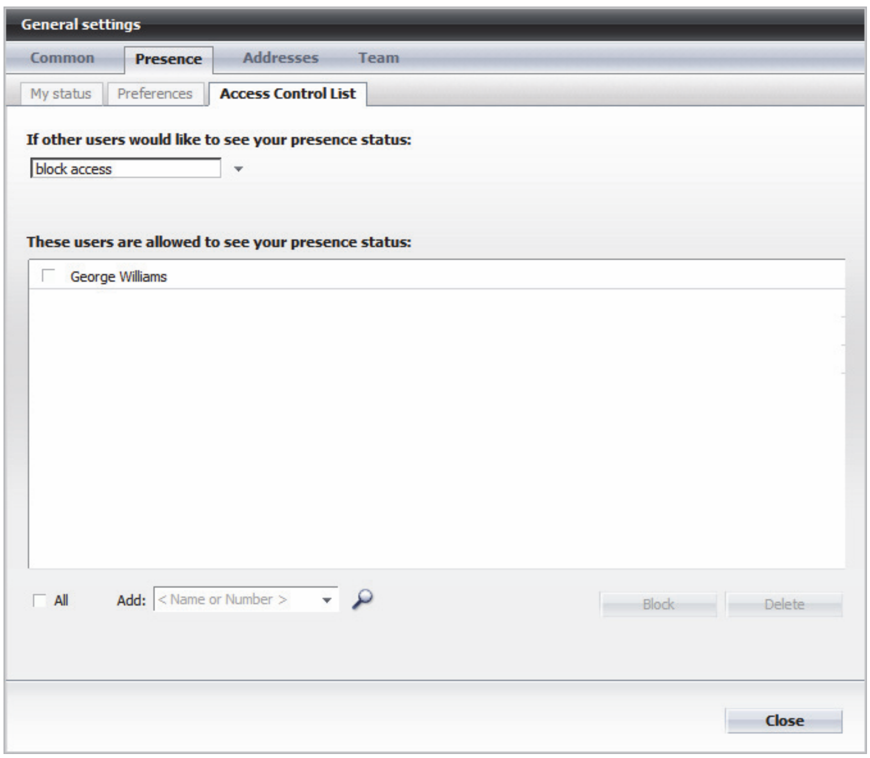
– **These users are not allowed to see your presence status:**
Users who must not know your presence status are listed under **These users are not allowed to see your presence status**.
All - Activating this check box selects all users in the list. You can then move them to the list of users who may see your presence status or remove them from the current list.
Add - Via this option you can find an OpenScape UC Application user in pre-configured directories to withdraw the privilege to see your presence status from him/her. After you have specified a name or phone number in the **<Name or Number>** input field and clicked on 🔎 , the search for the

desired user starts in all directories. The search hits are then listed in the **Directory Search** window. With a click on the **OK** button and after accepting the confirmation prompt the selected user is integrated in the list of users who must not see your presence status.

Accept - With this button you can grant one or several user(s) the right to see your presence status. To do so, activate the check box next to the relevant user's name and click on **Accept**. The users are moved to the list of users who may see your presence status.

Delete - This button lets you remove one or several user(s) from the list. To do so, activate the check box next to the relevant user's name and click on **Block**. The corresponding user will not receive any information about your presence status anymore.

- **block access**
  This option determines that none of the requesting users are allowed to view your presence status. The **Access Control List** tab may look like this:



– **Users who are allowed to see your presence status**
  Users who may know your presence status are listed under **These users are allowed to see your presence status**.
  All - Activating this check box selects all users in the list. You can then move them to the list of users who must not see your presence status or remove them from the current list.
  Add - Via this option you can find an OpenScape UC Application user in pre-configured directories to grant him/her the privilege to see your presence status. After you have specified a name or phone number in the **<Name or Number>** input field and clicked on , the search for the desired user starts in all directories. The search hits are then listed in the

Directory Search window. With a click on the **OK** button and after accepting the confirmation prompt the selected user is integrated in the list of users who may see your presence status.

Block - With this button you can withdraw the right to see your presence status from one or several user(s). To do so, activate the check box next to the relevant user's name and click on **Block**. The selected user is moved to the list of users who are not allowed to see your presence status.

Delete - This button lets you remove one or several user(s) from the list. To do so, activate the check box next to the relevant user's name and click on **Block**. Thereafter, no information is available as to whether or not the contact may see your presence status.

3.3 Addresses

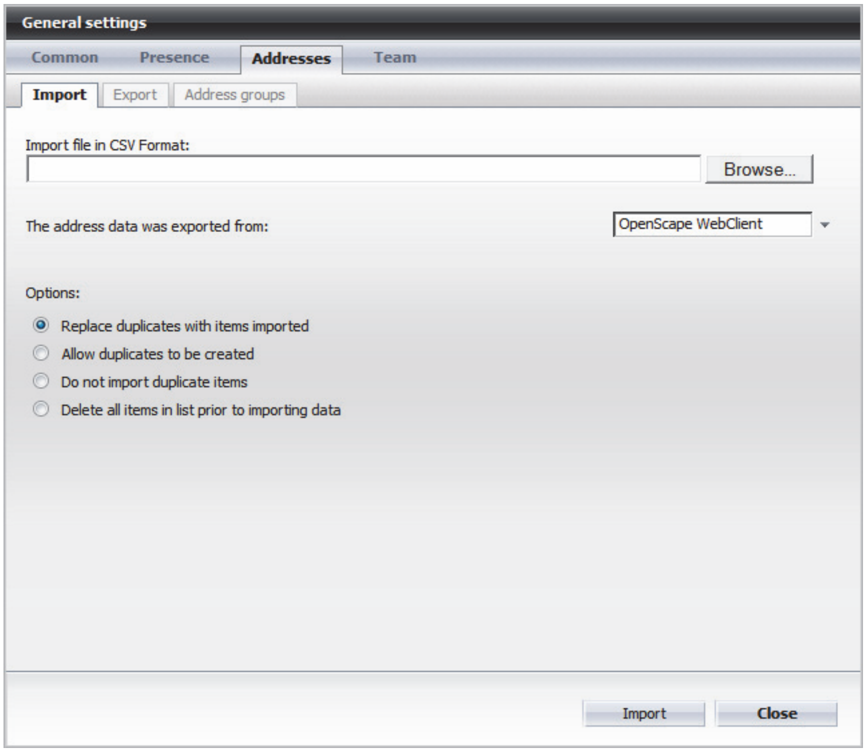
The **Addresses** tab serves for administering your address data. You reach this dialog via **main menu > menu > General ... > Addresses tab**.

The **Addresses** tab contains further tabs, which provide setting options for the following areas:

- **Import**
  On this tab you perform the address import settings.
- **Export**
  On this tab you perform the address export settings.
- **Address groups**
  On this tab you specify the groups for your contact administration.

3.3.1 Import

On the **Import** tab you can import address data from other address books. You reach this setting dialog via **menu > General ... > Addresses tab > Import tab**.



In this dialog the following setting options are available:

- **Import file in CSV Format:**
  In this input field you specify the storage location and name of the file you wish to import.

  > ***IMPORTANT:*** When importing address data from a CSV file, all characters from 0x7F up to and including 0x9F are filtered out to avoid security problems.

  > ***NOTICE:*** The extension of the import file need not necessarily read `.csv`. Import files are usually text files with the extension `.txt`.

  With a click on the **Browse** button you can alternatively open a file selection dialog to find the desired file.

- **The address data was exported from:**
  You use this combo box to specify the data source from which the data to be imported shall be retrieved.
  Among other things, language-dependent schemes in the eight supported languages, for example **MS Outlook English, MS Outlook Portuguese**, etc. are available for importing address data from Microsoft Outlook.

  > ***NOTICE:*** For importing data correctly you must know from which data source the import file was created. If you are unsure about the data source or cannot find the correct data format, please definitely consult your system administrator.

- **Options**
  You can set one of the following import options:
  - **Replace duplicates with items imported**
  - **Allow duplicates to be created**
  - **Do not import duplicate items**
  - **Delete all items in list prior to importing data**

  > ***NOTICE:*** Duplicates refer primarily to comparing names and phone numbers. If no phone numbers are available, e-mail addresses are used to identify duplicates. New data records are created for all other data; they are not searched for duplicates.

- **Import**
  A click on this button starts the import process.

  > ***NOTICE:*** As soon as the system executes the import process, your contact list is blocked from accessing for a short period. If you try to access the contact list within this period, a message informs you accordingly. Thereafter, you can work with your contact list as usual.

- **Close**
  A click on this button cancels or terminates the import process. The **General settings** dialog closes.

3.3.1.1 File Exchange Formats

File exchange via the CSV format

To exchange files between different databases, a text file is usually deployed in which the single elements are separated by commas. These file are called CSV (Comma Separated Value) files. This format is automatically generated upon a data export.

The service that prepares the address data for your contact list has an interface that can process this data format, thus enabling the import and export of address data.

Specialties when importing and exporting with IBM Lotus Notes

Please heed the following to ensure a smooth data exchange between IBM Lotus Notes and OpenScape UC Application:

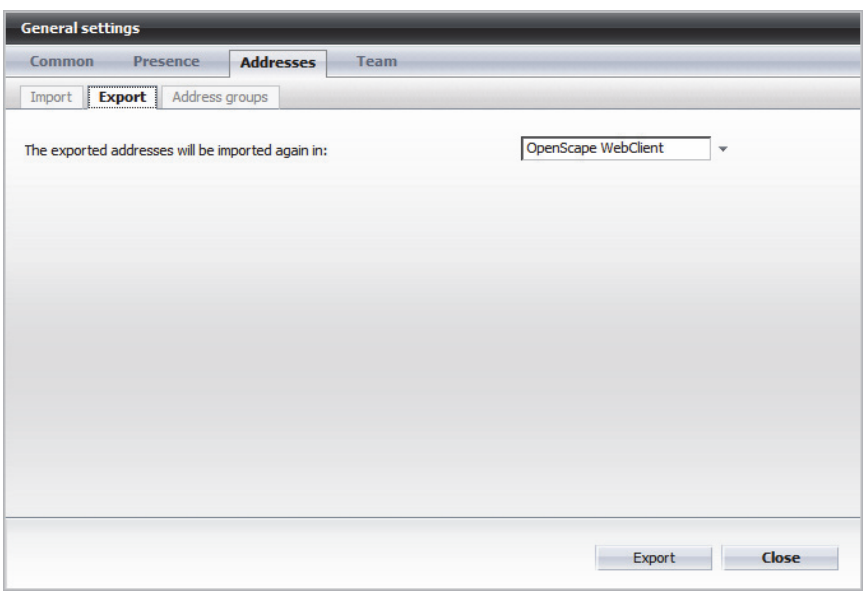
- Export from IBM Lotus Notes:
  - For the file export from IBM Lotus Notes select the Structured Plain Text format.
  - Select the **All documents** export option to export all contacts.
- Import to IBM Lotus Notes:
  - Select Structured Text as import format.

    NOTICE: The file to be imported must not have a file extension. Otherwise, the “Structured Text” option cannot be selected.

  - Import the file as “Main Document”.

3.3.2 Export

On the **Export** tab you can export address data in specific file formats for other applications. You reach this settings dialog via **menu > General ... > Addresses tab > Export tab**.



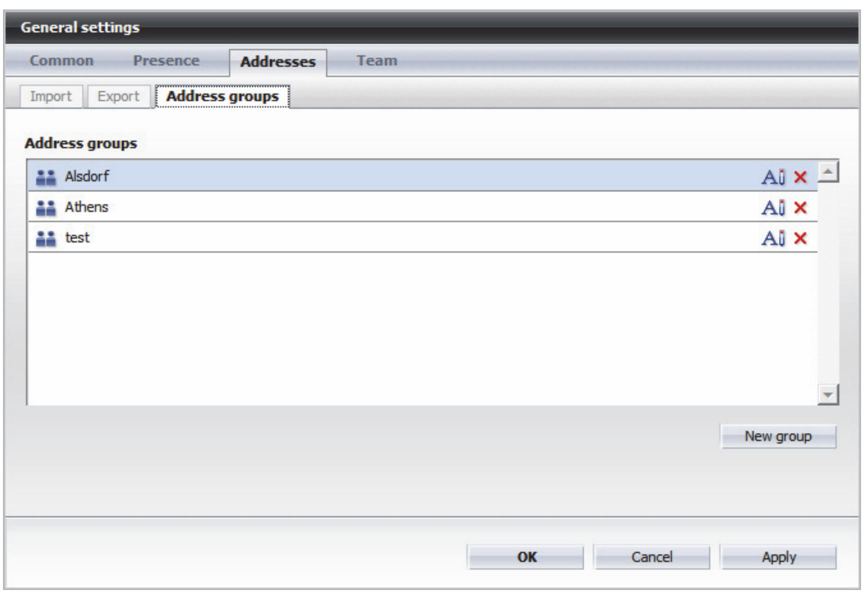
The following options are available in this dialog:

- **The exported addresses will be imported again in**
  Select the desired data format via this combo box for reimporting the exported addresses.
  In this context please note the following:
  - It is important to know for which application the address data are exported so that they can be successfully reimported. If you are not sure about the format to use or the desired format is not offered in the combo box, please consult your system administrator.
  - If you wish to export the address data as backup copy so that you can reimport it at a later date to restore your address list, select the OpenScape format.
  - If the export is performed for a reimport in Lotus Notes, the export file must not have a file extension. Otherwise, the Lotus Notes import feature will not accept this file.
- **Export**
  A click on this button starts the export process.
- **Close**
  A click on this button abandons or cancels the export process. The **General settings** dialog closes.

3.3.3 Address Groups

On this tab you can create groups for grouping contacts. You reach this setting dialog via **menu > General ... > Addresses tab > Address groups tab**.

You can create new address groups on this tab and remove existing ones from the address group list.



The following controls are available on this tab:

- - Click this icon to modify the name of an address group.

> ***NOTICE:*** You can also click the name of the address group directly to rename it.

- - Click this icon to remove an address group from the list.
- **New group** - Click this button to create a new address group. It appears as entry in the address groups list with the pre-defined name **new address group**.
- Click on the **Apply** button to save your settings without closing the **General Settings** dialog.
- Click on the **OK** button to save your settings and the **General Settings** dialog closes.
- Click on the **Cancel** button to close the **General Settings** dialog without saving the settings already performed.

3.4 Team

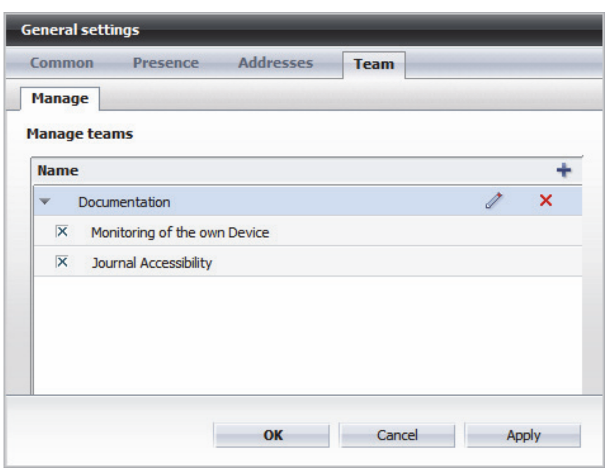
The **Team** tab features the **Manage** tab. It allows team administrators to manage teams and team members to determine which privileges shall be assigned to other team partners.

On the **Manage** tab, team administrators can view and manage the list of their own teams, create new teams as well as view the teams to which they have been added as member.

Team members reach the list of teams they have been added to as members via the **Manage** tab.

Management options for team administrators

The following figure exemplifies the **Manage** tab with the user having team administrator privileges.

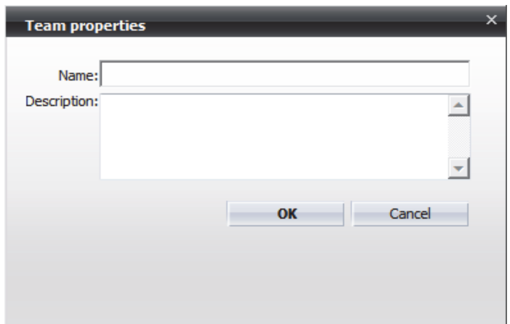


As team administrator you can access the following features:

- Create new team

  NOTICE: This feature is available only to OpenScape UC Application users who have been assigned the default **Team Administrator** profile or another profile with the privilege of **managing groups** by the OpenScape UC Application system administrator in the CMP.

  A click on this button opens the **Team properties** dialog:

  Specify the name for your team in the **Name** input field. The **Description** area provides the option to enter a descriptive text to associate the team name.

- Display or edit team privileges
  - **Monitoring of the own Device**
    By enabling this option you allow your team partners to accept calls on your behalf.
  - **Journal Accessibility**
    When you activate this option you grant your team partners the privilege to view your journal (the icon appears in the **Team View**). This enables your partners to access your call list (All Calls). Your team partners are not allowed to delete entries in your journal.
    The names of callers or callees are displayed to the team partners as question marks by default. However, the system administrator can change this representation across the system.

- Display team properties
  With a click on this icon you can have the **Name** and **Description** of the respective team to which you have been added as member displayed in the **Team properties** dialog. No changes can be made.

- Edit team properties
  With a click on this icon you can change the **Name**s and the **Description** of the respective team in the **Team properties** dialog.

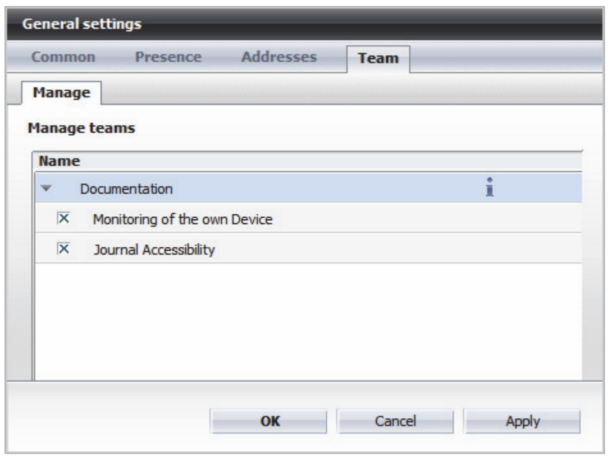
- × Delete team

NOTICE: This feature is available only to OpenScape UC Application users who have been assigned the default **Team Administrator** profile or another profile with the privilege of **managing groups** by the OpenScape UC Application system administrator in the CMP.

With a click on × you can delete the selected team.

Options for team members

The following figure exemplifies the **Manage** tab with the user not having been assigned team administrator privileges.



The following features are available to team members:

- Display or edit team privileges
  - **Monitoring of the own Device**
    By enabling this option you allow your team partners to accept calls on your behalf.
  - **Journal Accessibility**
    When you activate this option you grant your team partners the privilege to view your journal (the icon appears in the **Team View**). This enables your partners to access your call list (All Calls). The names of callers or callees are displayed to the team partners as question marks. Your team partners are not allowed to delete entries in your journal.
- Display team properties
  With a click on this icon you can have the **Name** and **Description** of the respective team to which you have been added as member displayed in the **Team properties** dialog. No changes can be made.

4 Communicating with Contacts

OpenScape UC Application simplifies the communication with your contacts. You can manage several communication devices to communicate with all the contacts from your contact list dialing one telephone number. You can create, edit, and delete access to your communication devices to initiate and receive voice communication messages. Configurable devices comprise your cell phone, home phone, office phone, and softphone (computer telephony feature).

An icon to the left of a contact entry indicates the contact's current state. When you hover the cursor over the icon, the status also appears as a tool tip.

4.1 One-Number Service

The *One-Number Service* feature enables the user to combine mobility, optimal availability and transparency towards third parties. Defining one *One-Number Service* for incoming and one for outgoing calls in the OpenScape UC Application.

Use the *One-Number Service* for outgoing calls to specify the preferred device to be used for outgoing calls initiated via your client. The callee always sees the specified number on his/her display.

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

NOTICE: In the **device display** of the main menu you can quickly select a device for making calls using the *One-Number Service*. In addition, you can invoke the **Forwarding** settings dialog there.

4.1.1 How to Configure the One-Number Service

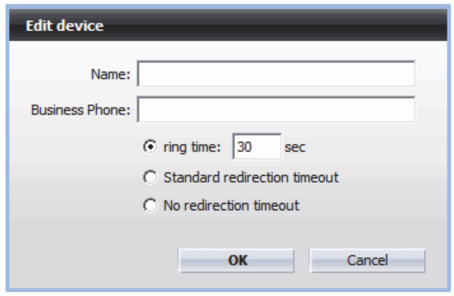
Using the *One-Number Service* feature requires the following settings:

Step by Step

1) In the main menu, click **menu > General ... > Common tab > Devices tab**.

2) Click the **New** button.

The following dialog opens.



3) Use this dialog to add devices, for example cell phone, voicemail number etc., for reaching you to your device list.

4) Click on the **Apply** button.

Your entries are saved. The dialog remains open and you can add more devices to your device list.

5) Switch to the **Forwarding** tab.

6) Click the corresponding combo box for the **Preferred device** feature to select your preferred device for the *one-number service* for **incoming** and **outgoing calls**.

> ***NOTICE:*** If you have added your voicemail box number to your device list for using the voicemail box as redirection target, do not configure this number as preferred device for the outbound *one-number service*. The reason is that you cannot make any calls from your voicemail box. The OpenScape UC Application server cannot recognize phone numbers you have added yourself as unsuitable for making calls.

7) Click the **Close** button.

The settings are saved and the settings dialog closes. Now you can use your *One-Number Service*.

4.2 Reaching a Contact by Phone, E-mail, or IM

The icons to the right of a contact's name in the **Contacts** window show you whether that person can be reached by phone, instant message or e-mail:

- , - The contact is available for a voice call.
- , - The contact is busy on one of his/her voice devices.
- , - No presence information available; it is thus impossible to specify whether or not the contact can be reached by phone. There can be several reasons for this. The user does not want to reveal his/her presence information, has rejected the presence subscription, has not allowed presence monitoring or is no OpenScape UC Application user. You can always revert to voicemail.

- , , - The contact can generally be reached by instant messaging. When the IM icon is missing, the contact is unavailable for instant messaging and no IM can be sent.
- The e-mail icon is always available if an e-mail address has been configured for the contact.

This information is also available in the form of a tool tip when you hover the cursor on the icon.

> ***NOTICE:*** The icon and tool tip display the overall availability for each media type (voice, e-mail, instant message) supported by any of the devices owned by a user. The general availability considers the state (busy, online, offline or unknown) of each device supporting the respective media type. These states are subsequently combined to determine the general availability.

To call a contact or send an e-mail or instant message to a contact from your contact list, click the appropriate icon next to the contact's name in the **Contacts** function window.

You can use the following options to call a subscriber not contained in your contact list:

- Via the **main menu**
  In the **main menu**, click the **<name or number>** entry field to enter the desired number by using your computer keyboard. Then click on or push the **return key**. The connection to the desired contact is established. The **Call Control** window opens automatically and shows the initiated connection as well as the operating elements for controlling this connection.
- Via the **Call Control** window
  Your can also open the **Call Control** window manually via **Pearl menu > View > Call Control**. Enter a phone number in the **New Call** combo box. Click on or push the **return key** to initiate the call.

> ***NOTICE:*** Click the icon in the **New call** combo box to view a list containing the last 20 phone numbers dialed. Select the desired number and click on .

4.3 Tell-Me-When

Sometimes it's hard to reach a specific contact. In this case you can make the *Tell-Me-When* feature of OpenScape UC Application perform actions or notify you as soon as the respective person is available again.

For example, if you want to call a contact but or is displayed next to his/her name in the contact list or his/her presence status differs from status **Available**, then you know that this contact is currently unavailable. In this case you can use the *Tell-Me-When* feature to be informed when the contact is available again. You can select one of the following notification types:

- A **notification pop-up** displayed, which informs you about the voice or presence availability modifications of the contact.
- A **return call** initiated. This is another attempt to set up a connection to the desired contact, triggered automatically.
- An **e-mail notification** sent to you. This e-mail informs you that the desired person is now available.

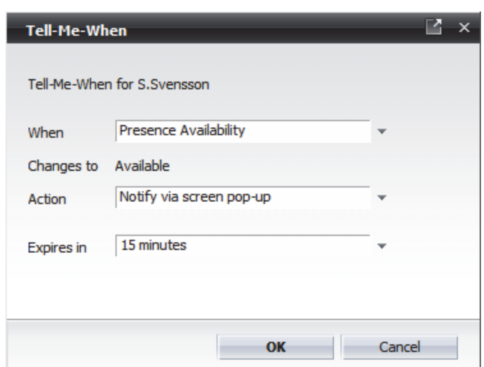
You can reach this notification feature via the **More functions** option in the toolbar of the **Contacts** function window.

> ***NOTICE:*** A list of the *Tell-Me-When* entries you have made can be viewed additionally via the **Pearl menu > Personal Settings > Tell-Me-When**.

4.3.1 Tell-Me-When Feature Settings

With a click on **More Options** and selecting the **Set Tell-Me-When ...** option you can configure the *Tell-Me-When* feature for a selected OpenScape UC Application contact and activate it subsequently.

Use the following dialog to customize the *Tell-Me-When* feature by performing the following settings.



- In the **When** combo box, define if you would like to monitor the voice availability or the presence status of the selected contact.
  - The telephone status of the selected contact is monitored via Voice Availability.
  - The presence status of the selected contact is monitored via Presence Availability.

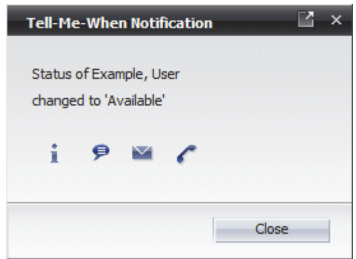
- You use the **Action** combo box to determine the action to be performed when the voice or presence availability changes. You also determine the type of notification to be used to inform you about these changes. The following options are provided in this combo box:
  - **Notify via screen pop-up**
    You are informed about changes to the voice or presence availability of a contact by a notification window.
  - **Place a call**
    A new connection is automatically set up to the desired contact.
  - **Notify via e-mail**
    You are notified about the person's availability by e-mail.
- Determine the desired timeout for the *Tell-Me-When* feature in the **Expires in** combo box. The following options are provided in this combo box:
  - **15 minutes**
  - **30 minutes**
  - **1 hour**
  - **4 hours**
  - **8 hours**
  - **Until event happens**
- Click the **OK** button to save the settings made and to close the dialog. The *Tell-Me-When* feature is thus activated for the selected contact.
  According to the current presence status of this person, one of the following presence icons is displayed in the **Contacts** function window.

Icon	Meaning
	The *Tell-Me-When* feature is active for a contact with status **Be right back**.
	The *Tell-Me-When* feature is active for a contact with status **Busy**.
	The *Tell-Me-When* feature is active for a contact with status **Do not disturb**.
	The *Tell-Me-When* feature is active for a contact with status **In meeting**.
	The *Tell-Me-When* feature is active for a contact with status **Available**. In this case, the voice availability of the contact is monitored.
	The *Tell-Me-When* feature is active for a contact with status **Not available**.

- Click the **Cancel** button to close the *Tell-Me-When* dialog without saving the settings made.

4.3.1.1 Features of the Tell-Me-When Notification Window

The notification window informs you about changes to the voice or presence availability of the selected contact.



In the **Tell-Me-When Notification** window you can trigger the following actions in addition:

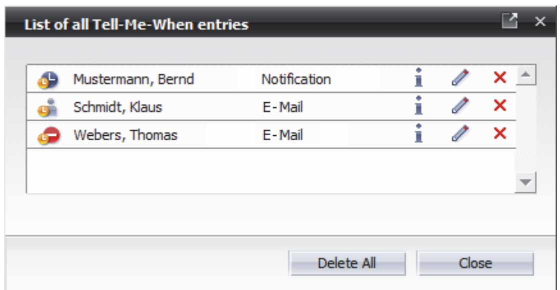
- Lookup Person
  A click on this icon opens the Lookup Person window, which contains information related to the selected contact.
- Start a chat with the displayed contact
  A click on this icon opens the Instant Messaging window. You can enter an instant message and sent it to the contact.
- Send an e-mail to the displayed contact
  A click on this icon opens the e-mail form of your default e-mail application for sending an e-mail to this contact.
- Call displayed contact
  Click on this icon to initiate a call to the displayed contact.

Click the **Close** button to close the *Tell-Me-When* notification window.

4.3.2 List of all Tell-Me-When Entries

The **List of all Tell-Me-When entries** provides an overview of all active *Tell-Me-When* features. You can access this dialog via the **Contacts** function window by clicking on **More features > Show all Tell-Me-When ...** in the toolbar.

> ***NOTICE:*** You can also access the **List of all Tell-Me-When entries** dialog via the **Pearl menu > Personal Settings > Tell-Me-When**.



A list entry contains the following elements (from left to right):

- A *Tell-Me-When* presence icon
- Contact Name
  If you place the mousepointer on the contact's name in the list of *Tell-Me-When* entries, the *Tell-Me-When* settings for this list entry are displayed as tooltip.
- Notification type or action to be performed when the voice or presence availability changes
  Possible are the following notification options and actions:
  - Notification pop-up
  - E-mail
  - Callback

For each list entry, the following features are available:

- Lookup Person
  A click on this icon opens the Lookup Person window, which contains information related to the selected contact.
- Show/modify *Tell-Me-When* entry
  A click on this icon opens the *Tell-Me-When* dialog, which lists the current settings of the selected active *Tell-Me-When* feature. You can also edit the settings there.
- Delete *Tell-Me-When* entry
  A click on this icon removes the associated *Tell-Me-When* entry from the list. Thus, the *Tell-Me-When* feature for this contact is also deactivated.

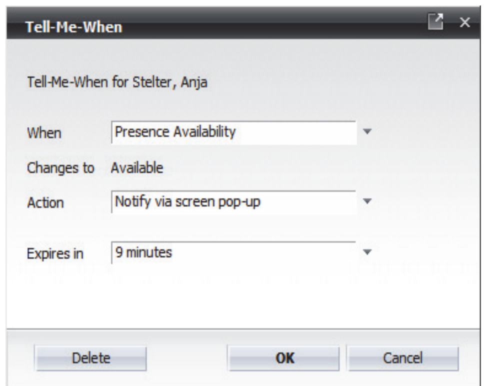
Furthermore, this dialog provides the following two buttons:

- **Delete All**
  A click on this button removes all *Tell-Me-When* entries from the list.

- **Close**
  A click on this button closes the **List of all Tell-Me-When entries** window.

4.3.3 Modifying Tell-Me-When Settings

You can modify the settings of an already activated *Tell-Me-When* feature during its runtime in the following dialog.



To reach this dialog, proceed as follows:

- Via the **Contacts** function window
  Click **More Options** and select the **Edit Tell-Me-When ...** option.

> ***NOTICE:*** The **Edit Tell-Me-When ...** option is displayed in the **More options** list only if you have selected the contact for whom you would like to modify the *Tell-Me-When* feature already set.

- Via the button of the corresponding *Tell-Me-When* list entry in the **List of all Tell-Me-When entries** dialog.

All settings that can be modified in this dialog are identical to the settings you can configure when activating the *Tell-Me-When* feature.

> ***NOTICE:*** If the *Tell-Me-When* feature has been set for the selected contact, the **Expires in** combo box displays additionally the remaining time.

Furthermore, you can use the **Delete** button to deactivate the *Tell-Me-When* feature for the selected contact.

5 Step-by-Step

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

5.1 General Information

This section informs you about how to start and end the program as well as how to log on.

5.1.1 How to Log on to the System

How to log on to the OpenScape UC Application system with the OpenScape Web Client:

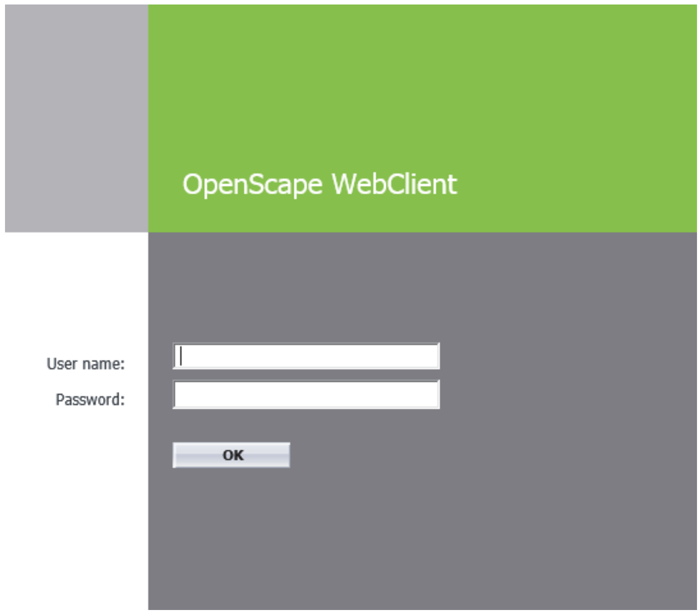
NOTICE: To authenticate the user the OpenScape Web Client places a cookie in the corresponding folders of your browser that must not be deleted. Therefore, make sure that the option to automatically delete cookies is not active when you shut the browser down. For example, the Microsoft Internet Explorer option **Cookies** under **Tools > Internet options > General > Browsing history > Delete browsing history on exit > Delete...** must not be active. Closing any browser window would otherwise disconnect you from the system and you would have to log on again. Do not delete the cookies manually either.

Step by Step

1) Start your preferred web browser.

2) Enter the system URL in the address input field and push the **return** key. The system administrator will inform you about the address.

The following login dialog opens:



3) Here you need to enter your **User name** for logging on to the OpenScape UC Application system.

4) If required, select your **Domain**.

> ***NOTICE:*** The combo box for selecting a domain is only available when several domains have been configured.

5) Here you need to enter your **Password** for logging on to the OpenScape UC Application system.

6) Then click on the **OK** button.

The OpenScape Web Client user interface opens.

5.1.2 How to Log out of the System

To log out of the OpenScape UC Application system proceed as follows:

Step by Step

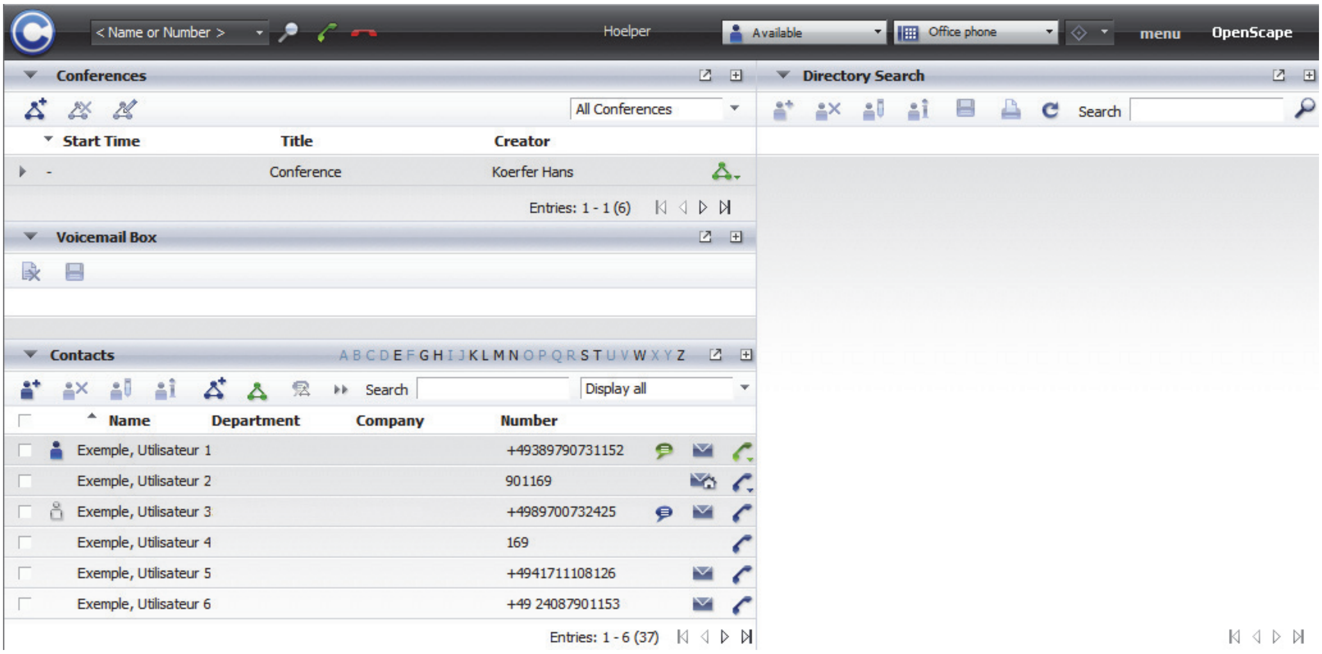
1) Click on **menu** in the main menu.

2) Select **Log off**.

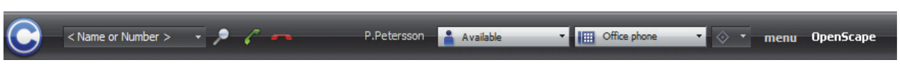
The OpenScape Web Client login dialog appears. You are logged out of the system.

5.2 Overview of the User Interface

After you have successfully logged in at the system, the advanced view of the OpenScape Web Client window opens by default. It features the following elements:



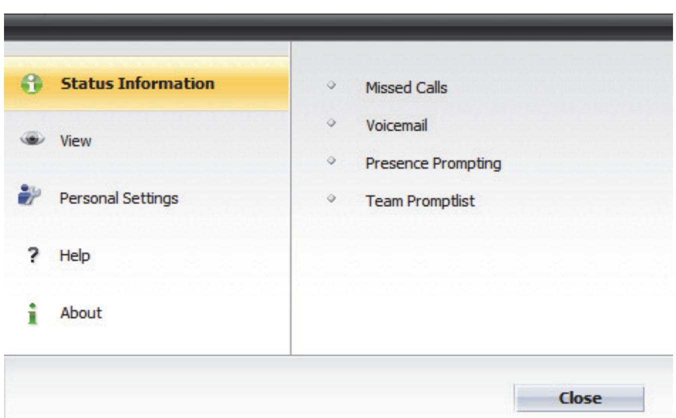
Main menu



You find the program's main menu at the top margin of the main window. It enables quick program operation.

Pearl menu

This is an application menu icon for accessing the basic OpenScape UC Application features.



Workspace

The workspace provides access to the features of the different function windows. You can customize it by deciding which of the following function windows to display in the workspace. You can configure up to five different workspace views in the main menu under **menu > Homepage** for this purpose. You can select the following function windows:

- **Call Control**
  The **Call Control** function window lets you look for and call a contact, shows information about in- and outbound calls and provides telephony features during an active call.
- **Journal**
  No matter whether you are logged on or off, the OpenScape UC Application server logs all inbound and outbound calls in the **Journal** function window. Furthermore, you can initiate connections to logged communication partners from the **Journal**.
- **Missed Calls**
  The **Missed Calls** function window enables fast access to all missed calls.
- **Voicemail Box**
  The **Voicemail Box** function window enables fast access to received voice-mails and provides controls for playing them.
- **Journal/Voicemail Box**
  This function window enables toggling the **Journal** (lists all calls) and the **Voicemail Box** (lists all received voicemails).
- **Conferences**
  The **Conferences** function window provides the controls for creating a new conference or for starting a configured conference. If you have a configured web conference connection, you can select whether this connection is to be started at a conference also.
- **Instant Messaging**
  The **Instant Messaging** function window enables sending and receiving instant messages. It also provides an overview of the active chat connections as well as the option to log off from/log on to the Instant-Messaging service.
- **Contacts/Contacts (compact)**
  The **Contacts** function window represents your private OpenScape UC Application contact list. You can add single contacts to this contact list manually or import such contacts from various directories and then group them in the list to suit your own requirements. You can also call single contacts directly, edit and remove existing contact data as well as send e-mails and instant messages from the contact list. Contrary to the **Contacts (compact)** window, the **Contacts** window includes a quick-search feature for contact entries (**Go to**).
- **Forward Call**
  The **Forward Call** function window enables diverting incoming calls from the office phone to other configured devices.
- **Directory Search/Directory Search (advanced)**
  The program supports integrating several directories. OpenScape UC Applicationcan search these directories for specific contacts and directly get in touch with them by e-mail or phone as well as integrate these contacts

in your private contact list. You can only look for the first or second name of a contact in the **Directory Search** function window. The advanced view of this function window provides further search criteria.

- **Bookmarks**
  The **Bookmarks** function window enables configuring new bookmarks or displaying internet pages via bookmarks already defined.
- **Team View**
  The **Team View** function window enables accessing the list of teams you have been added to as member and of those you may have created by yourself. It displays the member list of a selected team and provides useful features for telephoning in the team.

5.2.1 How to Configure your Workspace

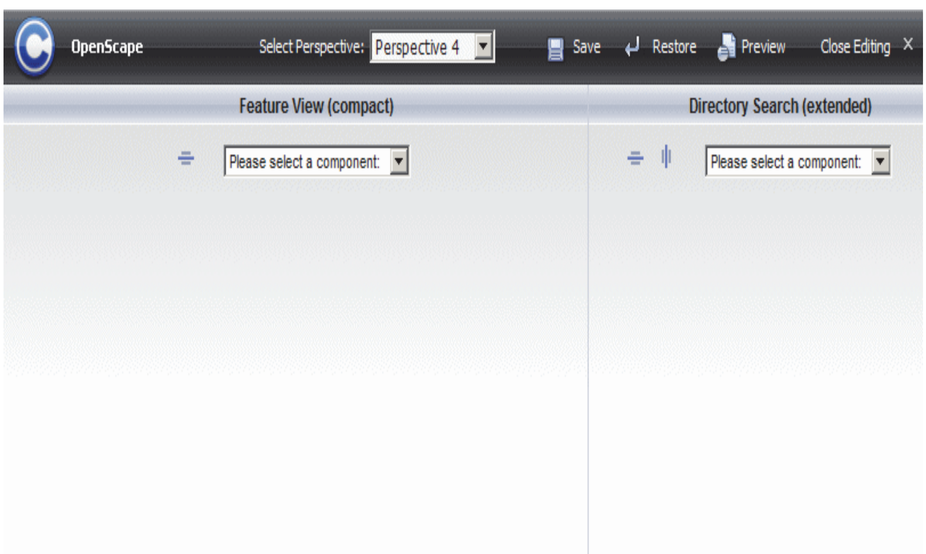
You can default various OpenScape Web Client views to react to different operating situations appropriately. All views can be displayed in the minimized or maximized representation.

How to configure a new view or edit an existing one:

Step by Step

1) Select the **Homepage** item from **menu** in the main menu.

The browser window switches to the advanced view of the setting page for views by default.



> ***NOTICE:*** In the basic state, i.e. without previous configuration, two frames are displayed next to each other (tile frames). You can define function windows for both of them.

2) Use the **Select Perspective** combo box in the main menu of this setting page to determine in which view the following settings are to be saved or invoked later on.

3) If required, supplement horizontally or vertically the number of displayed frames or reduce them.

4) In the **Please select a component** combo box select the desired feature for each frame you wish to integrate in the workspace.

5) Click on the **Preview** button to view the result of your interface configuration.

The previously configured interface is displayed in a separate window.

6) Close the preview window before you continue the workspace configuration.

7) Click on the **Save** button if you are satisfied with the interface.

The interface layout is saved under the configured perspective number and can be called by selecting this view.

8) Click on **Close Editing**.

The OpenScape Web Client workspace features the view you have configured.

5.3 Settings-related Actions

You can perform the following individual settings for each user:

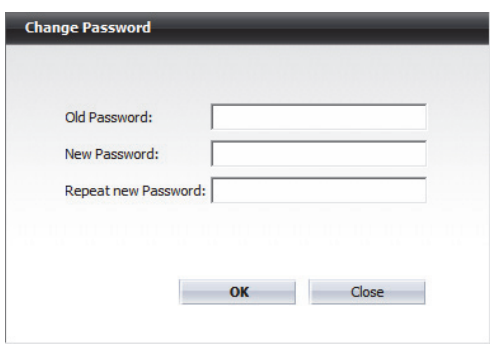
5.3.1 How to Change your Password

How to change your password for logging on to the OpenScape UC Application server:

Step by Step

1) Click **menu** in the main menu and select the **Change Password** menu option.

The following dialog opens:



2) Enter your current password in the **Old Password** input field.

3) Enter the new password in the **New Password** input field.

4) Confirm your new password and click on **OK**.

   The **Login Message** dialog opens. This dialog confirms the successful password alteration. Your modification now applies.

5) Select **menu > Log off** in the main menu.

   You are logged off of the OpenScape UC Application server. The OpenScape Web Client login dialog opens.

6) Log on to the system with your user name and new OpenScape UC Application password.

> ***NOTICE:*** Verify that the OpenScape UC Application password you have entered complies with the following requirements: It must comprise at least one special character, one digit and one capital letter as well as not more than three of the same character in succession.

> ***IMPORTANT:*** The OpenScape UC Application password must not be changed again within the next 24 hours after the last alteration.

5.3.2 How to Set your own Presence Status

How to set your current presence status:

Step by Step

1) Click in the main menu on the combo box of the **presence display**  or 

.

2) Select the desired presence status from the presence status list.

You presence status is integrated in the combo box of the **presence display** and shown in the contact lists of your OpenScape UC Application contacts.

5.3.3 Controlling the Presence Monitoring

You can use the features described in the following to allow or suppress the display of your presence status in the contact list of other users.

5.3.3.1 How to Allow Presence Monitoring

How to allow the display of your presence status in the contact list of other users:

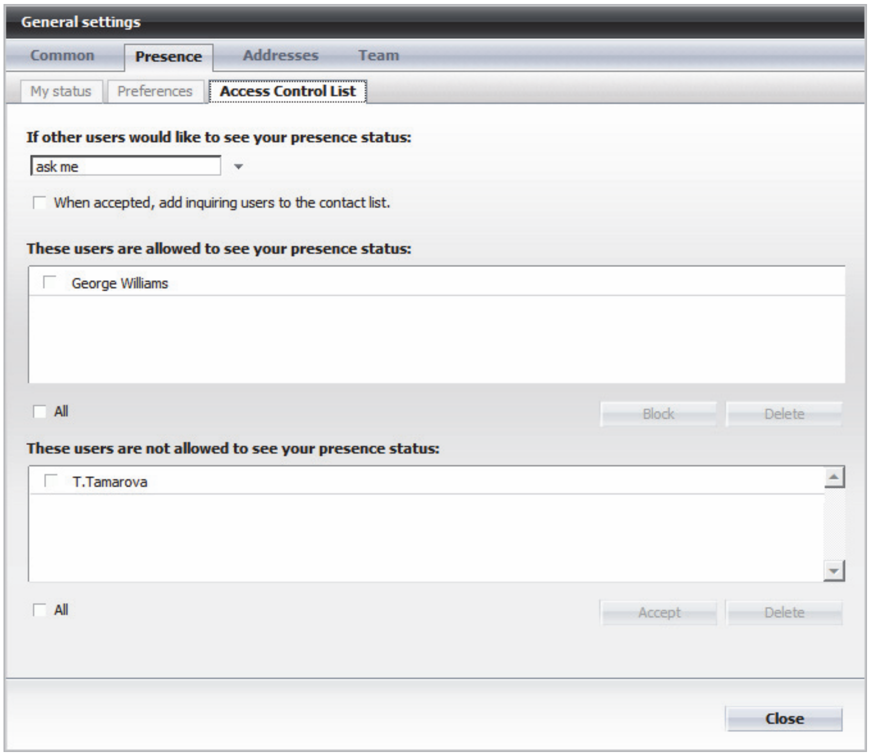
Step by Step

1) Click on **menu** in the main menu and select the **General** option.

The **General settings** dialog opens.

2) Switch to the tab **Presence > Access Control List**.

The following settings dialog opens.



3) On the **Access Control List** tab you find the **These users are not allowed to see your presence status** list. Select an entry in there.

4) Click on the **Accept** button.

The selected user is moved to the **These users are allowed to see your presence status** list.

The selected user may now see your presence status.

5.3.3.2 How to Block Presence Monitoring

How to block the display of your presence status in the contact list of other users:

Step by Step

1) Click on **menu** in the main menu and select the **General** option.

The **General settings** dialog opens.

2) Switch to the tab **Presence > Access Control List**.

3) On the **Access Control List** tab you find the **These users are allowed to see your presence status** list. Select an entry in there.
4) Click on the **Block** button.

   The selected user is moved to the **These users are not allowed to see your presence status** list.

Your presence information is not displayed to the selected user.

5.3.4 How to Set your Preferred Device

How to set your preferred device for inbound or outbound calls:

Step by Step

1) Click in the main menu on the combo box of the **device display**  or .
2) Select the desired device from the device list.

You can use the configured device for inbound and outbound calls from now on.

> ***IMPORTANT:*** The members of a Multi-Line Hunt Group (MLHG) must not configure a named device list as preferred device for incoming and/or outgoing calls.

> ***IMPORTANT:*** The members of a Multi-Line Hunt Group (MLHG) must not configure their voicemail box as preferred device for incoming and/or outgoing calls.

5.3.5 How to Define a new Device

If you wish to add a new device to your device list proceed as follows:

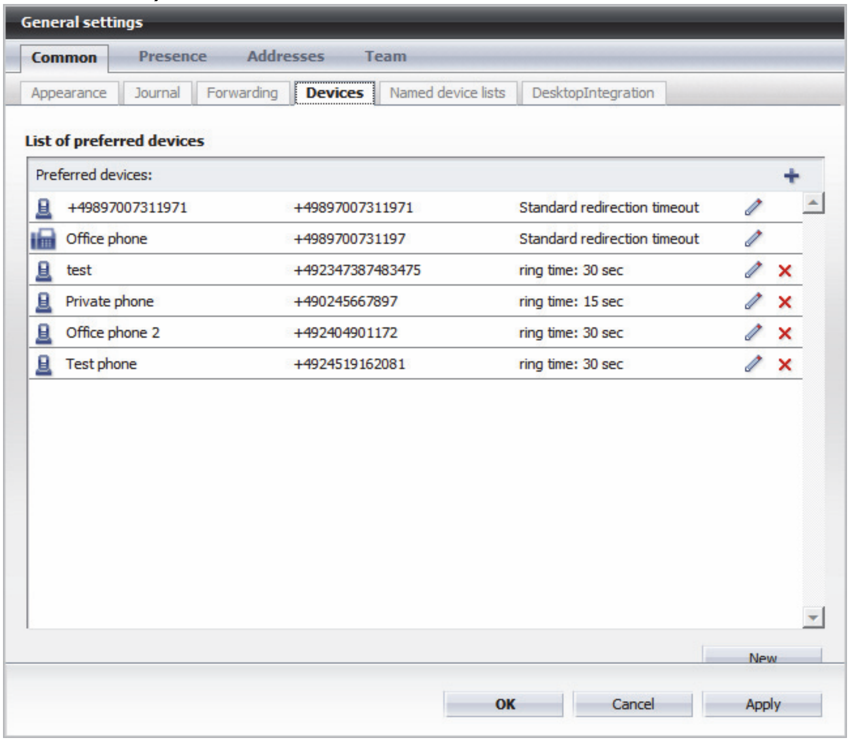
> ***NOTICE:*** Depending on your profile settings in the CMP you may not be authorized to add any new devices to your OpenScape UC Application device list. In this case you can only use your ONS number and already configured devices as preferred devices.

Step by Step

1) Click in the main menu on **menu** and select the **General** ... option.

   The **General settings** dialog opens.

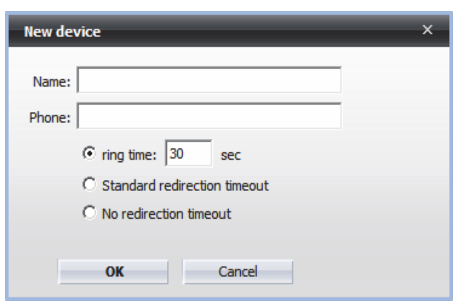
2) Switch to the tab **Common > Devices**.



3) Click on **New**.

> ***NOTICE:*** Depending on your profile settings as OpenScape UC Application user in the CMP, the + and **New** buttons for configuring a new, preferred device may be hidden. In this case you cannot add any number of your own devices to the OpenScape UC Application device list.

The following settings dialog opens.



4) Enter the desired **Name** and the **Phone** number.

5) Perform the settings for the **redirection timeout**.

> ***NOTICE:*** The **redirection time** is the ring time (sec.) after which the ring tone is automatically forwarded to the next configured device.

6) Click on **OK**.

   The **Devices** dialog closes and the newly created device appears in the device list.

7) Click on the **OK** button in the **General settings** dialog.

   The dialog closes and your entries are saved.

You can define the new device as your preferred one via the **device display**  or 

in the main menu.

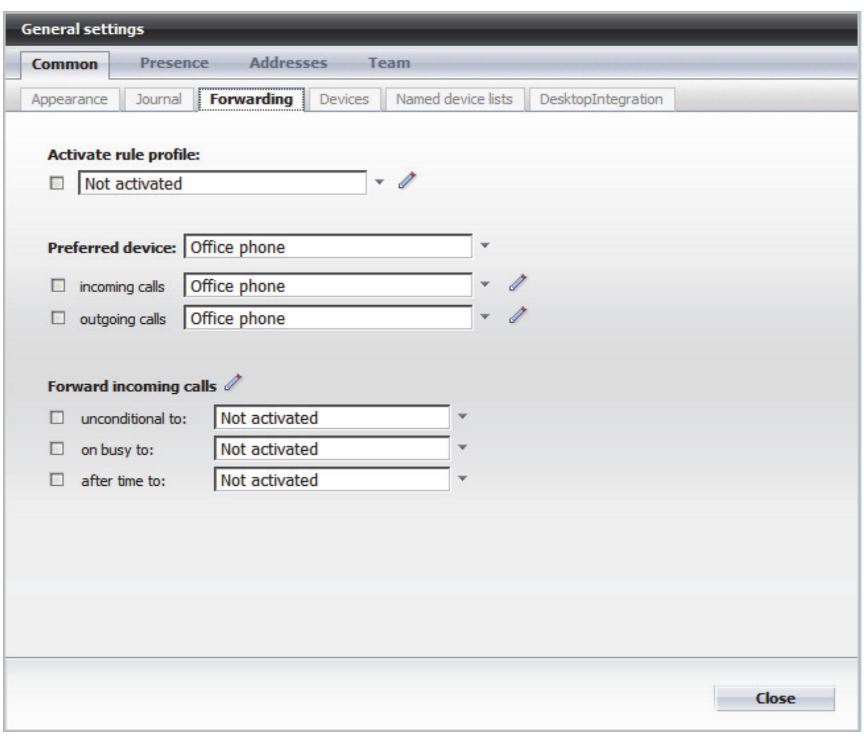
5.3.6 How to Configure/Activate a Call Forwarding

How to forward calls from your preferred device to another device from your device list:

Step by Step

1) Click in the main menu on **menu > General > Common tab > Forwarding tab**.

   The following settings dialog opens.



2) Depending on whether or not the calling person is to be informed about the call forwarding, continue with one of the following actions:

- Select the desired device from your device list via the **Preferred device** combo box. Your incoming calls are forwarded to the device you have just set. The forwarding is not displayed to the caller, i. e. he/she can only see your *One-Number Service*.
- Specify the desired device for the forwarding criterion (**unconditional to**, **on busy to**, **after time to**) under the **Forward incoming calls** option. Click on the corresponding combo box and select one of the devices already configured. Depending on the setting, your incoming calls are then always, only in case of a busy line or after you have not answered the phone for a specific time routed to the selected device. The caller then sees the address of the forwarding target.

3) Click the **Close** button.

Your settings are saved. The settings dialog closes.

The call forwarding has been configured and is active.

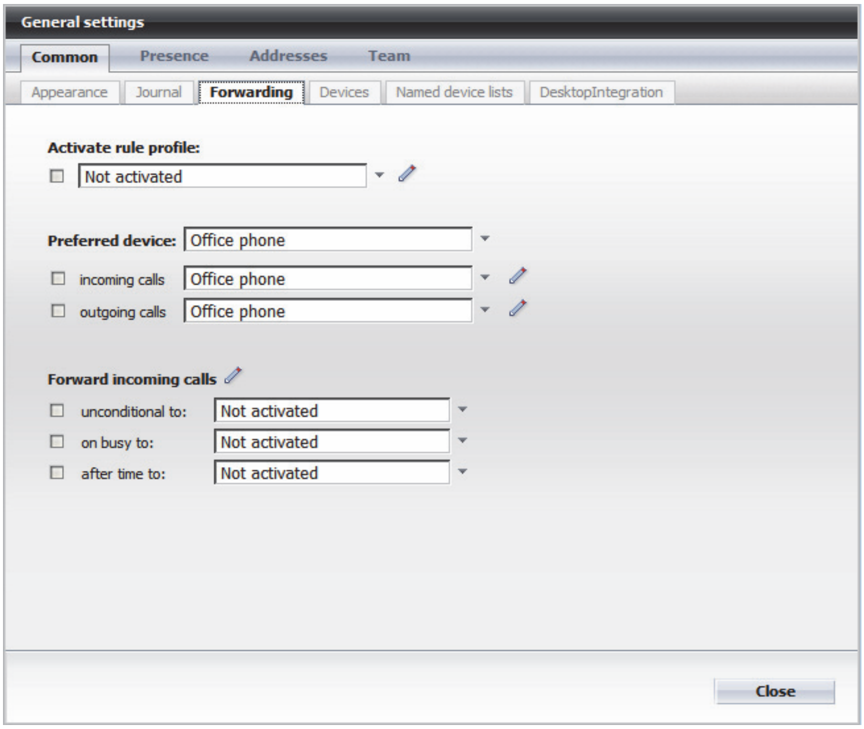
5.3.7 How to Disable a Call Forwarding

How to disable an active call forwarding:

Step by Step

1) Click in the main menu on **menu > General > Common tab > Forwarding tab**.

The following settings dialog opens.



2) Depending on the active forwarding option, select the **Not activated** option in the corresponding combo box for **Preferred device** or **Forward incoming calls**.

3) Click the **Close** button.

Your settings are saved. The settings dialog closes.

The performed settings become immediately active. Call forwarding is now disabled.

5.3.8 How to Set your mobile Time Zone

If you are on the road, for example, and in a different time zone, you can configure a mobile time zone. This makes the **Journal** display the arrival of calls in the current local time. Furthermore, your OpenScape UC Application contacts can see the **current time** of your location via the quick-info of your presence icon in your OpenScape UC Application contact list.

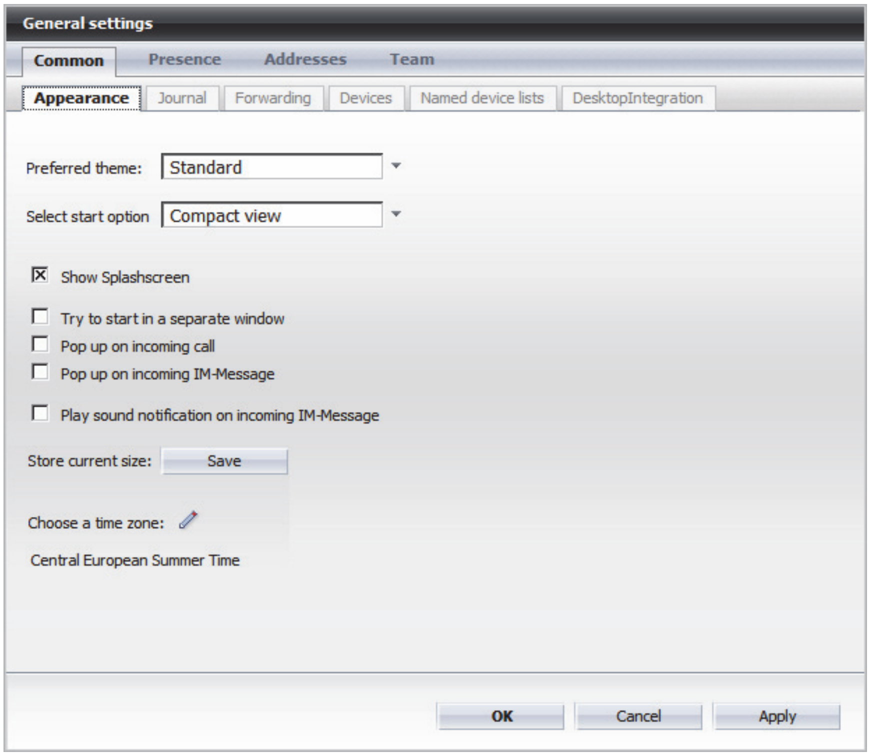
How to define your mobile time zone:

Step by Step

1) Start the program and log on to the system.

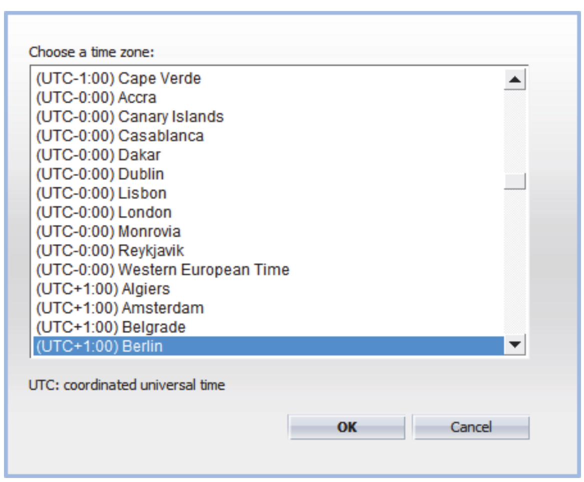
2) Select in the main menu **menu > General ... > Common tab > Appearance tab**.

The following dialog opens:



3) Click on ✎ to the right of **Choose a time zone**.

The following selection dialog opens:



4) Select your current location.

5) Confirm the performed settings with **OK**.

The selection dialog closes. The set time zone is displayed.

6) Click on **OK**.

The settings dialog closes. Your settings are saved.

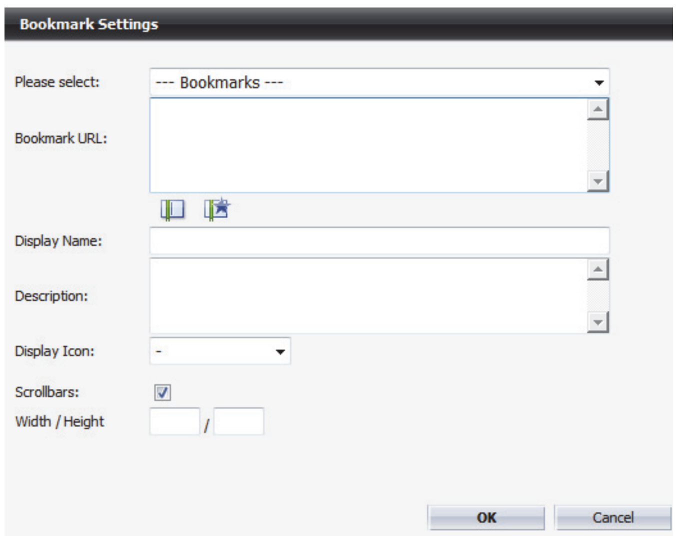
5.3.9 How to Create a new Bookmark

How to define a frequently visited internet page as bookmark:

Step by Step

1) On the **Bookmark** tab click on .

The following dialog opens:



2) Perform the bookmark settings.

NOTICE: To ensure that the selected internet page is displayed as your own tab, you must specify the complete URL inclusive `http://` or `https://`.

---

3) Click on **OK**.

Your settings are saved. The **Bookmark Settings** dialog closes.

5.4 Contact Management

The following features are available for managing the contacts in your contact list.

5.4.1 How to Create a new Contact

Prerequisites

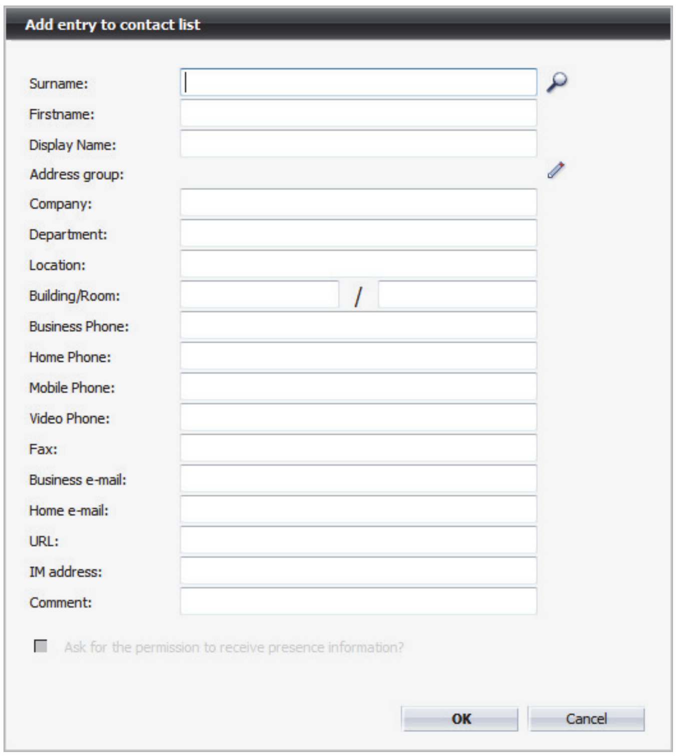
- The program is correctly configured and you are logged in at the communications system.

How to add a new contact to your contact list:

Step by Step

1) Click on in the **Contacts** function window.

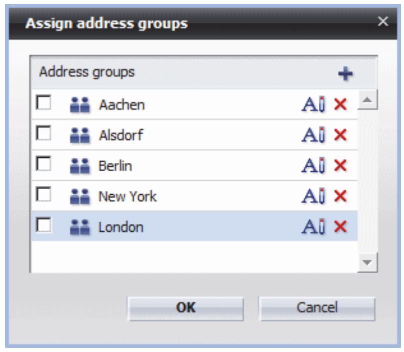
The following dialog opens.



2) Enter the contact data of the new contact in the appropriate fields.

3) Click on if you wish to assign an **Address group** to the contact.

The following dialog opens.



4) Set the check box of the desired address group.

If you have not yet defined an address group, a corresponding message is issued in the above dialog. Using the + icon you can spontaneously create a new group in this dialog.

5) Click on **OK** to confirm you entries.

The dialog closes.

Your entries are saved. The new contact entry appears in the contact list of the **Contacts** function window.

5.4.2 How to Add a Contact from a Directory

Prerequisites

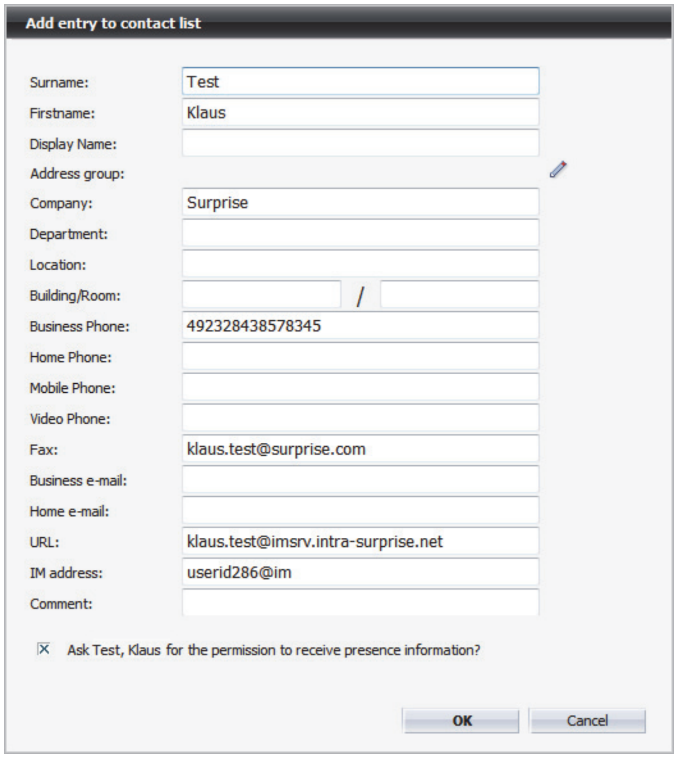
- The program is correctly configured and you are logged in at the communications system.

How to search a directory for a contact and add him/her to your contact list:

Step by Step

1) Click on in the **Contacts** function window.

The **Contacts** window opens.



2) Enter the person's **Surname** and/or **First name** in the respective fields.

3) Click on .

The dialog with the search results from different directories opens.

4) Click on the desired contact entry to select it.

5) Click on the **Add** button.

The dialog with the search hits closes. The available contact data has been copied to the **Contacts** dialog. If desired, you can complete the contact data here.

6) Click on **OK** to confirm your entries.

The dialog closes.

Your entries are saved and the new contact entry appears in the contact list.

5.4.3 How to Edit Contact Data

Prerequisites

- The program is correctly configured and you are logged in at the communications system.

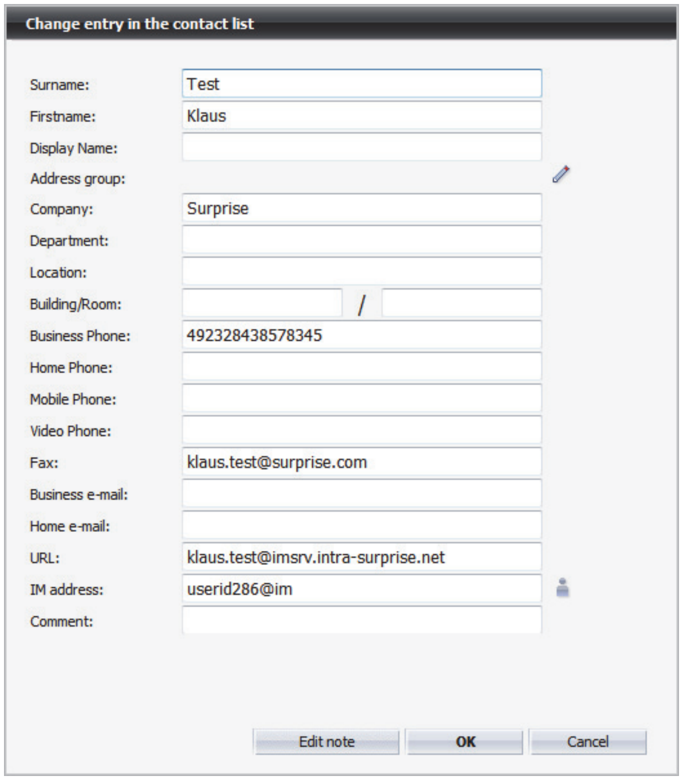
How to edit the contact information of an already configured contact:

Step by Step

1) Click on a contact's name to select him/her in the **Contacts** function window.

2) Click on .

The following (example) dialog opens with already available contact data.



3) Perform the desired changes in that dialog.

4) Click on **OK**.

Your modifications have become valid and the dialog closes.

5.4.4 How to Import Microsoft Outlook Contacts

How to import address data from your Microsoft Outlook contact list in your OpenScape UC Application contact list:

Step by Step

1) Select in the Microsoft Outlook menu bar **File > Import/Export...**.

The Microsoft Outlook wizard for importing or exporting files starts.

2) Choose in the selection field the **Export to a file** option.

3) Then click on the **Next** button.

4) In the **Create a file of type** field of the next dialog select the **Comma Separated Values (Windows)** option.

5) Confirm your selection with a click on **Next**.

6) In the **Select folder to export from** field of the next dialog select the **Contacts** folder.

7) Click on the **Next** button.

The **Export to a File** dialog opens.

8) Click on the **Browse...** button.

The file selection dialog **Browse** opens.

9) Select the storage location in this dialog and enter the name you wish to assign to the file to be created.

10) Click on **OK**.

The file selection dialog closes. The storage location is displayed in the **Save exported file as** field.

11) Click on **Next** and in the following dialog on **Finish**.

The export process begins. When the file export is complete, the Outlook Wizard closes automatically.

12) Click in your OpenScape UC Application client in the **main menu** on **menu > General ... > Addresses tab > Import tab**.

13) Click on the **Browse...** button for selecting the file to be imported.

14) Select in the **The address data was exported from** combo box the data source **MS Outlook** <**language**> from which the data to be imported is to be obtained.

15) Set one of the **Options** available for importing.

16) Click on the **Import** button to start the import process.

17) Confirm the displayed message with **OK**.

18) Click on the **Close** button.

The **General settings** dialog closes. Importing addresses is now complete and the imported contact data is displayed in the **Contacts** window.

5.4.5 How to Back up/Export a Contact List

Prerequisites

- The program has been configured correctly and completely.
- You are logged on to the communications system.

How to create a backup copy of your contact list:

Step by Step

1) Click in the main menu on **menu > General ... > Addresses** and select the **Export** tab.
2) Select the desired file format via the **The exported addresses will be imported again in** combo box.

> ***NOTICE:*** If you wish to export the address data as backup copy for reimporting it at a later date to restore your address list, select the **OpenScape Web Client** format.

3) Then click the **Export** button.

   The export process starts with the **File download** browser dialog opening for saving a file.
4) In the browser dialog click the **Save** button.

   The file selection dialog opens.
5) Select the directory in which the export file is to be saved and assign a name to the file.
6) In the file selection dialog click on **Save** to complete the export process.

You can access the export file in the specified folder in the selected format.

5.4.6 How to Import a Contact List

Prerequisites

- You have previously exported the contact list to be imported to a file of the format `*.csv` or `*.txt`.

How to integrate contact data from other address books in your OpenScape UC Application contact list:

Step by Step

1) Start the program and log on to the system.
2) Select in the main menu **menu > General ... > Addresses tab > Import tab**.
3) Click on the **Browse** button.

   The file selection dialog opens.
4) Select the file that you wish to import.
5) Specify in the **The address data was exported from** combo box the data source from which the data to be imported shall be obtained.
6) Set one of the following import options for the import:
   - **Replace duplicates with items imported**
   - **Allow duplicates to be created**

- **Do not import duplicate items**
- **Delete all items in list prior to importing data**

7) Click on the **Import** button to start the import process.

The system accepts the import job and queues it in its job list.

8) Click the **Close** button.

The **General settings** dialog closes.

Importing addresses is now complete and the imported contact data is displayed in the **Contacts** window.

5.4.7 How to Display the Presence Status of a Contact

> ***NOTICE:*** Controlling the presence display is only possible for OpenScape UC Application users. The presence feature is unavailable if the contact is no OpenScape UC Application user.

How to display presence information of another OpenScape UC Application user in your contact list:

Step by Step

1) Click in the **Contacts** function window on the name of the contact whose presence information is to be displayed.

2) Click on .

The **Change entry in the contact list** dialog opens with the already available contact data.

3) Set the **Show presence information** check box.

4) Click on **OK**.

The **Change entry in the contact list** dialog closes. The current presence status of the selected contact is displayed in the **Contacts** function window.

> ***NOTICE:*** If the contact has accepted your presence request, you can see his/her current presence status in your contact list. If the contact does not allow viewing his/her presence status, it is represented as **unavailable** in your contact list.

5.4.8 How to Edit a Presence Prompt

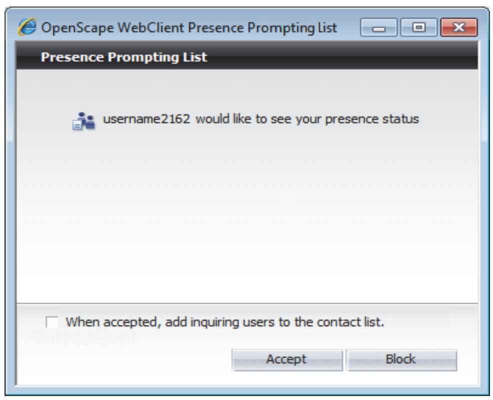
As soon as an OpenScape UC Application user has added you to his/her contact list by directory search, you receive a presence prompt as OpenScape UC Application user. In this dialog you can decide whether or not to allow the prompting user to see your presence information.

How to edit a presence prompt:

Step by Step

1) Click on **presence prompt list**.

The **Presence Prompting** dialog opens.



2) Set the **When accepted, add inquiring users to the contact list** option if required.

This copies the contact data of the prompting users automatically to your contact list when you accept the request.

3) Accept the request by clicking the **Accept** button or reject it by clicking **Block**.

The respective setting is configured in the system and the **Presence Prompting** dialog closes.

5.4.9 How to Create a new Address Group

Proceed as follows to define a new address group:

Step by Step

1) Click in the combo box of the **Contacts** function window. The **Display all** option is set in this combo box by default.

The list of already existing address groups is displayed.

2) Select here the **Edit** feature.

The **General settings** dialog opens. You can already see the **Address groups** tab.

3) Click on the **New group** button.

The **Address groups** list features a new entry named **new address group**.

4) Click on the defaulted name **new address group**.

The name of the address group is represented as input field.

5) Enter an expressive name for the new address group.

6) Click on the **Apply** button.

The new name has been copied for the newly configured address group.

7) Click on **OK**.

The address group is saved and the **General settings** dialog closed.

Specifying the address group is thus accomplished. You can now select this group under the entered name in the combo box of the **Contacts** dialog.

5.4.10 How to Delete an Address Group

Proceed as follows to delete an address group:

Step by Step

1) Click in the combo box of the **Contacts** dialog.

The list of already existing address groups is displayed.

2) Select here the **Edit** feature.

The **General settings** dialog opens. You can already see the **Address groups** tab.

3) Select the address group that you want to delete.

4) Click on ×. The address group will be removed from the list.

5) Click on **OK**.

Your modification is saved and the **General settings** dialog closed.

5.4.11 How to Filter your Contact List by Address Group

How to display the contacts of an existing address group in the contact list:

Step by Step

1) Click in the combo box of the **Contacts** dialog.

The list of already existing address groups is displayed.

2) Select the desired address group.

The address group is displayed in the combo box and the associated contacts appear in the **Contacts** dialog.

5.4.12 How to Rename an Address Group

Proceed as follows to rename an address group:

Step by Step

1) Click in the combo box of the **Contacts** dialog.

The list of already existing address groups is displayed.

2) Select here the **Edit** feature.

The **General settings** dialog opens. You can already see the **Address groups** tab.

3) Select the address group that you want to rename.

4) Click on the address group name or on .

The cursor appears in the name entry.

5) Change the address group name.

6) Push the **return key**.

The changed name is itemized in the list of configured address groups.

7) Click on **OK**.

Your modification is saved and the **General settings** dialog closed.

> ***NOTICE:*** When you complete the renaming with **OK**, the address group will be modified in all data records that access it.

5.4.13 How to Assign an Address Group to a Contact

Proceed as follows to assign an address group to a contact:

Step by Step

1) Open the **Contacts** function window.

2) Click on the name of the contact who you wish to assign to a previously defined address group to select him/her.

3) Click on .

The **Change entry in the contact list** dialog opens with the already available contact data.

4) Click on .

The **Assign address groups** dialog opens.

5) Set the check box of the desired address group.

6) Then click on **OK**.

The **Assign address groups** dialog closes. Your settings are applied.

7) Click on **OK** in the **Change entry in the contact list** dialog.

Your settings are saved and the dialog closes.

5.5 Communicating with your Contacts

The following features are available for communicating with other subscribers:

5.5.1 How to Call a Contact

Prerequisites

- The program has been configured correctly.
- You are logged on to the communications system.

To call a contact from your contact list proceed as follows:

Step by Step

› Click in the **Contacts** function window on in the row of the desired contact entry.

NOTICE: If more than one number is specified for the contact, click on to select the desired one.

IMPORTANT: If the device you have set as the preferred one is not your office phone, the PBX will first set up a connection to this configured device. After your call has been accepted on this device, the connection to the other subscriber is set up.

The connection is established and displayed in the **Call Control** function window.

5.5.2 How to Dial a Phone Number

Prerequisites

- The program has been configured correctly.
- You are logged on to the program.

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

Step by Step

1) Enter the desired phone number in the **<name or number>** field of the main menu.

2) Click on in the main menu.

The call is initiated and listed in the **Call Control** frame.

> ***IMPORTANT:*** If you use the *ONS* number assigned to you in the CMP by your system administrator as preferred device and the *auto-answer* feature is active in the PBX for this number, the desired conversational partner is directly connected. In contrast, if you have set for example your mobile phone as preferred device, a connection from the PBX to your preferred device is set up first. You need to accept this call before the connection to the conversational partner can be established.

5.5.3 How to Dial a Phone Number Using Copy & Paste

You can use the copy & paste method to set up a connection to a phone number that you have entered in another application (for example a word processing program):

Step by Step

1) Select the phone number in the application (for example in a word processing program) and copy it to the clipboard with **[Ctrl] + [C]** or with the features provided by the application.

2) Paste the phone number with one of the following hotkeys from the clipboard into the **<Name or Number>** combo box in your client's main menu:

   a) **Shift key + [Ins]** without office code

   b) **[Ctrl] + [V]** without office code

3) Click on in the main menu.

The connection is immediately set up and displayed in the **Call Control** function window.

5.5.4 How to Accept a Call

Prerequisites

- The program has been configured correctly and completely.
- You are logged on to the communications system.

To accept an icoming call displayed in the **Call Control** function window proceed as follows:

Step by Step

› Click on in the **Call Control** function window.

> ***IMPORTANT:*** If you do not have set your office phone as preferred device but another one, the icon is not available in the **Call Control** function window. In this case you can accept the call only on the configured device but not via the **Call Control** function window.

You are connected to your conversation partner. The **Call Control** function window shows call control features.

5.5.5 How to Transfer an incoming/active Call to a Subscriber

This action transfers the control of an incoming or accepted call to another subscriber. Proceed as follows:

Step by Step

1) Click on in the area of the displayed call in the open **Call Control** window.

The **Redirecting Call** dialog opens.

2) Enter the phone number of the desired subscriber in the input field of this dialog.

3) Select the **Handover to** option.

The caller is connected to the new subscriber. Your connection is automatically closed. The **Call Control** function window closes.

5.5.6 How to Change your Preferred Device during an Active Call

This action allows you to stay in control of the call.

Step by Step

1) Click on in the area of the displayed call in the open **Call Control** window.

The **Redirecting Call** dialog opens.

2) Select the **Transfer to** option.

3) Select the desired device in the displayed device list.

The call has been transferred to the new device and must be continued at this device.

5.5.7 How to Make a Consultation Call

If you are in an active call and wish to call another subscriber for consulting him/her, proceed as follows:

Step by Step

1) In the **Call Control** function window, enter the phone number of the subscriber you wish to consult in the **New Call** input field.

2) Click on to the right of the **New Call** field to initiate the call.

The connection to the first conversational partner is automatically being held and he/she hears music(-on-hold). You can now talk to the consultation-call subscriber.

5.5.8 How to Toggle

Prerequisites

- The program has been configured correctly and completely.
- You are logged on to the communications system.
- You are being connected to two conversational partners. One of these calls has been set to on-hold because you are conducting a consultation call.

How to toggle calls during a consultation:

Step by Step

› Click in the **Call Control** function window on **Toggle** in the area of the held call.

The held call becomes active again and you can talk to the original subscriber. The connection to the consultation-call subscriber is being held.

5.5.9 How to Transfer a Call to a new Subscriber

Prerequisites

- You are conducting a consultation call.

How to connect the original caller to the consultation call subscriber during a consultation call:

Step by Step

› In the **Call Control** function window click on in the area of the held call.

Your connection is automatically closed. The other two subscribers can talk to each other.

5.5.10 How to Terminate a Call

How to clear a connection listed in the **Call Control** function window:

Step by Step

› Click in the **Call Control** function window on in the area of the active call.

The connection is cleared and does no longer appear in the **Call Control** function window.

5.5.11 How to Display missed Calls

How to display a list of all missed calls:

Step by Step

› Click on **Missed Calls** in the tab bar under the main menu.

The **Missed Calls** tab opens in the workspace. This tab lists all missed calls .

5.5.12 How to Sort Journal Entries by Call Type

How to display only specific call types in the journal:

Step by Step

› In the combo box at the top right margin of the **Journal** function window select the call type you wish to have displayed in the **Journal**:

- **All Calls** (default)
- **Missed Calls**
- **incoming calls**
- **outgoing calls**

The **Journal** function window lists only the calls of the selected call type.

5.5.13 How to Start a Chat (Instant Messaging)

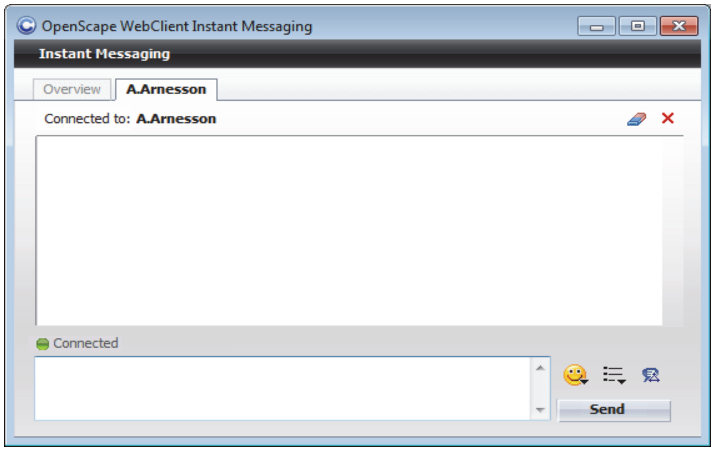
How to start a chat with another OpenScape UC Application user:

Step by Step

1) Open the **Contacts** function window.

2) Click on or in the row of the desired contact.

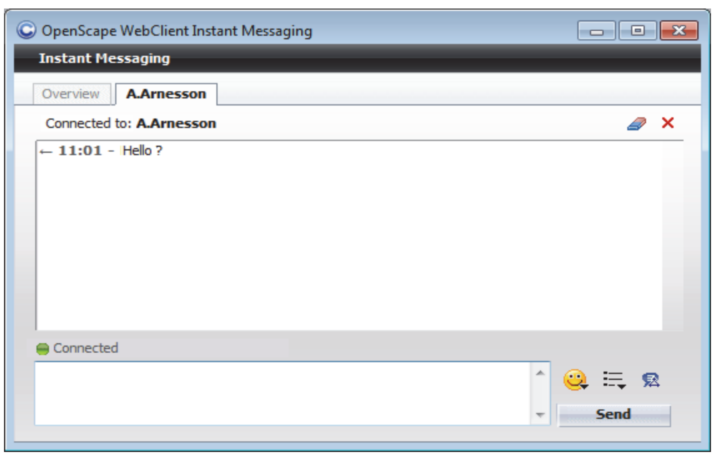
The **Instant Messaging** window opens.



3) Enter the instant message you wish to send to the chat partner in the bottom entry area of the chat window.

4) Click on the **Send** button.

The message appears in the top text area, which also shows the further communication.



Depending on the IM mode of the chat partner - *Available* or *Unknown* - the instant message is delivered:

- Directly after it was sent, if the Chat partner is logged on to the OpenScape UC Application system and/or at the IM service
- Not at all, because the chat partner has logged out of the OpenScape UC Application system and/or off of the IM service.

5.5.14 How to Send an E-Mail to a Contact

Prerequisites

- An e-mail address has been configured for the contact under the contact information.

To send an e-mail to a contact proceed as follows:

Step by Step

1) Click on in the **Contacts** function window in the row of the desired contact.

Your preconfigured default e-mail application starts.

2) Write and send the e-mail message as usual.

The window of the e-mail application closes. The e-mail was sent.

5.5.15 How to Play Voicemails via Telephone

Execute the following steps to play your voicemails via telephone:

Step by Step

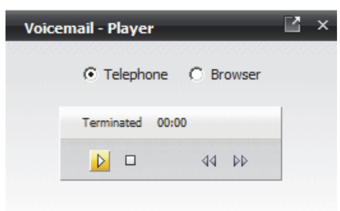
1) Open the **Voicemail Box** function window.

You find a list of all played voicemails and of those that have not been played yet .

2) Activate the check box preceding the entry of the voicemail you would like to play.

3) Click on the icon.

The **Voicemail-Player** window with the set **Telephone** option opens.



4) Pick up the receiver.

The voicemail playback starts immediately.

5.5.16 How to Play Voicemails via the Windows Media Player

Execute the following steps to play your voicemails via the *Windows Media Player*:

Step by Step

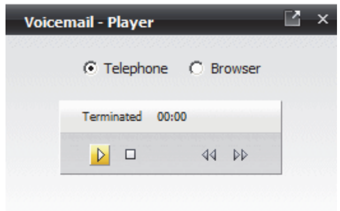
1) Open the **Voicemail Box** function window.

You find a list of all played voicemails and of those that have not been played yet .

2) Activate the check box preceding the entry of the voicemail you would like to play.

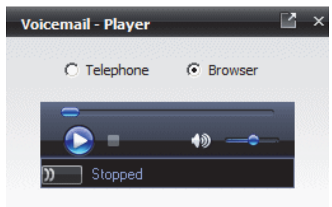
3) Click on the icon.

   The **Voicemail-Player** window with the set **Telephone** option opens.



4) Select the **Browser** option.

   The view of the **Voicemail-Player** window changes as follows:



   After a short initialization period (connection is being set up), "Ready" is displayed under the controls.

5) Click on .

The voicemail playback starts.

5.5.17 How to Activate Tell-Me-When

How to configure and activate the *Tell-Me-When* feature for one of your OpenScape UC Application contacts:

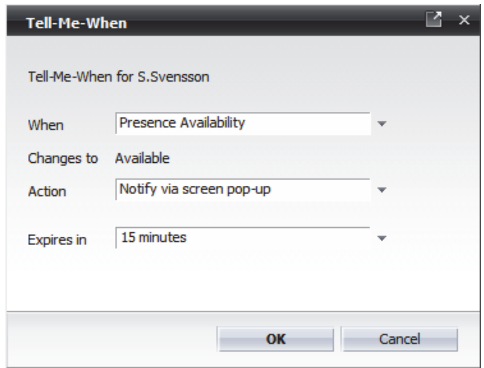
Step by Step

1) Open the **Contacts** function window with a click on the corresponding tab in the tab bar under the main menu.

2) Select the contact entry for which you wish to activate the *Tell-Me-When* feature.

3) Click in the **Contacts** function window in the toolbar on and select **Set Tell-Me-When ...** .

The following dialog opens.



4) Set the desired option in the **When ... Changes to** combo box.

5) Select the desired option in the **Action** combo box.

6) Determine the desired timeout for the *Tell-Me-When* feature in the **Expires** combo box.

7) Click on **OK**.

The **Tell-Me-When** dialog closes.

The *Tell-Me-When* feature is no longer active for the selected contact. A special icon to the left of the contact name in the contact list indicates this.

5.5.18 How to Deactivate Tell-Me-When

How to deactivate the Tell-Me-When feature for a selected contact:

Step by Step

1) Click in the toolbar of the **Contacts** function window on **More functions**.

2) Select **Delete Tell-Me-When**.

The Tell-Me-When feature is no longer active for the selected contact.

5.6 Collaborating with Contacts

This software solution provides the conference and team feature for collaborating with other subscribers. The following sections will assist you in using these two features.

5.6.1 How to Create a new Team

In this section we describe how you create a new team.

Prerequisites

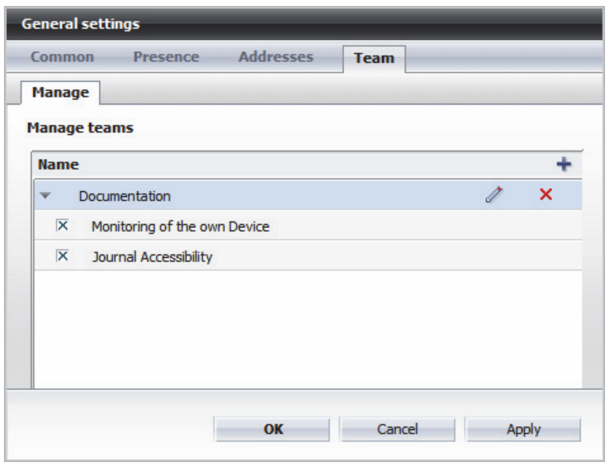
- You have team administrator privileges, i.e. the system administrator has assigned you the default **Team Administrator** profile or another profile with the privilege of **managing groups** in the CMP.

To create a new team proceed as follows:

Step by Step

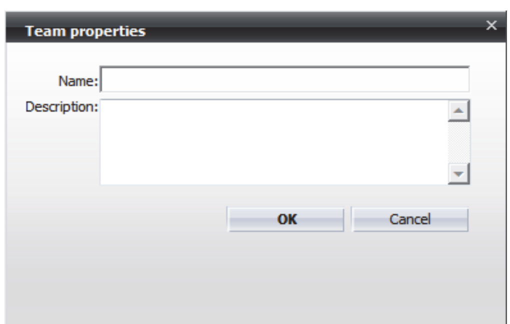
1) Click on in the **Team View** window.

The **General settings** dialog opens and shows the settings on the **Manage > teams** tab.



2) Click on .

The **Team properties** dialog opens.



3) Enter the desired team name in the **Name** input field.

4) Enter optionally a descriptive text for the team in the **Description** input field.

5) Click on **OK**.

The **Team properties** dialog closes. The new team is created and appears in the list of your teams on the **Manage > teams** tab.

6) Click on **OK** in the **General settings** dialog.

The **General settings** dialog closes. You can select the new team from the **Select team** combo box in the **Team View**.

5.6.2 How to Assign a new Member to a Team

In this section we describe how you can integrate a new member in your team.

Prerequisites

- You have team administrator privileges.

To add a new member to a team you created by yourself proceed as follows:

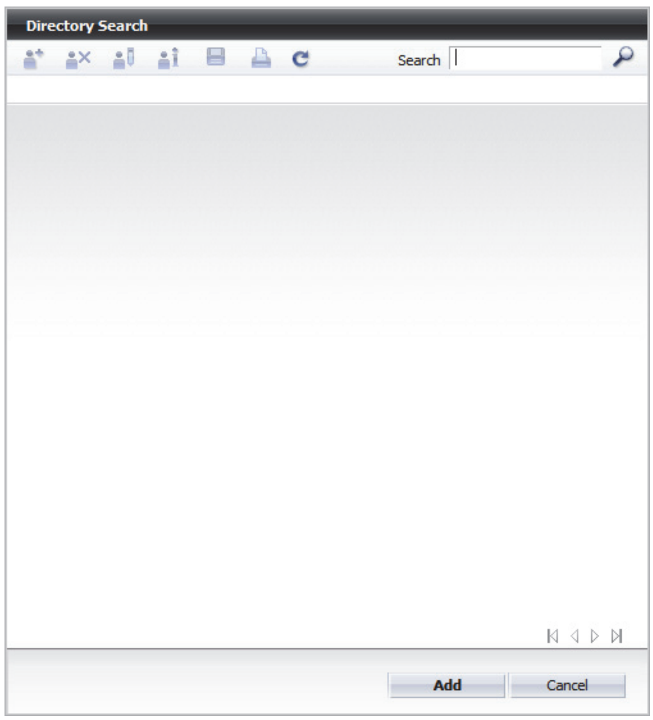
Step by Step

1) Select **Team View** on the tab bar.

The **Team View** function is displayed in the workspace.

2) Click on .

The **Directory Search** dialog opens.



3) Enter the name of the desired contact in the **Search** input field.

4) Click on .

The search hits are listed in the **Directory Search** dialog.

5) Click on the desired contact entry to select it.

6) Then click on **Add**.

The **Directory Search** dialog closes. The new team member has been integrated in the list of team members and is displayed in the **Team View** function window.

> ***NOTICE:*** The privileges **Monitoring of the own Device** and **Journal Accessibility** are not automatically granted with integration in the team. The team member decides for himself/herself which privileges to grant to the other team partners.

5.6.3 How to Start a Ad-hoc Conference

> ***NOTICE:*** Ad-hoc conferences support audio connections only.

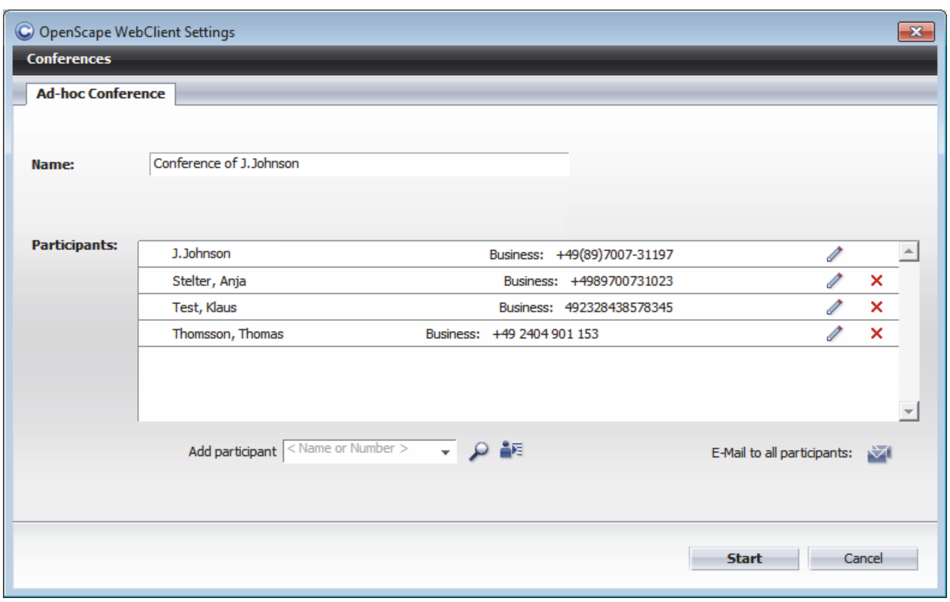
How to start an Ad-hoc conference with selected participants:

Step by Step

1) Select the contacts to hold a conference with in the **Contacts** window.

2) Then click on .

A settings dialog opens.



3) Assign a **Name** to the conference and change the defined participant entries if desired ( ).

4) Click on the **Start** button.

The **Call Control** function window opens. All participants are connected after they have lifted the receiver. The spontaneously started conference is also listed in the **Conferences** window and indicated by or .

5.6.4 How Add a Participant to an Active Conference

If you would like to add another participant to a conference, proceed as follows:

Step by Step

1) Click in the **Call Control** window on to search the configured directories for the desired contact.

The **Directory Search (advanced**) window opens.

2) Enter the name to be searched for.

3) Click on the **Search** button.

4) Select the desired entry among the search hits and confirm your selection with **OK**.

5) Click on in the **Call Control** function window.

The new participant is called by the system. He/she is connected to the conference after he/she has picked up the receiver.

5.6.5 How to Configure a Meet Me Conference

To configure a new Meet Me conference proceed as follows:

Step by Step

1) Open the **Contacts** function window.

2) Select the conference participants from your contact list. You can select several contacts at a time by clicking on the desired contact list entries with the **[Ctrl]** key kept pressed.

3) Then click on .

The settings dialog in which you can configure the new conference with the selected participants opens.

4) Enter the desired conference name in the **Name** input field.

5) Determine the desired **Option**s for the conference.

6) If desired, add further participants via the or icon.

7) Click on the **Apply** button to save your settings without closing the settings dialog.

The **Bridge number** field is filled in automatically and the conference **PIN** is generated. Subsequently, you can perform further configuration changes. The conference name appears as entry in the **Conferences** window.

8) Click on **OK** to save modifications and to close the dialog.

The new conference is listed in the **Conferences** window and can be started from there.

5.6.6 How to Configure a Scheduled Meet Me Conference

To configure a scheduled Meet Me conference proceed as follows:

Step by Step

1) Open the **Contacts** function window.

2) Select the conference participants from your contact list. You can select several contacts at a time by clicking on the desired contact list entries with the **[Ctrl]** key kept pressed.

3) Then click on .

The settings dialog in which you can configure the new conference with the selected participants opens.

4) Enter the desired conference name in the **Name** input field.

5) Activate the **Start time** check box.

The input field for setting date and time as well as for determining the conference duration is displayed.

6) Click on .

The calendar dialog opens.

7) Set the desired date and time at which the conference shall start automatically.

8) Confirm your selection with **OK**.

The calendar dialog closes.

9) Define the conference **Duration**.

10) If desired, add further participants via the or icon.

11) Determine the desired **Option**s for the conference.

12) Click on the **Apply** button to save your settings without closing the settings dialog.

The **Bridge number** field is filled in automatically and the conference **PIN** is generated. Subsequently, you can perform further configuration changes. The conference name appears as entry in the **Conferences** window.

13) Click on **OK** to save modifications and to close the dialog.

The scheduled conference appears in the **Conferences** window. The time at which the system automatically starts the conference appears under **Start time**.

5.6.7 How to Join an Active Meet Me Conference

You must be a conference participant before you can join a conference already in progress.

Step by Step

1) In the **Conferences** window click on to the left of the name of the active conference you wish to join.

   A selection list appears.

2) Select the **Join Conference** option in the open selection list.

You are connected to the conference.

5.6.8 How to Initiate a MeetNow! Conference

Prerequisites

- All conference participants have been informed by e-mail or phone about the service access number, the conference start time and the defaulted conference PIN.

How to perform a MeetNow! conference:

Step by Step

1) Dial into the conference via the service access number for MeetNow! conferences at the agreed time.
2) Enter the agreed conference PIN via phone keypad or computer keyboard.
3) Conclude the PIN entry with the # key.

   You are directly connected to the MeetNow! conference.

5.6.9 How to Display Conference Data

How to display the conference data of a conference itemized in the conference list:

Step by Step

1) Select the desired conference in the **Conferences** window.
2) The click on to the left of the conference name.

The conference data is displayed under the selected list entry.

5.6.10 How to Edit Conference Settings

How to change an already defined conference, for example to add a participant:

Step by Step

1) Select the relevant conference in the conference list in the **Conferences** window.
2) Click on .

   The settings dialog opens with the data of the already defined conference.
3) Modify the data as desired.
4) Click on **OK**.

Your modifications are saved. The settings dialog closes.

5.6.11 How to Start an Ad-hoc Web Conference

Proceed as follows to start a web conference with other contacts spontaneously:

Step by Step

1) Select the contacts to hold a conference with in the **Contacts** window.
2) Then click on .

   A settings dialog opens.
3) Assign a **Name** to the conference and change the defined participant entries if desired ( ).

   This settings dialog lets you add further members to the Ad-hoc conference. Enter a participant name or a phone number in the **Add participant** combo box for this purpose. Then click on to search the configured directories for the contact or on to complete the required contact information via the **Add participant** dialog.
4) Click on the **Start** button to initiate the Ad-hoc conference.

   The **Call Control** window opens. All participants are connected after they have lifted the receiver. The spontaneously started conference is also listed in the **Conferences** window and indicated by or .
5) Click on in the **Call Control** function window.

   A file download dialog opens. In there you must download the program required for the web conference.
6) Click on the **Apply** button in this dialog.

   After the successful download a security warning is displayed.
7) Confirm this security prompt with a click on the **Apply** button.

The connection to the web conference server is set up.

5.6.12 How to Extend a Call to an Ad-hoc Web Conference and Invite further Participants

In this section you learn how to extend a call to a server-based Ad-hoc web conference with two participants and the option of adding further participants.

Execute the following steps to extend a call to an Ad-hoc web conference and to invite further participants:

Step by Step

1) Click on in the **Call Control** window's section that displays the active call.

A file download dialog opens. In there you need to download the program required for the web conference.

At the same time, a conference invitation is sent to your conversational partner's e-mail address. The invitation contains a user-specific internet address for downloading the OpenScape Web Collaboration client module.

If your conversational partner is not available as contact in your contact list, a dialog opens in which you can enter the e-mail address to which the conference invitation shall be sent. In this dialog you can also determine whether the participant shall be automatically entered as contact in the contact list.

This dialog is displayed even if no e-mail address has been specified for the contact from the contact list.

> ***NOTICE:*** The icon for requesting a web conference is also displayed with active calls that, for logical reasons, are not extended to a web conference such as connections to a mailbox (for example OpenScape Voice Portal) or to an automatic telephone exchange (for example OpenScape Auto Attendant). Consequently, this icon has no function in such cases.

2) Click on the **Apply** button in this dialog.

The successful download is followed by a security warning.

3) Confirm this security prompt with a click on the **Apply** button.

The connection to the web conference server is set up.

4) If you wish to invite further participants for an existing conference retrospectively, click in the **Call Control** window on the envelope icon for the conference invitation.

A new e-mail is opened in your e-mail client. This e-mail contains all information an invited person requires for connecting to the conference.

5) Send the e-mail to all participants you wish to invite for the existing conference retrospectively.

5.6.13 How to Start an Meet Me Web Conference

How to start a web conference selected in the **Conferences** window:

Step by Step

1) Click on in the row of the selected conference in the **Conferences** window and select **Join Conference** from the opening list.

The voice conference connection is being established. The corresponding entry in the conference list is indicated by and the **Call Control** dialog opens.

2) Click on in the **Call Control** function window.

A file-download dialog opens via which you need to download the program required for the web conference.

3) Click on the **Apply** button in this dialog.

After the successful download a security warning is displayed.

4) Confirm this security prompt with a click on the **Apply** button.

The connection to the web conference server is set up.

5.6.14 How to Initiate a Phone Handover via DTMF Keys

How to change a device you use in a conference:

Step by Step

1) Push the jkl 5 key.

2) Enter the phone number of the device you want to switch to.

3) Complete entering the phone number with the # key.

The entered phone number is announced for you to check.

4) You are then prompted to continue with one of the following options:

- Push the 1 key to perform the handover,
- push the abc 2 key to abandon the process.

6 Rule Interpreter – Routing Calls with Rules

The rule interpreter of the OpenScape UC Application is a tool that automatically analyzes incoming calls based on customized rules and that routes such calls to a specific contact or terminal.

> ***IMPORTANT:*** Members of a Multi-Line Hunt Group (MLHG) are not permitted to use the rule interpreter or the *Rules* feature.

If you are out on business frequently and not able to accept your incoming calls personally, the rule interpreter is a useful tool. For example, you can specify that calls arriving during a recurring meeting are automatically routed to your secretary.

> ***NOTICE:*** Forwarding settings have priority over rule interpreter settings. Conflicts between these settings may also occur. If you want to ensure that your rules are processed, you should deactivate call forwarding.

You can use the rule profile to control the routing of your incoming calls to other devices. Incoming-call routing may occur according to the following criteria:

- 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

You can activate a rule profile you have created by one of the following actions:

- Via the rule profile display combo box of the main menu by selecting the desired rule profile there
- Via the **Forwarding** function window
- Via the **main menu > menu > General ... > Common tab > Forwarding tab**

6.1 The Terminology of the Rule Interpreter

This section mentions and describes the functional units which provide the functionality of the rule interpreter and the understanding of which is important for the correct use of the rule interpreter.

Rule

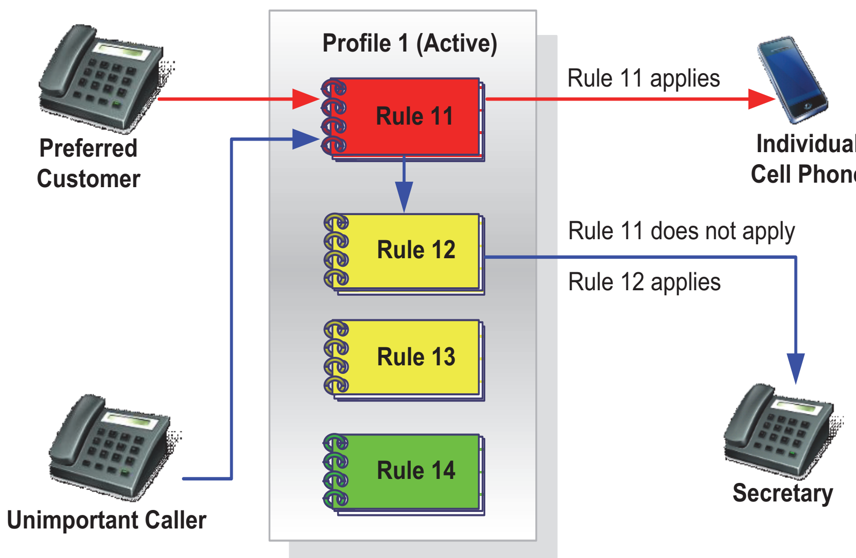
A rule defines how to handle incoming calls, for example if they are to be redirected or put through to you.

Redirecting the calls from preferred customers to the individual cell phone in case of absence.

The rule interpreter executes only the rules assigned to an activated profile.

Prioritization of rules

Within a profile, rules can generally belong to one of three priority groups: **High** , **Normal** and **Low** . They are itemized in a list in the associated profile. The list of rules within a profile is processed from top to bottom. The higher a rule is positioned in the list, the higher is its priority in the execution order. If a profile contains several rules with the same priority, the rule with the highest position in the rule list is processed first. The following figure illustrates the processing of rules of different priority within an active profile.



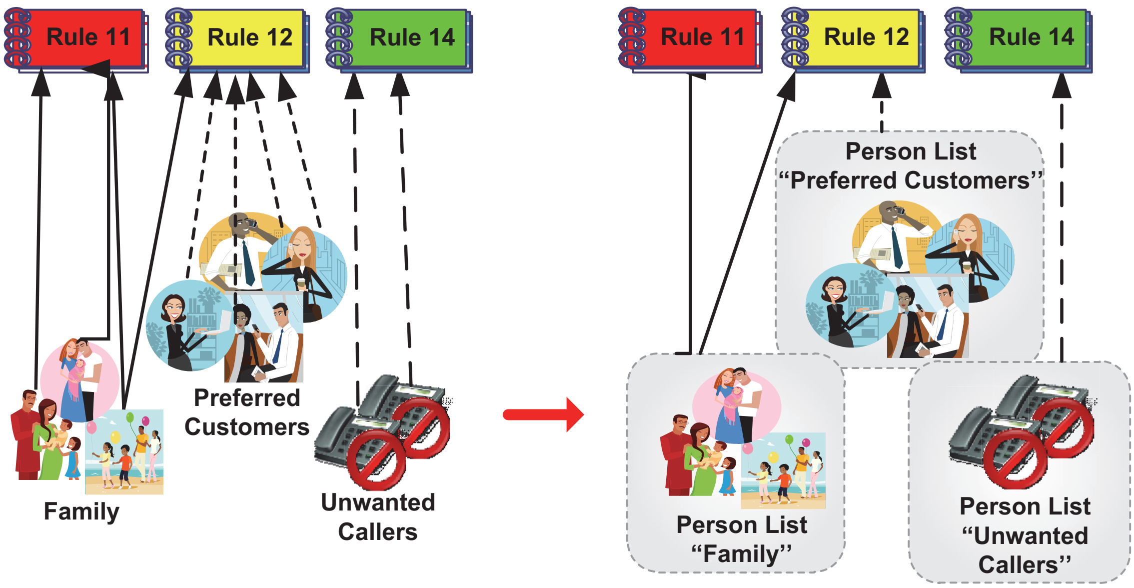
Four rules of different priority have been assigned to profile 1. Rule 11 has the highest priority. Rule 12 and rule 13 have medium priority, with the priority of rule 12 within this profile being higher than the one of rule 13, as rule 12 is on a higher position in the list of rules than rule 13. Rule 14 has the lowest priority within this profile. If profile 1 is active and a call comes in, rule 11 is processed first. As a result, the call is put through to your cell phone. In this case, the other rules are not checked at all. If rule 11 does not apply, rule 12 is processed as the next rule in the rule list. As a result, the call is redirected to your secretary.

Profile (rule profile)

The profile serves as rule container. It may contain one or several rules that can be prioritized against each other.

Only profiles may be activated, not individual rules. Consequently, a rule can only be executed if it was assigned to a profile.

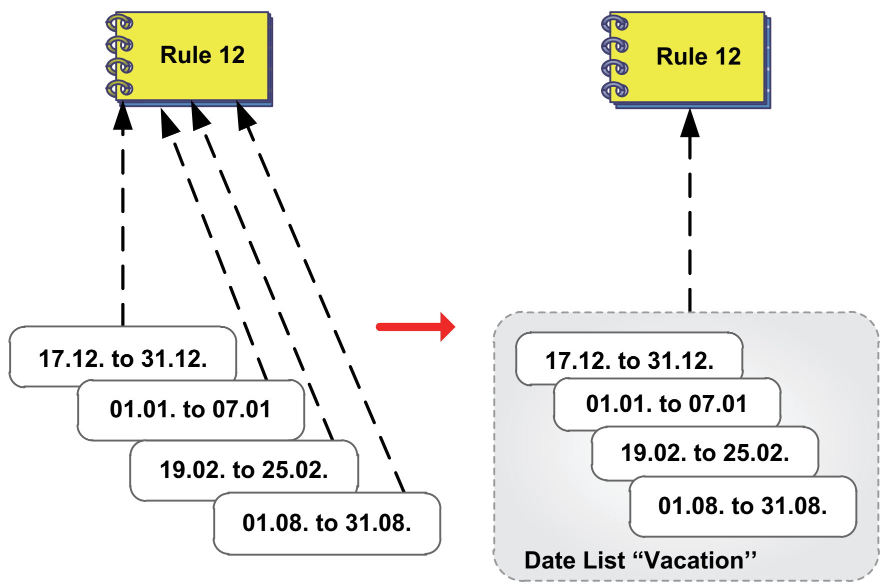
List of persons



There are many persons you might call. Assigning each single person to one or several rules can be tedious. Therefore, it is useful to group these persons, for example *Family*, *Preferred Customers*, *Unwanted Callers*. The rule interpreter provides lists of persons for this purpose. It is thus possible to integrate all members of your family in the *Family* list of persons. Several lists are possible.

Another advantage is that you can add further persons to each list and these persons are then automatically linked to a rule. The rule itself need not be modified.

Date lists



You can use a date list to determine that a rule is only to apply on specific days. For example, a rule may only apply during your short breaks and your annual holiday. In this case you can define single days and also periods in this rule. So that you need not alter the rule when your holidays are rescheduled, you can also specify a date list and link it to the rule. You only need to modify the list then, but the rule itself remains unchanged.

6.2 Applying the Rule Interpreter - Examples

The rule interpreter supports you in the most different situations. The following three scenarios are examples and intended to familiarize you with the rule interpreter functionality.

Scenario 1: "In the office" - Redirecting calls depending on phone numbers

In this scenario, all calls should basically go through to you. If, however, persons call who are itemized in your unwanted-callers list, these calls are to be routed to your secretary.

Scenario 2: "In meeting" - Redirecting calls depending on presence status and phone numbers

In this scenario, you take part in a company meeting. During the meeting, all calls are to be redirected automatically to the secretary. If, however, preferred customers or a member of your family call, the call is to be routed to you.

Scenario 3: "On business trip" - Redirecting calls depending on date and time

In this scenario, you are on a business trip and all calls during your absence are to be redirected to your secretary. If, however, preferred customers or a member of your family call, the call is to be routed to your cell phone. Your preferred customers may only call you from Monday to Friday 8:00 a.m. to 4:00 p.m. Your family may reach you any time.

Realization

You enable the mentioned sample scenarios in the rule interpreter by specifying profiles, rules, list of persons and date lists. You can adapt these scenarios to suit your requirements or create new scenarios, thereby building your own body of rules.

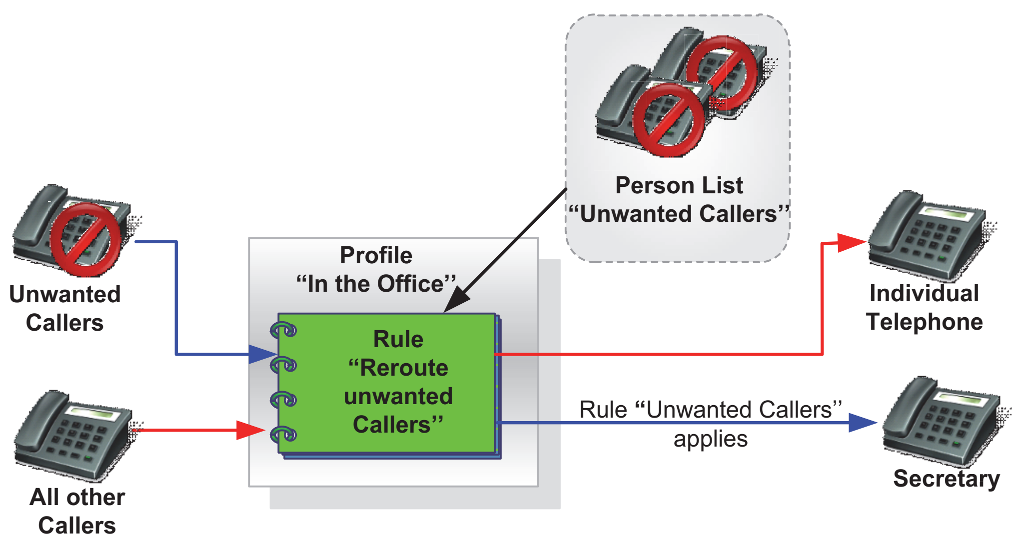
6.2.1 Scenario 1: "In the Office"

In this example scenario, calls from specific phone numbers defined in the list of unwanted callers are to be redirected to your secretary.

To set up the scenario, you need:

- a new profile "Redirect unwanted calls"
- a new list of persons "Unwanted callers"
- a new rule "Redirect unwanted calls"

Function



When a new call arrives, the rule interpreter checks automatically if the caller is on the "Unwanted callers" list of persons. If so, the call is redirected to the secretary. If not, the call is put through.

6.2.1.1 How to Configure the "In the Office" Rule Profile

This section contains the step-by-step guide to creating the example rule profile "In the Office".

Step by Step

1) Click on **menu** in the main menu and select the **Rules ...** menu option.

The **Rules** dialog opens.

2) Create a new profile called "In the Office".

a) Switch to the **Activate profile** tab.

b) Click on the **New** button.

A new list entry **New profile** is added to the **Profiles** list.

c) Click on the **New profile** label.

The profile name is represented as input field.

d) Name the new profile "`In the Office`" and push the **return key**.

The new profile is displayed with the new name "In the Office" in the **Profiles** list.

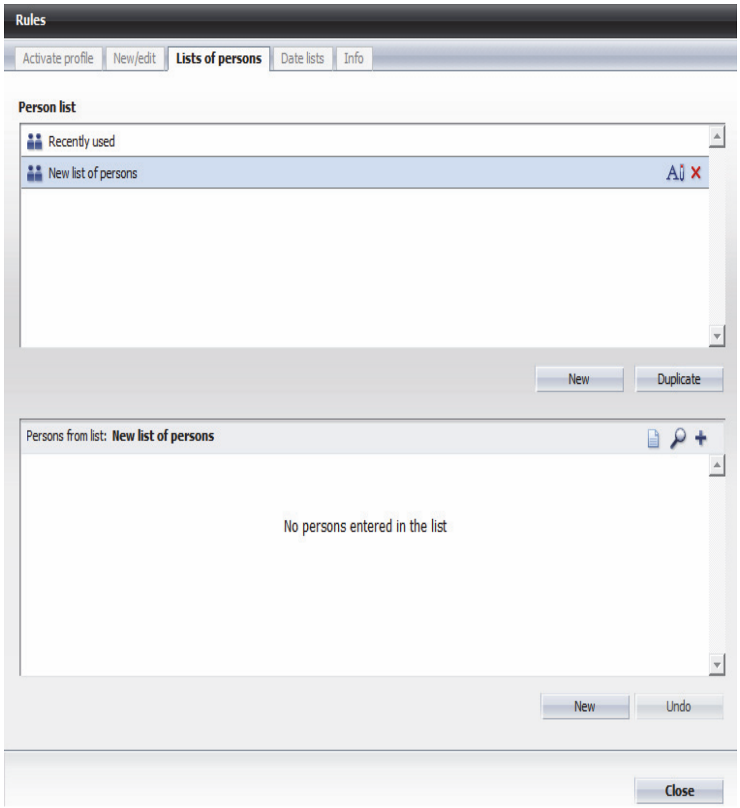
NOTICE: The "In the Office" profile has been created. However, it does not contain any rules yet.

---

3) Create the "Unwanted callers" list of persons.

a) Switch to the **Lists of persons** tab.

The following window (example) is displayed.



b) Click the **New** button under the **List of persons** section.

The entry **New list of persons** appears in the upper section of the **Lists of persons** tab.

c) Click the **New list of persons** label.

The list of persons name is represented as input field.

d) Enter the name `"Unwanted callers"` for the list of persons and push the **return key** on your keyboard.

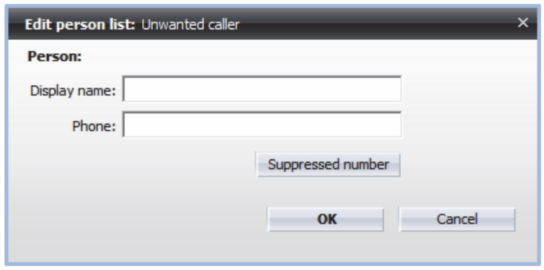
The "Unwanted callers" list of persons is displayed in the **List of persons** section. The list does not contain any person entries yet.

4) Add persons to the "Unwanted callers" list of persons.

Execute the following steps for all persons you wish to add to the list:

a) Click the **New** button in the bottom section.

The following input dialog opens.



b) Specify the name of the desired person in the **Display name** input field.

c) Enter the phone number of that person in the **Phone** input field.

d) Click on **OK**.

The input dialog closes. The new person entry has been integrated in the "Unwanted callers" list of persons.

5) Create a new rule named "Redirect calls".

a) Switch to the **New/edit** tab.

b) Click the **New** button in the upper section.

In the **Rule** section, a new rule named **New rule** is displayed.

c) Click the **New rule** label.

The rule name is represented as input field.

d) Enter the name `"Redirect calls"` for the new rule and push the **return key** on your keyboard.

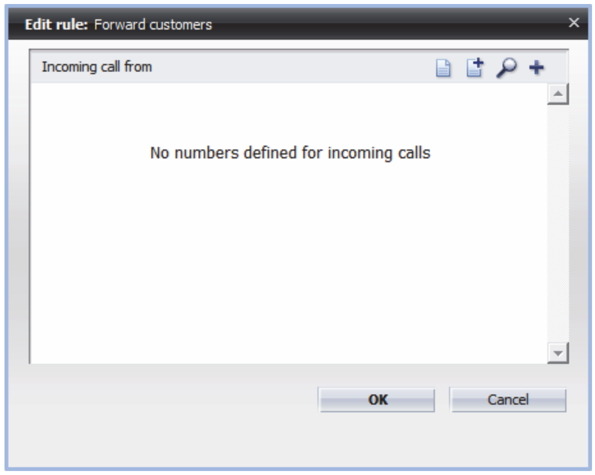
The rule "Redirect calls" appears in the **Rule** list.

6) Subsequently, perform the following settings for the rule "Redirect calls".

a) Set the priority of the rule "Redirect calls". To do so, activate the corresponding radio button, for example **Low**.

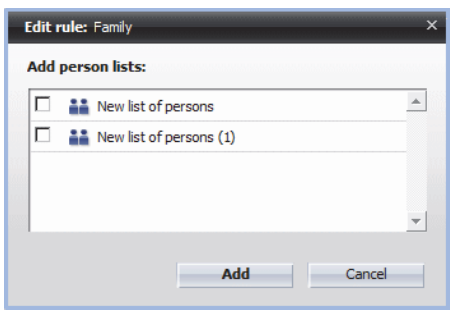
b) In the lower section, click on **If call from**.

The following dialog opens.



c) Click on .

The following selection dialog opens.



d) Select the "Unwanted callers" list of persons and click the **Add** button.

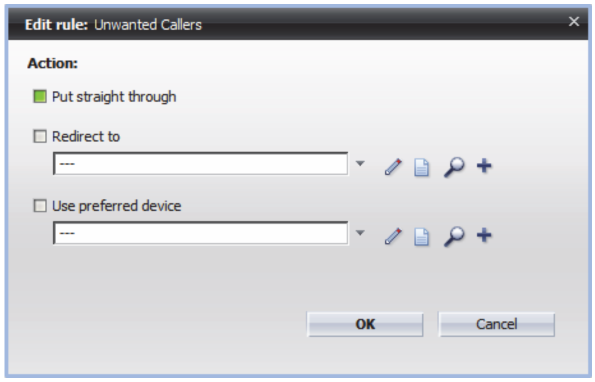
The list of persons you selected has been added to the rule. The selection dialog closes.

e) Click on **OK**.

Your rule settings in the **If call from** section have been applied.

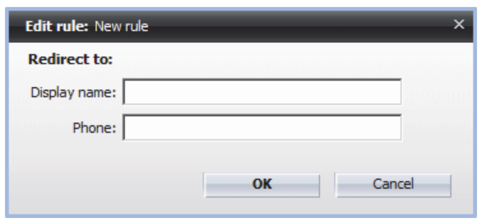
f) In the lower section, click **Action**.

The following window opens:



g) Click on for the **Redirect to** function.

The following input dialog opens:



h) Enter the secretary's name and phone number.

i) Click on **OK**.

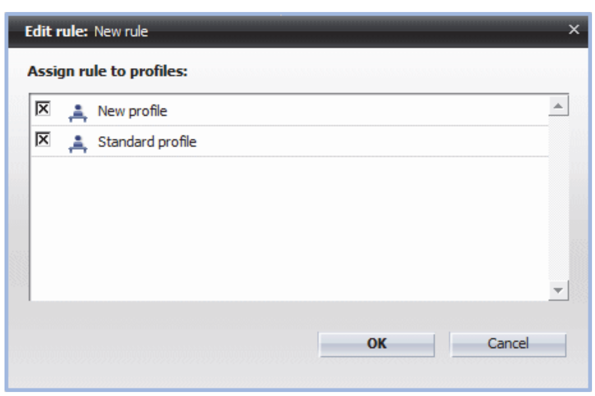
The input dialog closes. The **Redirect to** function is active ().

j) Click on **OK**.

The **Action** you have defined appears in the rule settings.

k) Click on **Assigned profiles**.

The following selection dialog opens:



l) Select the profile "In the Office" and click **OK**.

The selection dialog closes. The profile "In the Office" is displayed under **Assigned profiles**. The rule "Redirect calls" has been completely configured for its use in the profile "In the Office".

7) Close the **Rules** configuration dialog with a click on **Close**.

8) Activate the "In the office" profile.

a) Click on the combo box in the main menu.

A selection menu opens.

b) In this menu, select the rule profile "In the Office" marked by the symbol .

The symbol changes to . The "In the Office" profile is active.

You have created, configured and activated the "In the Office" rule profile. The rules of this profile are used for routing your incoming calls.

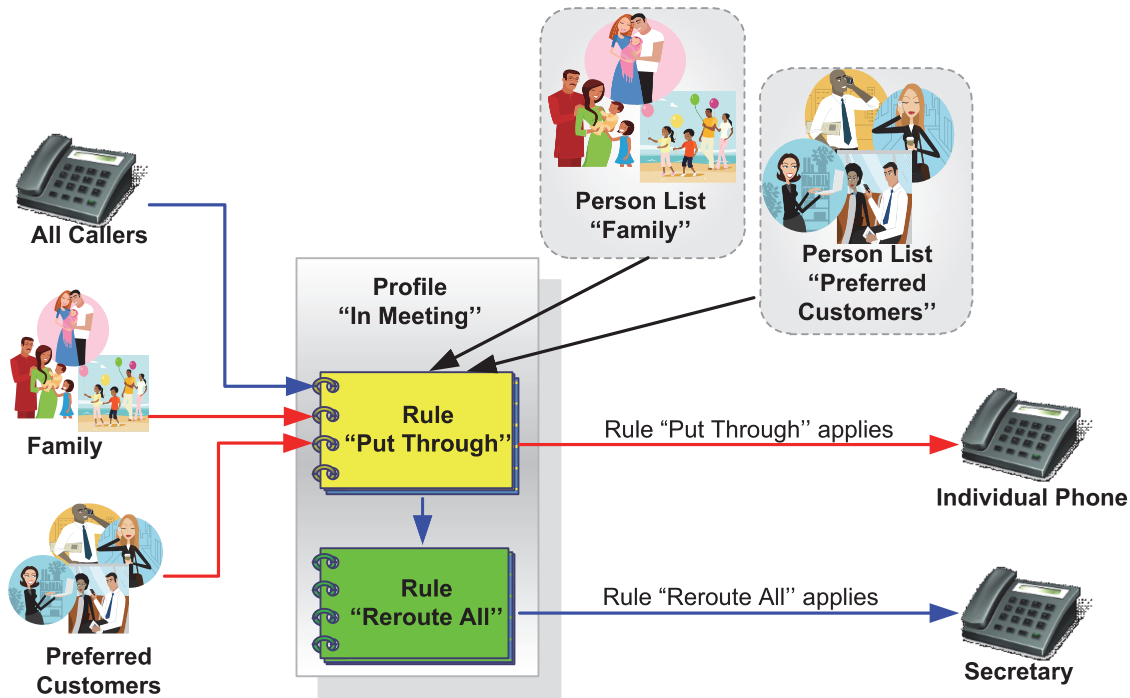
6.2.2 Scenario 2: "In Meeting"

Supposed, you take part in a company meeting and have set your OpenScape UC Application presence status to **In meeting**. All calls during this meeting are redirected to your secretary. Calls from members of your family or preferred customers are redirected to your cell phone.

To set up the scenario, you need:

- a new profile "In meeting"
- a new list of persons "Family"
- a new list of persons “Preferred customers“
- a new rule “Put Through“
- a new rule "Redirect all"

Function



First, the rule "Put through" checks whether your presence status is "In meeting" and whether the call comes from a member of your family or from a preferred customer. If the call comes from one of the two persons, the call is put through. If the conditions are not fulfilled, the call is routed to your secretary by the “Reroute All” rule.

The "Put through" rule must have a higher priority (for example Normal) as the "Redirect all" rule (for example Low). The members of your family as well as the preferred customers would otherwise always reach your secretary as the "Put through" rule would never be applied.

6.2.2.1 How to Configure the "In Meeting" Rule Profile

This section contains the step-by-step guide to creating the example rule profile "In meeting".

Step by Step

1) Click on **menu** in the main menu and select the **Rules...** menu option.

The **Rules** dialog opens.

2) Create a new profile called "In meeting".

a) Switch to the **Activate profile** tab.

b) Click on the **New** button.

A new list entry **New profile** is added to the **Profiles** list.

c) Click on the **New profile** label.

The profile name is represented as input field.

d) Enter the name `"In meeting"` for the new profile and push the **return key**.

The new profile is displayed with the name "In meeting" in the **Profiles** list.

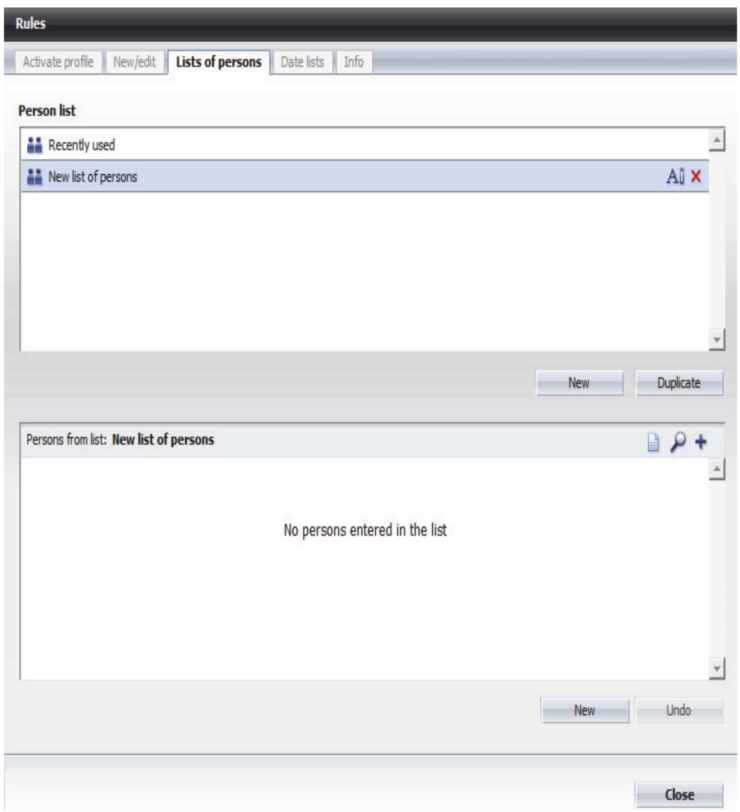
NOTICE: The "In meeting" profile has been created. However, it does not contain any rules yet.

---

3) Create the "Family" list of persons.

a) Switch to the **Lists of persons** tab.

The following window (example) is displayed.



b) Click the **New** button under the **List of persons** section.

The **New list of persons** entry appears in the **List of persons** list.

c) Click the **New list of persons** label.

The list of persons name is represented as input field.

d) Enter the name `"Family"` for the list of persons and push the **return key** on your keyboard.

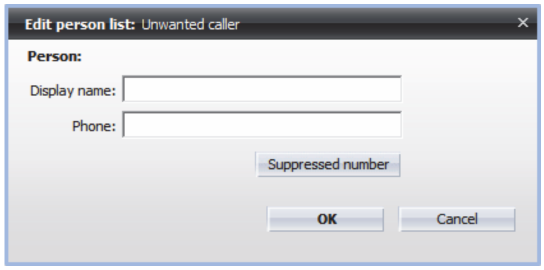
The "Family" list of persons is displayed in the **List of persons** section. The list does not contain any entries yet.

4) Add a person to the "Family" list of persons.

Execute the following steps for all persons you wish to add to the list:

a) Click the **New** button in the bottom section.

The following input dialog opens.



b) Specify the name of the desired person in the **Display name** input field.

c) Enter the phone number of that person in the **Phone** input field.

d) Click on **OK**.

The input dialog closes. The new person entry has been integrated in the "Family" list of persons.

5) Create the "Preferred customers" list of persons.

a) Click the **New** button under the **List of persons** section.

The entry **New list of persons** appears in the **List of persons** in the upper section of the **Lists of persons** tab.

b) Click the **New list of persons** label.

The list of persons name is represented as input field.

c) Enter the name `"Preferred customers"` for the list of persons and push the **return key** on your keyboard.

The "Preferred customers" list of persons is displayed in the **List of persons** section. The list does not contain any entries yet.

d) Add persons to the "Preferred customers" list of persons.

6) Create a new rule named "Put through".

a) Switch to the **New/edit** tab.

b) Click the **New** button in the upper section.

In the **Rule** section, a new rule named **New rule** is displayed.

c) Click the **New rule** label.

The rule name is represented as input field.

d) Enter the name `"Put through"` for the new rule and push the **return key** on your keyboard.

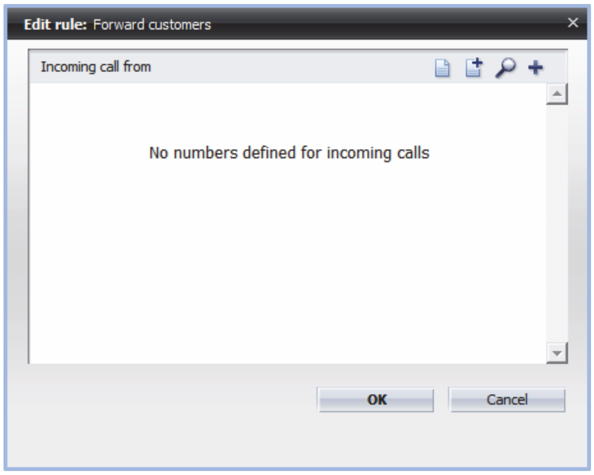
The rule "Put through" appears in the **Rule** list.

7) Perform the following settings for the rule "Put through".

a) Set the priority of the rule "Put through". To do so, activate the corresponding radio button, for example **Normal**.

b) In the lower section, click on **If call from**.

The following dialog opens.



c) Click on .

A selection dialog opens that features the existing lists of persons.

d) Select the "Family" and "Preferred customers" lists of persons.

e) Click on the **Add** button.

The selected lists of persons have been added to the rule. The selection dialog closes.

f) Click on **OK**.

Your rule settings in the **If call from** section have been applied.

g) In the lower section, click on **If my status is**.

A selection dialog opens that allows you to set the desired presence status.

h) Activate the **In meeting** check box and click **OK**.

The selection dialog closes.

i) Keep the default setting **Put straight through** under **Action**.

j) Click on **Assigned profiles**.

A selection dialog opens that allows you to set the desired rule profile already defined.

k) Select the profile "In meeting" and click on **OK**.

The selection dialog closes. The profile "In meeting" is displayed under **Assigned profiles**. The rule "Put through" has been completely configured for its use in the "In meeting" profile.

8) Create another new rule named `"Redirect all"`.

a) Click the **New** button in the upper section.

In the **Rule** section, a new rule named **New rule** is displayed.

b) Click the **New rule** label.

The rule name is represented as input field.

c) Enter the name `"Redirect all"` for the new rule and push the **return key** on your keyboard.

The rule "Redirect all" appears in the **Rule** list.

9) Perform the following settings for the rule "Redirect all".

a) Set the priority of the rule "Redirect all". To do so, activate the corresponding radio button, for example **Low**.

b) Under **If call from**, keep the default setting **All**.

c) In the lower section, click on **If my status is**.

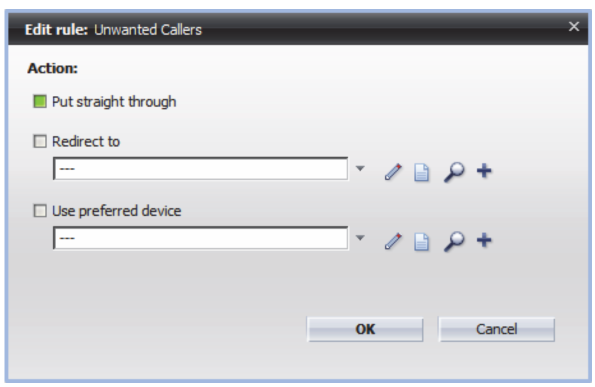
A selection dialog opens that allows you to set the desired presence status.

d) Activate the **In meeting** check box and click on **OK**.

The selection dialog closes.

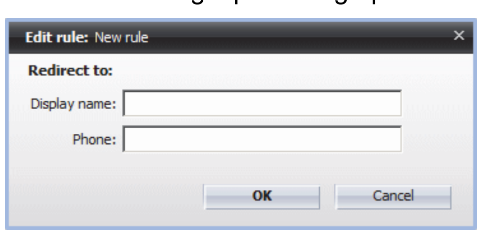
e) In the lower section, click **Action**.

The following window opens:



f) Click on + for the **Redirect to** function.

The following input dialog opens:



g) Enter the secretary's name and phone number.

h) Click on **OK**.

The input dialog closes. The **Redirect to** function is active ( ).

i) Click on **OK**.

The **Action** you have defined appears in the rule settings.

j) Click on **Assigned profiles**.

A selection dialog opens that allows you to set the desired rule profile already defined.

k) Select the profile "In meeting" and click on **OK**.

The selection dialog closes. The profile "In meeting" is displayed under **Assigned profiles**. The rule "Redirect all" has been completely configured for its use in the profile "In meeting".

10) Close the **Rules** dialog by clicking the **Close** button.

11) Activate the "In meeting" profile.

a) Click on the combo box in the main menu.

A selection menu opens.

b) In this menu, select the rule profile "In meeting" marked by the symbol .

The symbol changes to . The "In meeting" profile is active.

You have created, configured and activated the "In meeting" rule profile. The rules of this profile are used for routing your incoming calls.

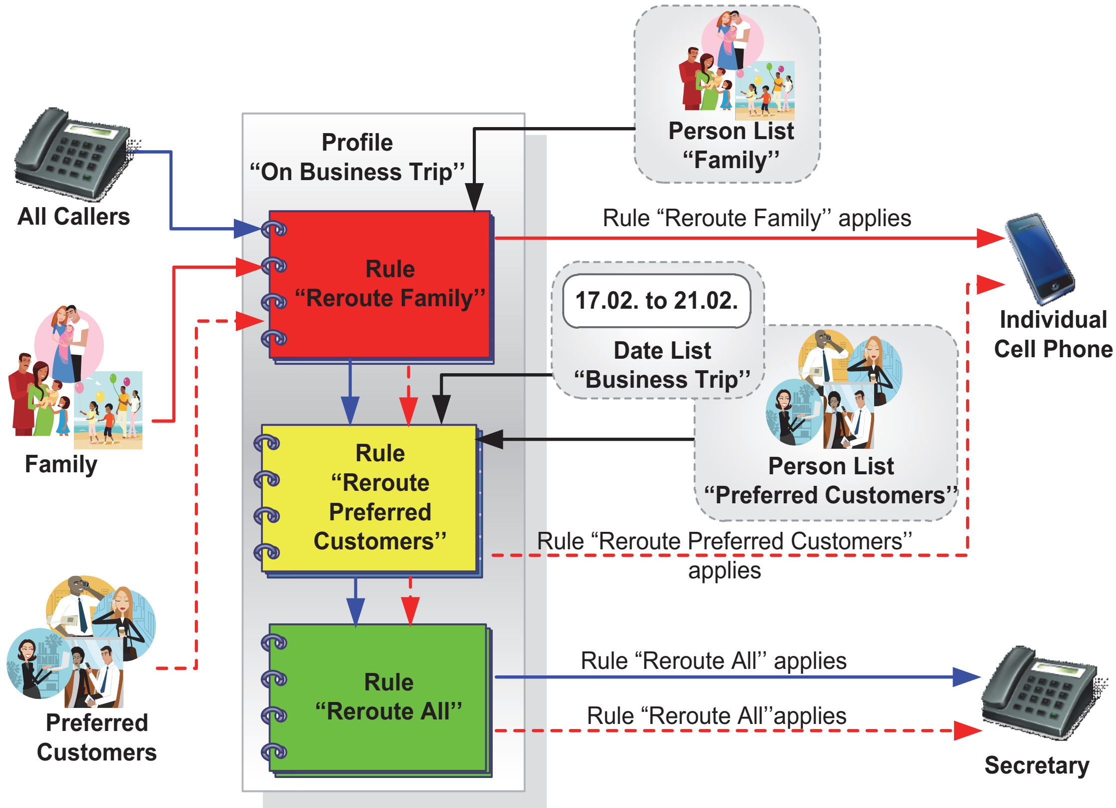
6.2.3 Scenario 3: "On Business Trip"

You are on a business trip for a week. During this time, all calls from members of your family and preferred customers are to be redirected to your cell phone and the rest of calls to your secretary. Your family should always be able to reach you, the preferred customers, however, only during the business hours from 08:00 a.m. to 4:30 p.m.

To set up the scenario, you need:

- a new profile "On Business trip"
- a new list of persons "Family"
- a new list of persons “Preferred customers“
- a date list "Business trip"
- a new rule "Redirect family"
- a new rule “Redirect preferred customers“
- a new rule "Redirect all"

Function



First, the “Redirect family” rule checks whether the call comes from a member of your family. If so, the call is redirected to your cell phone. If not, the “Reroute preferred customers” rule will check whether the call comes from a preferred customer and whether he/she calls between 08:00 a.m. and 4:30 p.m. If both conditions are met, the caller is routed to your cell phone. However, if a preferred customer dials your number outside business hours (8:00 a.m. to 4:30 p.m.), the call is redirected to the secretary by the "Redirect all" rule.

The order of rules is important: The "Redirect family" rule has the highest priority, the "Redirect preferred customers" rule has medium priority and the "Redirect all" rule has the lowest priority. If, for example, the “Reroute all” rule came in second position, you could be reached by your family but the preferred customers would always talk to your secretary as the “Reroute preferred customers” rule would never be applied.

6.2.3.1 How to Configure the "On Business Trip" Rule Profile

This section contains the step-by-step guide to creating the example rule profile "On Business Trip".

Step by Step

1) Click on **menu** in the main menu and select the **Rules ...** menu option.

The **Rules** dialog opens.

2) Create a new profile called ”On Business Trip”.

a) Switch to the **Activate profile** tab.

b) Click on the **New** button.

A new list entry **New profile** is added to the **Profiles** list.

c) Click on the **New profile** label.

The profile name is represented as input field.

d) Enter the name `"On Business Trip"` for the new profile and push the **return key**.

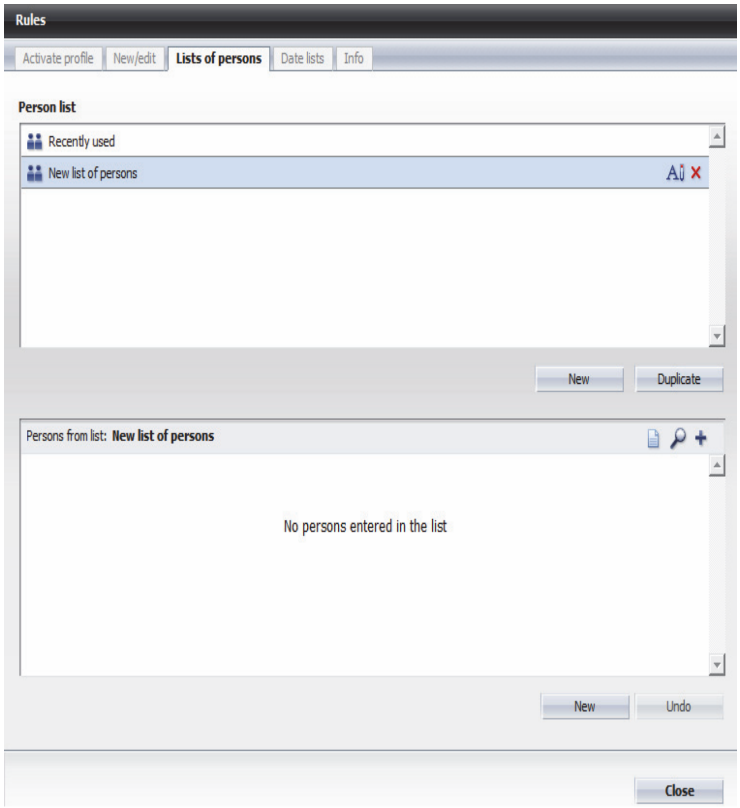
The new profile is displayed with the new name "On Business Trip" in the **Profiles** list.

NOTICE: The "On Business Trip" profile has been created. However, it does not contain any rules yet.

3) Create the "Family" list of persons.

a) Switch to the **Lists of persons** tab.

The following window (example) is displayed.



b) Click the **New** button under the **List of persons** section.

The **New list of persons** entry appears in the **List of persons** list.

c) Click the **New list of persons** label.

The list of persons name is represented as input field.

d) Enter the name "Family" for the list of persons and push the **return key** on your keyboard.

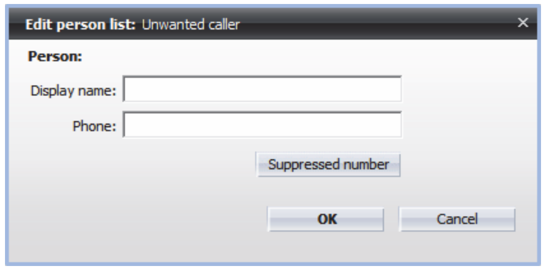
The "Family" list of persons is displayed in the **List of persons** section. The list does not contain any person entries yet.

4) Add persons to the "Family" list of persons.

Execute the following steps for all persons you wish to add to the list:

a) Click the **New** button in the bottom section.

The following input dialog opens.



b) Specify the name of the desired person in the **Display name** input field.

c) Enter the phone number of that person in the **Phone** input field.

d) Click on **OK**.

The input dialog closes. The new person entry has been integrated in the list of persons.

5) Create the "Preferred customers" list of persons.

a) Click the **New** button under the **List of persons** section.

The **New list of persons** entry appears in the **List of persons** list.

b) Click the **New list of persons** label.

The list of persons name is represented as input field.

c) Enter the name `"Preferred customers"` for the list of persons and push the **return key** on your keyboard.

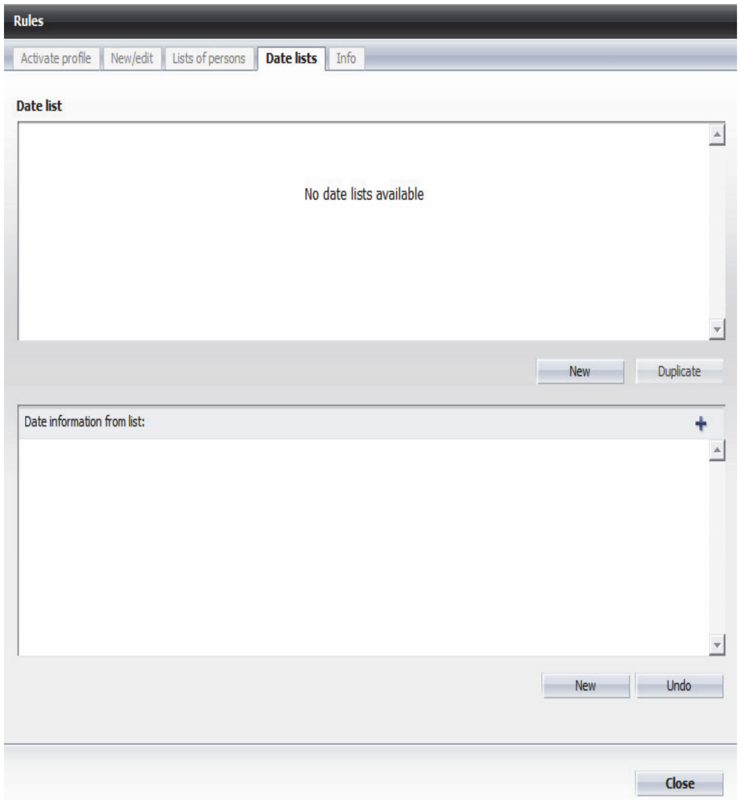
The list of persons "Preferred customers" is displayed in the **List of persons** section. The list does not contain any entries yet.

d) Add persons to the "Preferred customers" list of persons.

6) Create the date list "Business trip".

a) Switch to the **Date lists** tab.

The following window (example) is displayed.



b) Click on the **New** button under the **Date list** section.

The entry **New date list** appears in the **Date list** section of the **Date lists** tab.

c) Click the **New date list** label.

The data list name is represented as input field.

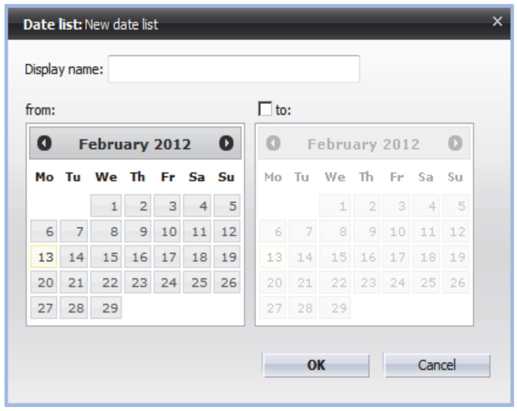
d) Enter the name "Business trip" for the date list and push the **return key** on your keyboard.

The date list "Business trip" is displayed in the **Date list** section. The list does not contain any date entries yet.

7) Add a date information to the "Business trip" date list.

a) Click the **New** button in the bottom section.

The following input dialog opens.



b) In the **Display name** input field, enter an expressive name for the date information.

c) Select the start date (**from**) in the left calendar section.

d) Select the end date (**to**) in the right calendar section.

e) Click on **OK**.

The input dialog closes. The new date entry has been integrated in the date list "Business trip".

8) Create a new rule named "Redirect family".

a) Switch to the **New/edit** tab.

b) Click the **New** button in the upper section.

In the **Rule** section, a new rule named **New rule** is displayed.

c) Click the **New rule** label.

The rule name is represented as input field.

d) Enter the name `"Redirect family"` for the new rule and push the **return key** on your keyboard.

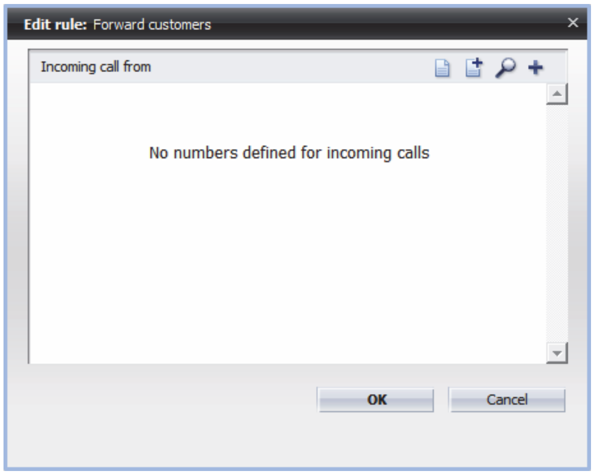
The rule "Redirect family" appears in the **Rule** list.

9) Perform the following settings for the rule "Redirect family".

a) Set the priority of the rule "Redirect family". To do so, activate the corresponding radio button, for example **High**.

b) In the lower section, click on **If call from**.

The following dialog opens.



c) Click on .

A selection dialog opens that features the existing lists of persons.

d) Select the "Family" list of persons.

e) Click on the **Add** button.

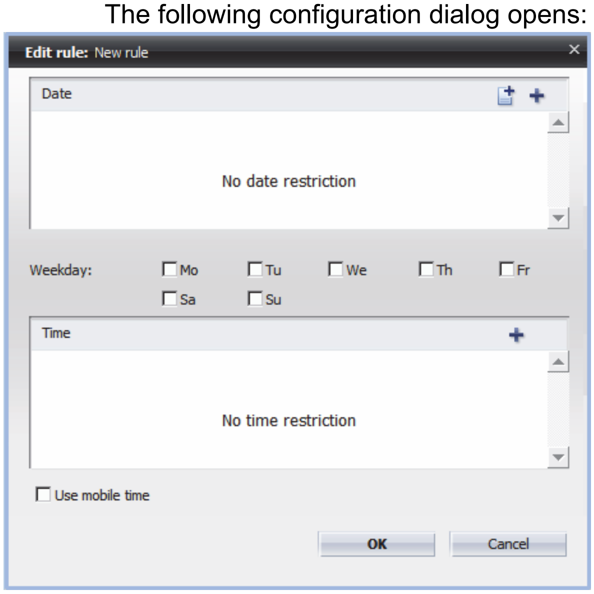
The selected list of persons has been added to the rule. The selection dialog closes.

f) Click on **OK**.

Your rule settings in the **If call from** section have been applied.

g) Click **If date/time**.

The following configuration dialog opens:



h) Click on in the **Date** section.

A selection dialog opens that features the existing date lists.

i) Select the date list "Business trip".

j) Click on the **Add** button.

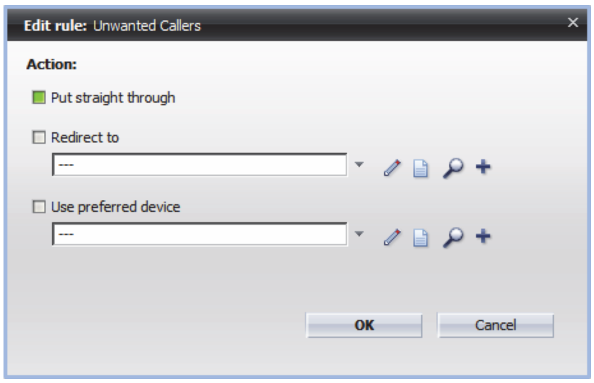
The selection dialog closes. The date list "Business trip" is displayed in the **Date** section.

k) Click the **OK** button in the configuration dialog.

The configuration dialog closes.

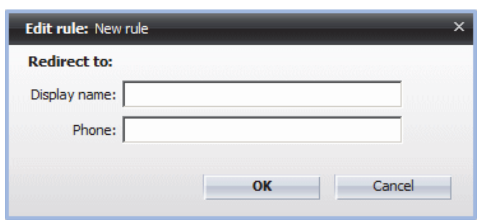
l) In the lower section of the **New/edit** tab, click **Action**.

The following window opens:



m) Click on + for the **Redirect to** function.

The following input dialog opens:



n) Under **Display name**, enter, for example, Cell phone, and under Phone, the phone number of your cell phone.

o) Click on **OK**.

The input dialog closes. The **Redirect to** function is active ( ).

p) Click on **OK**.

The **Action** you have defined appears in the rule settings.

q) Click on **Assigned profiles**.

A selection dialog opens that allows you to set the desired rule profile already defined.

r) Select the profile "On Business Trip" and click on **OK**.

The selection dialog closes. The profile "On Business Trip" is displayed under **Assigned profiles**. The rule "Redirect family" has been completely configured for its use in the profile "On Business Trip".

10) Create another new rule named “Reroute preferred customers“.

a) In the upper section of the **New/edit** tab, click on the **New** button.

In the **Rule** section, a new rule named **New rule** is displayed.

b) Click the **New rule** label.

The rule name is represented as input field.

c) Enter the name `"Redirect preferred customers"` for the new rule and push the **return key** on your keyboard.

The rule "Redirect preferred customers" appears in the **Rule** list.

11) Perform the following settings for the rule "Redirect preferred customers".

a) Set the priority of the rule "Redirect preferred customers" by activating the corresponding radio button, for example **Normal**.

b) In the lower section, click on **If call from**.

c) In the dialog that opens click on .

A selection dialog opens which features the existing lists of persons.

d) Select the "Preferred customers" list of persons.

e) Click on the **Add** button.

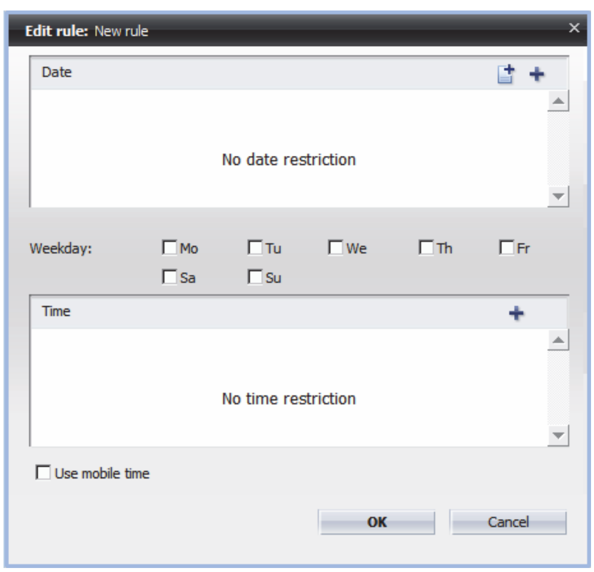
The selected list of persons has been added to the rule. The selection dialog closes.

f) Click on **OK**.

Your rule settings in the **If call from** section have been applied.

g) Click **If date/time**.

The following configuration dialog opens:



h) Click on  in the **Date** section.

A selection dialog opens that features the existing date lists.

i) Select the date list "Business trip".

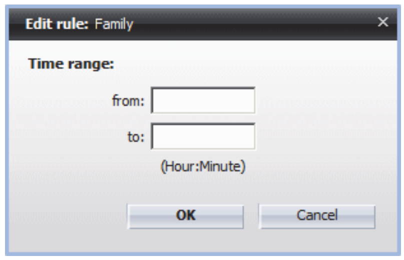
j) Click on the **Add** button.

The selection dialog closes. The date list "Business trip" is displayed in the **Date** section.

k) Activate the check boxes **Mo**, **Tu**, **We**, **Th**, **Fr** to define on which days of the week to apply the rule "Redirect preferred customers".

l) Click on + in the **Time** section.

The following input dialog opens.



m) To specify the **Time range**, enter for example 08:00 a.m. under **from** and 4:30 p.m. under **to**.

n) Click on **OK**.

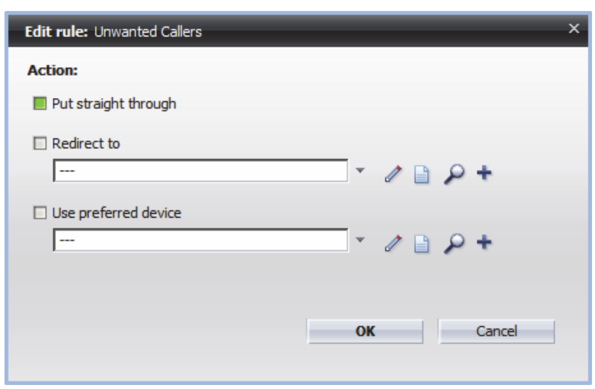
The input dialog closes. The configured time range is displayed in the **Time** section.

o) Click on **OK**.

The configuration dialog closes. Your settings have become valid.

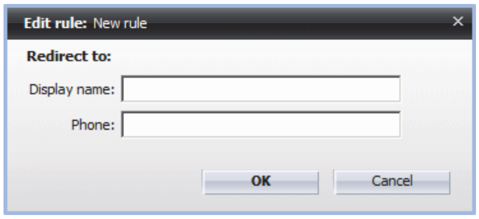
p) In the lower section, click on **Action**.

The following window opens:



q) Click on + for the **Redirect to** function.

The following input dialog opens:



r) Enter the secretary's name and phone number.

s) Click on **OK**.

The input dialog closes. The **Redirect to** function is active ( ).

t) Click on **OK**.

The **Action** you have defined appears in the rule settings.

u) Click on **Assigned profiles**.

A selection dialog opens that allows you to set the desired rule profile already defined.

v) Select the profile "On Business Trip" and click on **OK**.

The selection dialog closes. The profile "On Business Trip" is displayed under **Assigned profiles**. The rule "Redirect preferred customers" has been completely configured for its use in the profile "On Business Trip".

12) Create another new rule named "Redirect all".

a) In the upper section of the **New/edit** tab, click on the **New** button.

In the **Rule** section, a new rule named **New rule** is displayed.

b) Click the **New rule** label.

The rule name is represented as input field.

c) Enter the name `"Redirect all"` for the new rule and push the **return key** on your keyboard.

The rule "Redirect all" appears in the **Rule** list.

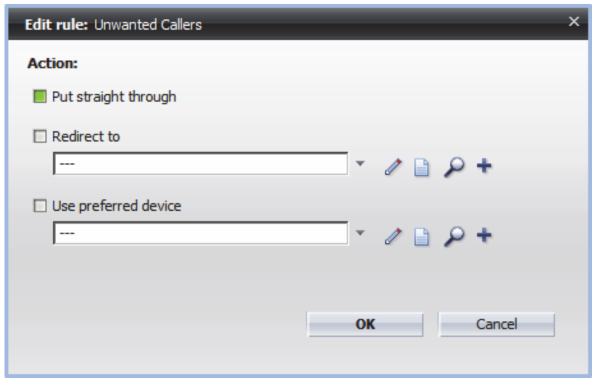
13) Perform the following settings for the rule "Redirect all".

a) Set the priority of the rule "Redirect all" by activating the corresponding radio button, for example **Lowl**.

b) Under **If call from**, keep the default setting **All**.

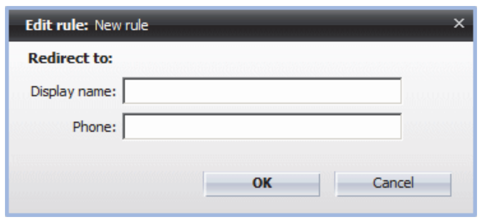
c) In the lower section, click on **Action**.

The following window opens:



d) Click on + for the **Redirect to** function.

The following input dialog opens:



e) Enter the secretary's name and phone number.

f) Click on **OK**.

The input dialog closes. The **Redirect to** function is active ( ).

g) Click on **OK**.

The **Action** you have defined appears in the rule settings.

h) Click on **Assigned profiles**.

A selection dialog opens that allows you to set the desired rule profile already defined.

i) Select the profile "On Business Trip" and click on **OK**.

The selection dialog closes. The profile "On Business Trip" is displayed under **Assigned profiles**. The rule "Redirect all" has been completely configured for its use in the profile "On Business Trip".

14) Close the Rules dialog by clicking the **Close** button.

15) Activate the “On Business Trip” profile.

a) Click on the combobox in the main menu.

A selection menu opens.

b) In this menu, select the rule profile "On Business Trip" marked by the symbol ◇ .

The symbol ◇ changes to ◇ . The "On Business Trip" profile is active.

You have created, configured and activated the "On Business Trip" rule profile. The rules of this profile are used for routing your incoming calls.

6.3 Functions and Interface of the Rule Interpreter

This section contains reference information about the rule interpreter tool. This information is intended to serve as reference for the functions and the user interface of the rule interpreter. The settings you see in the figures are examples and need to be replaced with the scenario settings or your own ones.

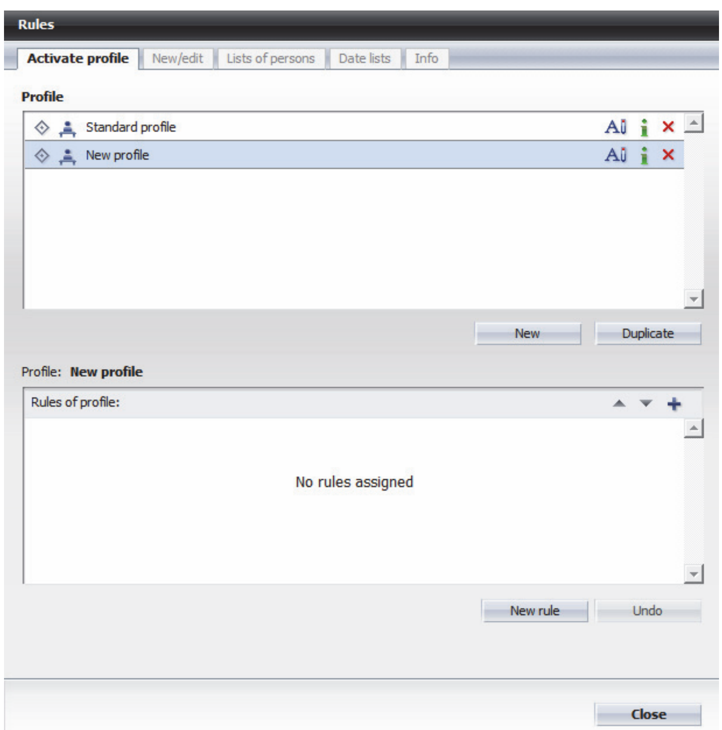
All dialogs in which you define profiles, rules, lists of persons and date lists can be invoked via the main menu under **menu > Rules ...**.

6.3.1 Activate profile Tab

You can use this tab to manage profiles. Forexample, you can create a new profile, delete a profile or change the priority of individual, assigned rules.

Invoking the dialog

Click on menu in the main menu and select the **Rules...** option. The **Rules** settings dialog opens. Switch to the **Activate profile** tab. The dialog may look like this:

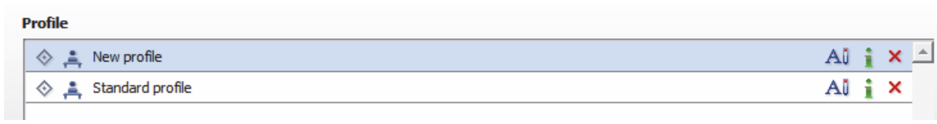


The **Activate profile** tab is divided into two sections:

- **Profiles** - All configured rule profiles are listed here.
- **Rules of profile:** - The rules assigned to a profile selected in the **Profiles** section are listed here.

Controls in the Profiles section

This section may look like this:



This section offers access to the following functions:

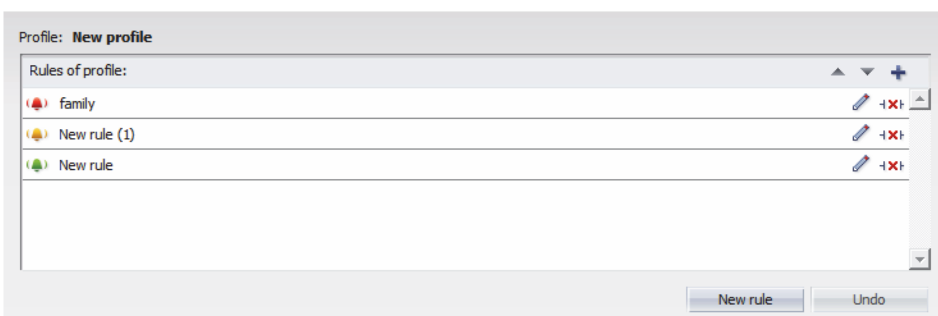
- - You activate/deactivate the profile by clicking this button that precedes the profile name. An active profile is indicated by .
- - Click this button to modify the name of a profile.

> ***NOTICE:*** You can also directly click the name of the profile to rename it.

- - Click this button to view information about the profile: the rules to which the profile is linked and the functions of these rules.
- - Click this button to delete a profile.
- **New** button - Click this button to create a new profile.
- **Duplicate** button - With a click on the **Duplicate** button, you can create a new profile by duplicating an already existing profile.

Controls in the Rules of profile section

This section may look like this:

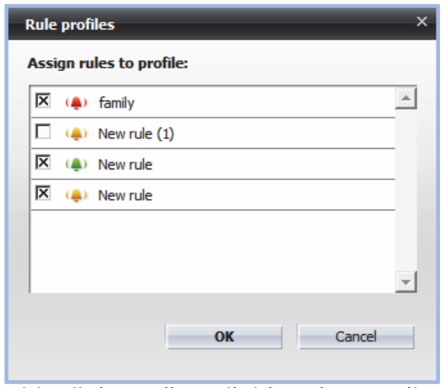


This area shows the rules, with priority groups marked as follows: - **High**, - **Normal**, - **Low**. This area offers access to the following functions:

- - Click this button to move the selected rule up.
- - Click this button to move the selected rule down.

> ***NOTICE:*** A rule can only be moved up and down within the same priority group (high, normal or low).

- ➕ - Click this button to assign new rules to the profile. The following dialog opens:



In this dialog, all available rules are listed. Activate the corresponding check box and click **OK** to assign the desired rule(s) to the currently selected profile.

- ✎ - Click this button to edit the rule settings. The dialog changes to the **New/edit** tab.
- ✕ - Click this button to remove the selected rule from the profile. The rule still exists, but is no longer linked to this profile.
- **New rule** button - Click the **New rule** button to create a new rule for the current profile. The dialog changes automatically to the **New/edit** tab.
- **Undo** button - Click this button to undo the changes made to the rules of the corresponding profile.

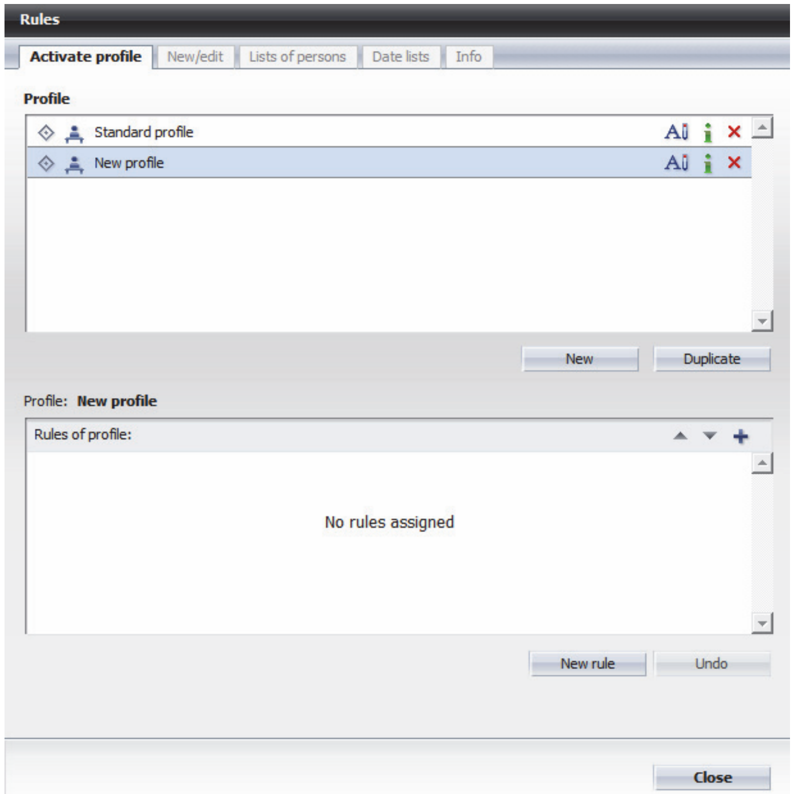
6.3.1.1 How to Create a new Profile

This section describes how to create a new profile. The rules already created or to be created are grouped under a profile.

Step by Step

1) Open the **Rules** dialog via the **main menu > menu > Rules ...**.

2) Switch to the **Activate profile** tab.



3) Click the **New** button.

In the **Profiles** section, a profile named **New profile** is created.

4) Click on the name **New profile** to change it.

The profile name is represented as input field.

5) Enter the new name and push the **return key**.

The profile name should now reflect your change. The new profile has been created. However, it has not been assigned any rules yet.

The new profile has been created. However, it has not been assigned any rules yet.

6.3.1.2 How to Activate a Rule Profile

So that a profile and the rules linked to it can take effect, it must be activated.

Step by Step

1) Click on the combo box in the main menu.

A selection menu opens.

2) In this menu, select the desired rule profile marked by the symbol .

The symbol changes to .

The selected profile is active.

6.3.1.3 How to Disable a Rule Profile

Deactivate an active rule profile to accept calls on your workstation as usual.

Step by Step

1) Click on the combo box in the main menu.

A selection menu opens.

2) Select **Deactivate rule profile**.

The selected profile is inactive.

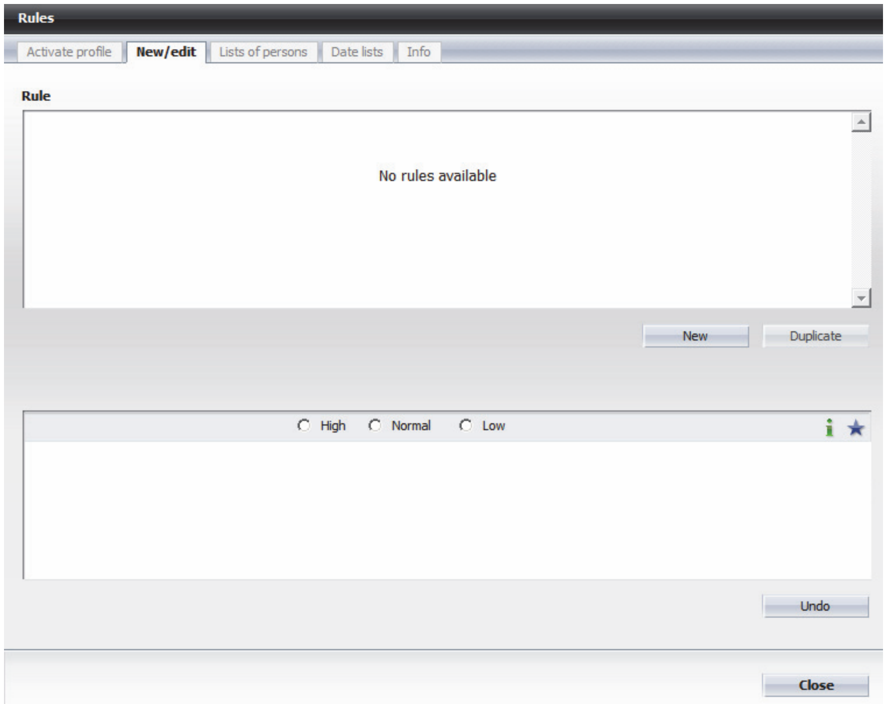
6.3.2 New/edit Tab

You can use this tab to manage and configure rules. You may, for example, create and configure a new rule, delete an existing rule or change your settings.

NOTICE: Note that a rule can only be executed if it is assigned to a rule profile.

Invoking the dialog

Click on menu in the main menu and select the Rules... option. The configuration dialog Rules with the **New/edit** tab opens. This tab looks as follows by default:

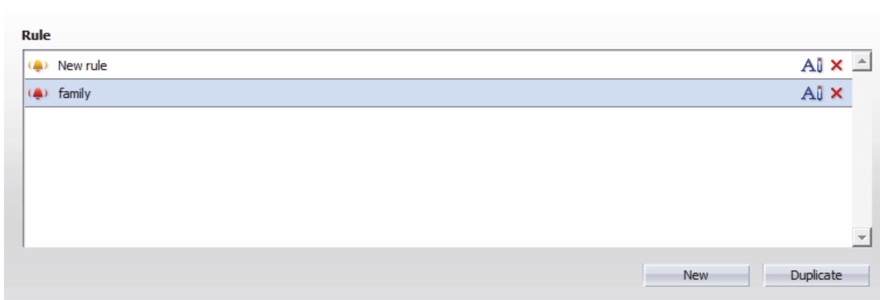


The **New/edit** tab is divided into two sections:

- **Rule** - This section lists all the rules you have configured for call forwardings.
- Rule settings - The settings of a rule selected in the **Rule** section are displayed here.

Controls in the Rule section

This section may look like this:



This section offers access to the following functions:

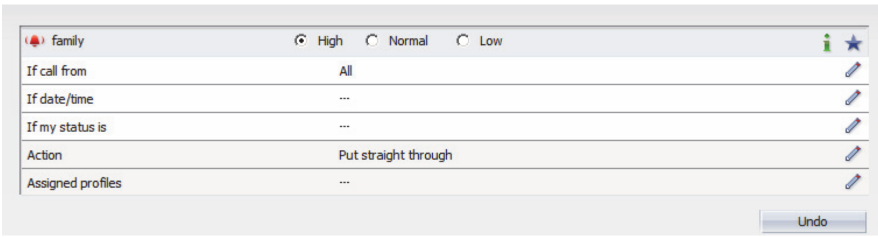
- - Click this button to modify the name of a rule.

NOTICE: You can also directly click the name of the rule list to rename it.

- ✕ - Click this button to delete a profile.
- **New** button - Click this button to create a new rule.
- **Duplicate** button - With a click on the **Duplicate** button, you can create a new rule by duplicating an already existing rule.

Operating elements in the rule settings section

This section may look like this:



This section offers access to the following functions:

- Define the priority group - For each rule, you can define the following priority groups by activating the corresponding radio button: - High, - Normal, - Low.
- With a click on this icon the rule settings are summarized in a separate dialog.
- - By clicking this icon, the selected rule is set to the highest priority and added to all profiles.

You expect a phone call from your garage and you want this call be routed to your cell phone at any rate and any time, no matter which profile is currently active. You thus need not modify each single profile.

> ***NOTICE:*** To undo this function, you can either delete the affected rule (✕) or deactivate the check boxes for each profile via the rule setting **Assigned profiles**.

- - Click this button to open the edit dialog of the corresponding rule setting.
- - After clicking this icon the respective rule setting is reset to its default value.
- **Undo** button - Click this button to undo the changes made to a rule.

Rule settings

For each rule you can specify the following settings:

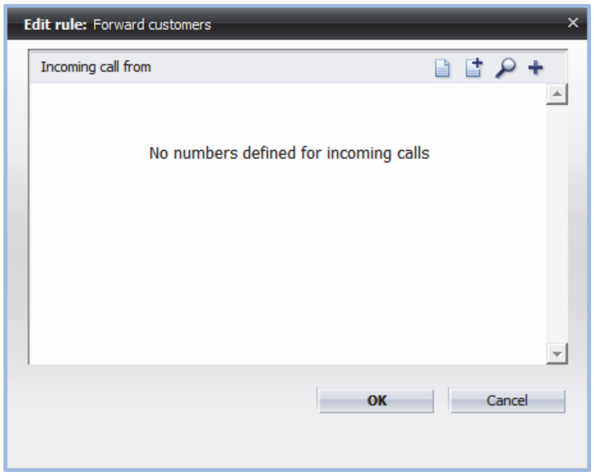
- **If Call from**
- **If date/time**
- **If my status is**
- **Action**
- **Assigned profiles**

Click or simply the corresponding line to open a dialog for each of these settings where you can perform the corresponding rule setting.

6.3.2.1 If call from

Use this setting to determine for which callers the rule shall apply. This setting allows you to link a list of persons or individual person entries to a rule.

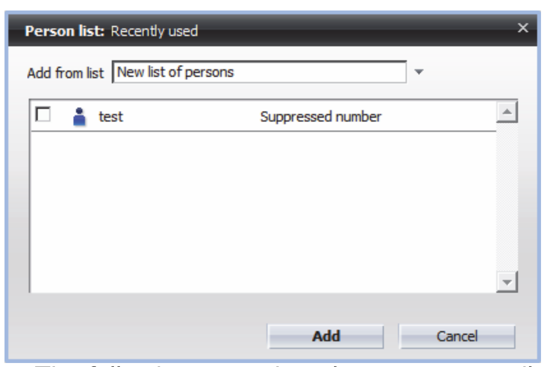
In the lower section of the **New/edit** tab, click on the icon of the **If call from** entry or on the entry itself to open the following dialog:



This dialog displays a list of all callers for which the respective rule is to apply.

The dialog allows you to access the following features:

- - Click this button to add one or more persons from an existing list of persons to the rule. The following dialog opens:



  The following operating elements are available in this dialog:

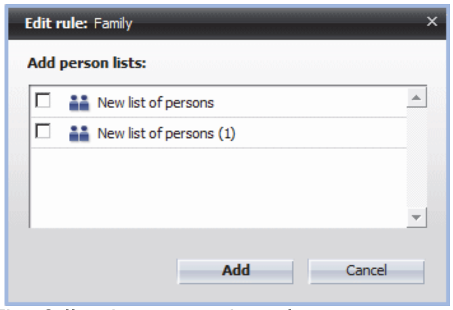
  – Add from list - This combo box provides a list of all available lists of persons.

  – Combo box - To select the person entries

  – Add - Click this button to add the selected persons to the rule and close the dialog.

– Cancel - Click this button to close the dialog and dismiss the settings made.

- - Click this button to assign an already defined list of persons to the rule. The following dialog opens:



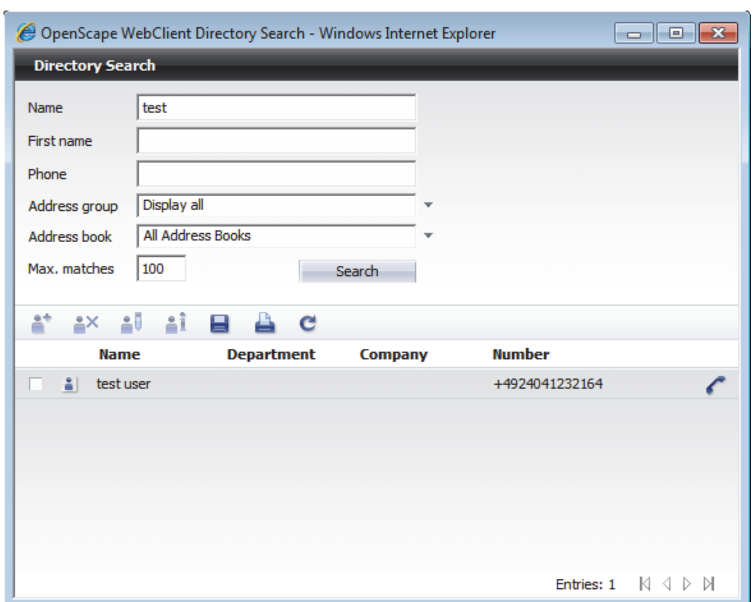
The following operating elements are available in this dialog:

– Combo box - To select the person entries

– Add - Click this button to add the selected persons to the rule and close the dialog.

– Cancel - Click this button to close the dialog and dismiss the settings made.

- - Click this button to search the configured directories for a specific person and add him/her subsequently to the rule. The following dialog opens:



Enter the desired search criteria in the following input fields:

– Name - Find a person by his/her last name

– First name - Find a person by his/her first name

– Phone - Find a person by his/her phone number

– Address group - If you have grouped your contacts in address groups, you can enter here the address group that contains the person you are looking for.

– Address book - Specify here the address book in which you want to search.
– Max. matches - Specify here the maximum number of search hits to be displayed in the search hit list.

The following icons show whether a contact has been found in an external directory, a global or a private contact list:

	The contact information was found in an external directory.
	The contact information originates from the global contact directory of the OpenScape UC Application.
Empty	The contact information originates from your private OpenScape UC Application address book.

The following operating elements are available in this dialog:

– - Click this icon to integrate a selected user from the search hits list in your OpenScape UC Application contact directory. The Add entry to contact list dialog opens; it contains the existing contact data. You can complete the data or simply add the contact to your contact list by clicking the **OK** button.

> ***NOTICE:*** This function is not permitted for selected search hits from your private OpenScape UC Application address book.

– - Click this button to delete a found contact coming from your private OpenScape UC Application contact list.

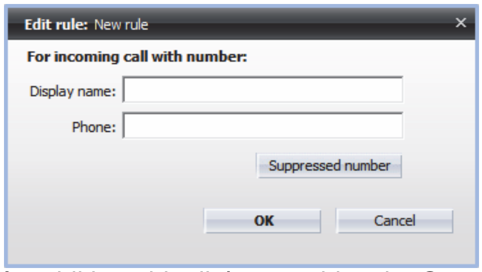
> ***NOTICE:*** This function is not permitted for selected search hits from a directory.

– - Click this button to delete a found contact coming from your private OpenScape UC Application contact list. The **Change entry in the contact list** dialog opens with the already existing user data. You can make the desired changes.

> ***NOTICE:*** This function is not permitted for selected search hits from a directory.

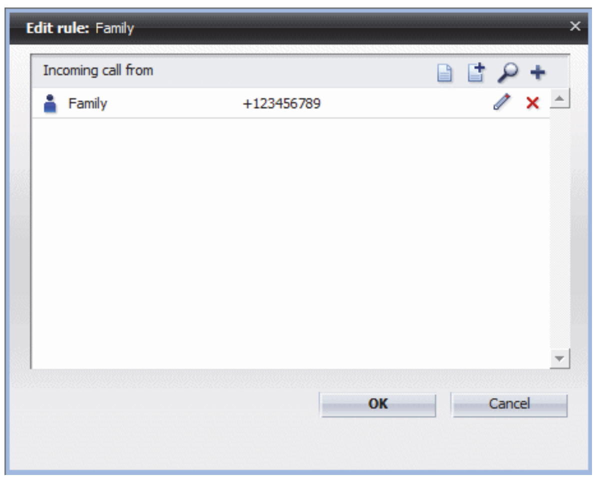
– - Click this button to view the existing information for a user you have been looking for. It is displayed in the opened **Lookup person** dialog.
– - Click this button to save the contact entries found locally on your computer.
– - Click this button to print the contact entries found in tabular form.
– - Click this button to reset or delete all search criteria entered.

- - Click this button to define person entries and add them directly to the rule. A dialog opens for you to specify a **Display name** and a **Phone** number for a new person.

  In addition, this dialog provides the **Suppressed number** button. It lets you define that the rule applies for callers whose phone number has not been transmitted also.

After having assigned a person and a list of persons to the rule, the dialog may look like this:



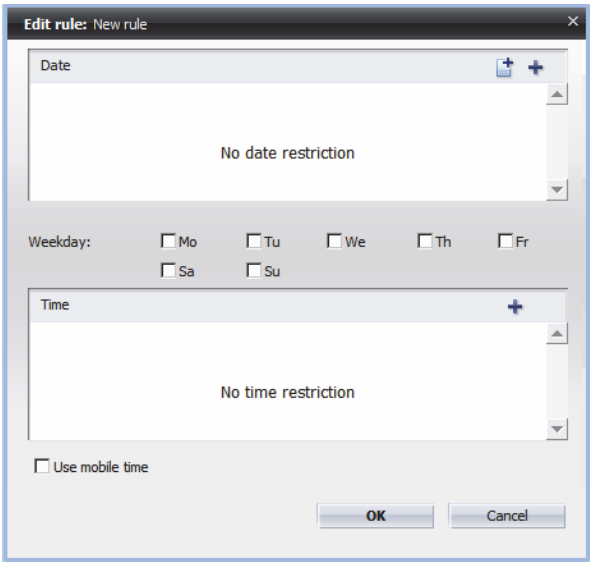
You can apply the following actions to a person entry:

- - Click this button to change the date for the existing person entry.
- - Click this button to remove the corresponding person entry from the list of callers for this rule. The person entry will be deleted from the list for the rule setting **If call from**, but will stay in the list of persons **Recently used** defined by default, so that it can be reused, if required.
- - Click this button to remove a list of persons assigned to the rule from the list.

6.3.2.2 If Date/Time

Use this setting to specify for which period, on which weekdays and at which time the rule is to apply. This setting allows you to link a date list or individual date information to a rule.

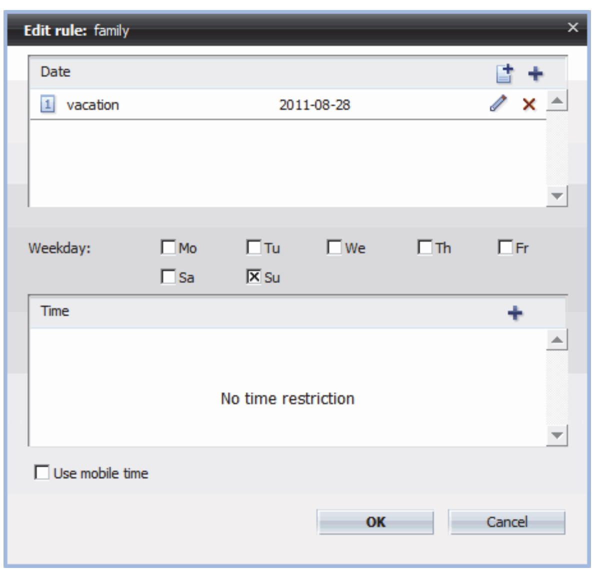
In the lower section of the **New/edit** tab, click on the icon of the **If date/time** entry or on the entry itself to open the following dialog:



The dialog is divided into the following sections:

- **Date -** In this section, define in which period the rule is to apply, for example 26 June to 12 August.
- **Weekday -** In this section, define the weekdays on which the rule is to apply within the specified time range, for example only from Monday to Friday.
- **Time -** In this section, configure at which time the rule is to apply, for example from 3:00 p.m. to 4:00 p.m.

The settings shown in the following dialog as an example mean that the current forwarding rule is to apply from 26 June to 12 August, but only from Monday to Friday between 3:00 p.m. and 4:00 p.m.



The following operating elements are available in this dialog:

- **Use mobile time -** Activate this check box to determine that the rule interpreter may have to consider time zone differences when applying this rule. This is for example useful when you are in another time zone and would like to work with the OpenScape UC Application client from there.

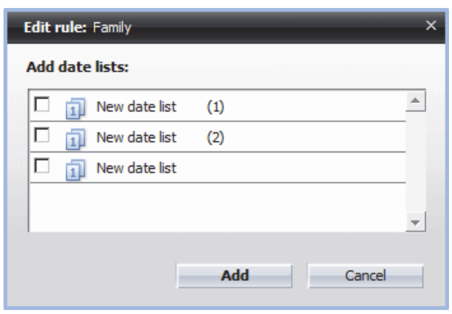
> ***NOTICE:*** Make sure that you have set the correct time zone in the main menu **menu > General ... > Common tab > Appearance tab** under **Mobile time zone**.

- **OK -** Click this button to save all settings made and close the dialog.
- **Cancel -** Click this button to close the dialog without saving the settings made.

Operating elements in the "Date" section

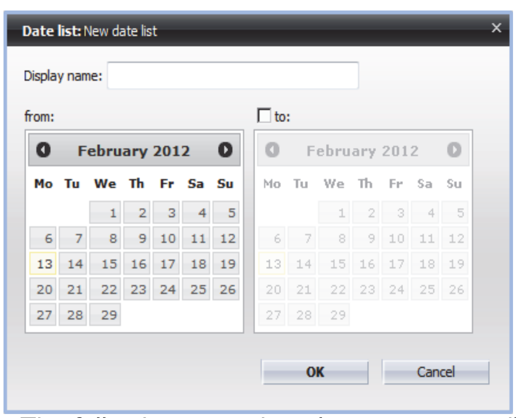
The following operating elements are available in this section:

- - Click this button to add an already defined date list to the rule. The following dialog opens:



  Activate the desired combo boxes and click the **Add** button to apply your settings directly.

- - Click this button to enter date information and to add this information directly to the rule. The following dialog opens:



  The following operating elements are available for setting the date:

  – **Display name - Enter an expressive name for the date entry in this input field.**

- **from** - In this calendar, the current date is marked by a light blue rectangle by default. Click on the desired date in this calendar to define the start date for the date list or rule. It is marked by a dark blue rectangle and appears next to the **from** label.
- **to -** By default, this combo box is not activated and the calendar data in this section are hidden. Activate this check box to show this calendar. Select the desired date in this calendar to define the end date for the date list or rule. It is marked by a dark blue rectangle in the calendar and appears next to the **to** label.

Operating elements in the **from**/**to** calendar sections:

- - Click this button to move one month back.
- - Click this button to move one month forward.
- - Click this button to return to the current month.
- - Click this button to move one year back.
- - Click this button to move one year forward.

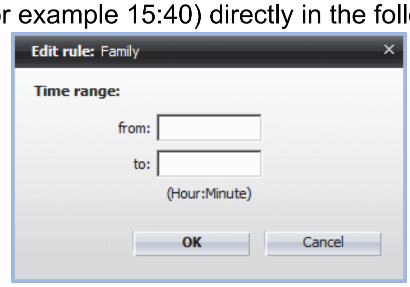
• - Click this button to modify an already defined date entry.

• - Click this button to remove a date entry from the rule.

Operating elements in the "Time" section

The following operating elements are available in this section:

• - Click this button to enter the desired time in the format `hour:minutes` (for example 15:40) directly in the following dialog.



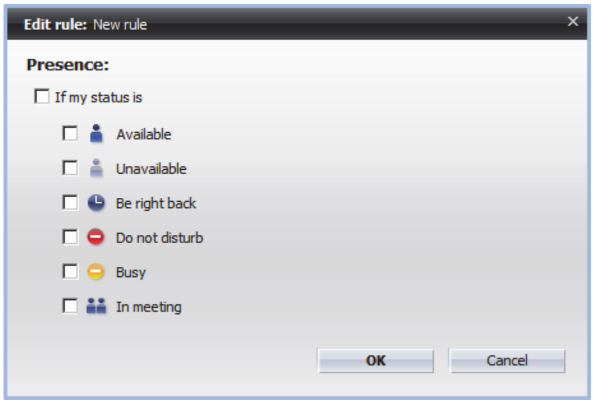
• - Click this button to modify an already defined time.

• - Click this button to remove an already defined time.

6.3.2.3 If my status is

Use this setting to specify for which of your personal presence statuses a rule should apply.

In the lower section of the **New/edit** tab, click on the icon of the **If my status is** entry or on the entry itself to open the following dialog:



The following operating elements are available in this dialog:

- **If my status is** - This check box is automatically activated if at least one presence status is set.
- Combo box to select the presence status as a criterion for a rule. The following table provides an overview of the available presence statuses and their meanings:

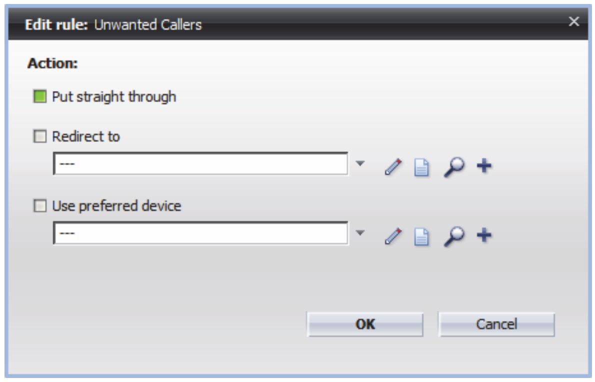
Status	Description
	Signal for the other OpenScape UC Application users that you can be reached at your workstation.
	Signal for the other OpenScape UC Application users that you cannot be reached at your workstation.
	Signal for the other OpenScape UC Application users that you can be reached at your workstation but do not wish to be disturbed.
	Signal for the other OpenScape UC Application users that you have left your workstation for a short period.
	Signal for the other OpenScape UC Application users that you can be reached at your workstation but only want to be disturbed in urgent cases.
	Signal for the other OpenScape UC Application users that you are currently in a meeting and cannot be reached.

- **OK -** Click this button to save all settings made and close the dialog.
- **Cancel -** Click this button to close the dialog and dismiss the settings made.

6.3.2.4 Action

Use this setting to determine the person to receive forwarded calls when the rule is applied.

In the lower section of the **New/edit** tab, click on the icon of the **Action** entry or on the entry itself to open the following dialog:

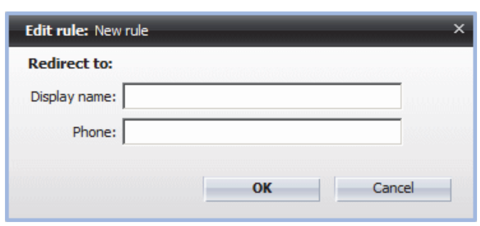


The dialog allows you to access the following features:

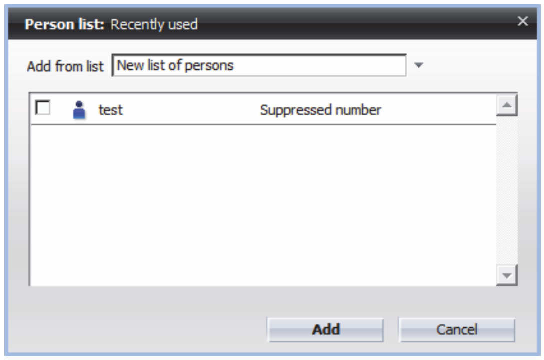
- **Put straight through** - With this option being active (), all incoming calls are put through to the currently set device from your device list.
- **Redirect to** - Activate this combo box () to configure the device or person to direct your incoming calls to. The calling subscriber sees the phone number of the device to which the call has been routed.
  You can perform this setting by one of the following actions:
  – - A click on the small triangle opens a selection list of the devices you have added to your preferred-device list or used as forwarding destination within a rule profile. Select your forwarding destination in there.

  IMPORTANT: All devices available in this selection list are also listed in the bottom section of the **Lists of persons** tab and can be removed from the selection list only via this tab (×).

  – - Click this button to modify the name and the phone number for an already defined forwarding destination in the following dialog.

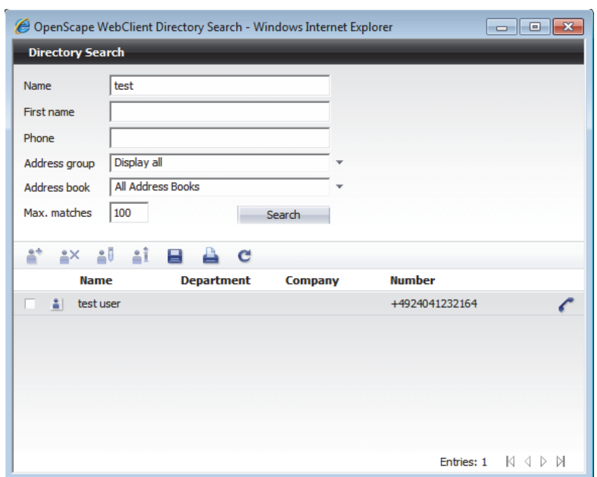


– - Click this button to add one or more persons from an existing list of persons to the rule as forwarding destination. The following dialog opens:



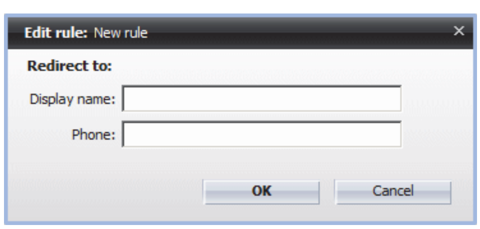
Activate the corresponding check box and click the **Add** button to add the selected person to the rule as forwarding destination.

– - Click this button to search the configured directories for a determined person and add him/her subsequently to the rule as forwarding destination as well as to the **Forwarding destinations** list. The following dialog opens:



The search hit is then copied and becomes directly the forwarding destination for the rule and is added automatically to the list of forwarding destinations.

– - A click on this button lets you define a new forwarding destination directly. The following dialog opens, which allows you to define a display name and a phone number for the forwarding destination.



- **Use preferred device** - Activate this check box ( ) to set the forwarding destination for incoming calls in such a way that the calling subscriber sees your *one-number service* number and not the phone number to which the call has been routed.

 > ***NOTICE:*** You can perform this setting by using one of the actions described for the **Redirect to** option.

 A click on the small triangle opens a selection list of the devices you have added to your preferred-device list or used as forwarding destination within a rule profile. In addition, you can select the device your ONS number has been assigned to from this list. This device is always the top item in the selection list.

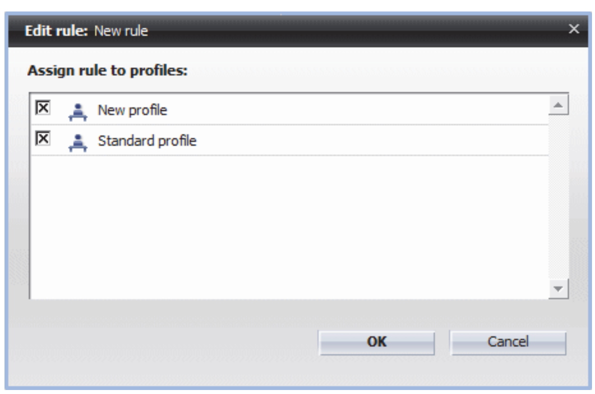
 > ***IMPORTANT:*** All devices available in this selection list (except for the ONS device) are also listed in the bottom section of the **Lists of persons** tab and can be removed from the selection list only via this tab (×).

- **OK -** Click this button to save all settings made and close the dialog.
- **Cancel -** Click this button to close the dialog without saving the settings made.

6.3.2.5 Assigned Profiles

Use this setting to assign the rule you are currently editing to the desired profile. This makes the rule executable at all. The profile must have been already defined. A profile entered in boldface is currently active. Multiple profiles can be assigned to a rule.

In the lower section of the **New/edit** tab, click on the icon of the **Assigned profiles** entry or on the entry itself to open the following dialog:



The following operating elements are available in this dialog:

- You assign a profile to a rule by activating the check box associated to that profile.

- **OK -** Click this button to save all settings made and close the dialog.
- **Cancel -** Click this button to close the dialog without saving the settings made.

6.3.2.6 How to Create a new Rule

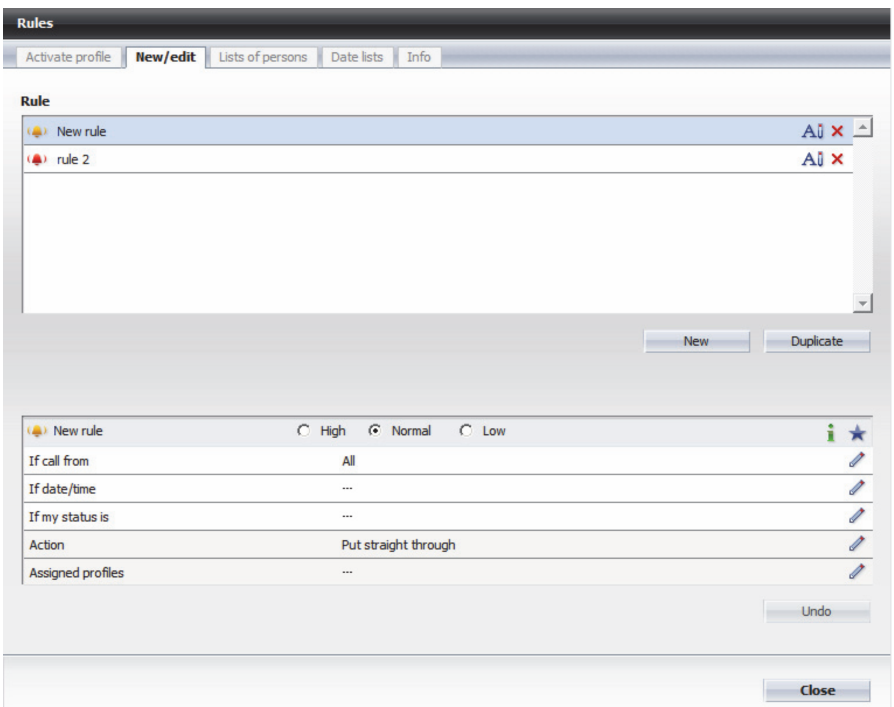
This section describes the steps for creating a new call rule and for specifying your settings. The entries you see in the figures are examples. The settings can be performed as described in the example scenarios. But you can also customize the settings.

How to create a new rule:

Step by Step

1) Open the **Rules** dialog via the **main menu > menu > Rules ...**.

2) Switch to the **New/edit** tab.



3) Click the **New** button.

In the **Rule** section, a new rule named **New rule** is displayed.

4) Click the **New rule** label.

The rule name is represented as input field.

5) Enter the desired name for the new rule and push the **return key** on your keyboard.

The rule name should now reflect your change.

6) Configure the newly created rule.

a) Activate one of the radio buttons **High**, **Normal** or **Low** to define the priority group for the rule.

Your setting will be applied and saved automatically. The priority group of the new rule is also adapted automatically in the **Rule** section.

b) Click **If call from** to define one or more phone numbers for incoming calls.

c) Click **If date/time** to define the date and the time for which the rule is to apply.

d) Click **If my status is** to set the dependency of the rule on your presence status.

e) Click on **Action** to define whether the incoming call from the phone number set under **If call from** is to be put through or forwarded.

f) Click on **Assigned profiles** to assign the rule to one or more already defined profiles.

The new rule has been created and configured.

6.3.2.7 How to Specify Rule Priorities

This section describes the steps to define the priority of a new call rule within a profile. Each rule is assigned to a priority group. The priority groups are **High**, **Normal** and **Low**. The rules of the **High** priority group are always processed first. Within a profile the rules of a priority group are also prioritized against each other and are processed from top to bottom. The priority groups are specified on the **New/edit** tab and the priorities within a profile are defined on the **Activate profile** tab.

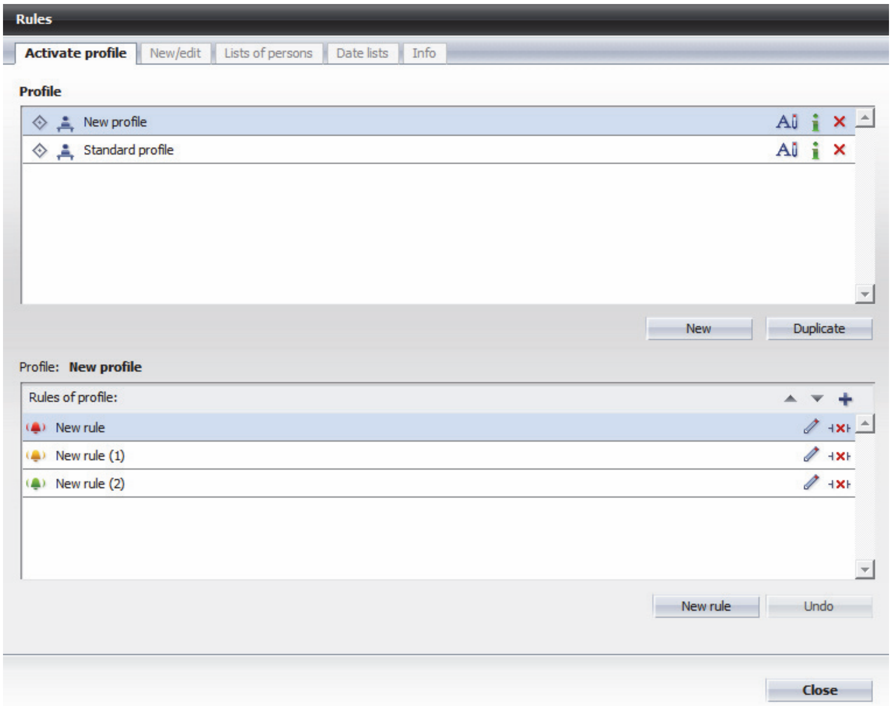
Prerequisites

- You have created at least one profile.
- Your have assigned at least two rules of the same priority group (**High**, **Normal** or **Low**) to this rule profile.

Step by Step

1) Open the Rules dialog via the **main menu > menu > Rules ...**.

2) Switch to the **Activate profile** tab.



3) Select the profile that you would like to define rule priorities for.

All rules linked to this profile are displayed in the Rules of profile field.

4) If several rules of the same priority group are assigned to the rule profile you have selected, select one of the rules the priority of which you would like to change in the priority group.

5) Click on ▽ or △ to move the rule up or down in the list.

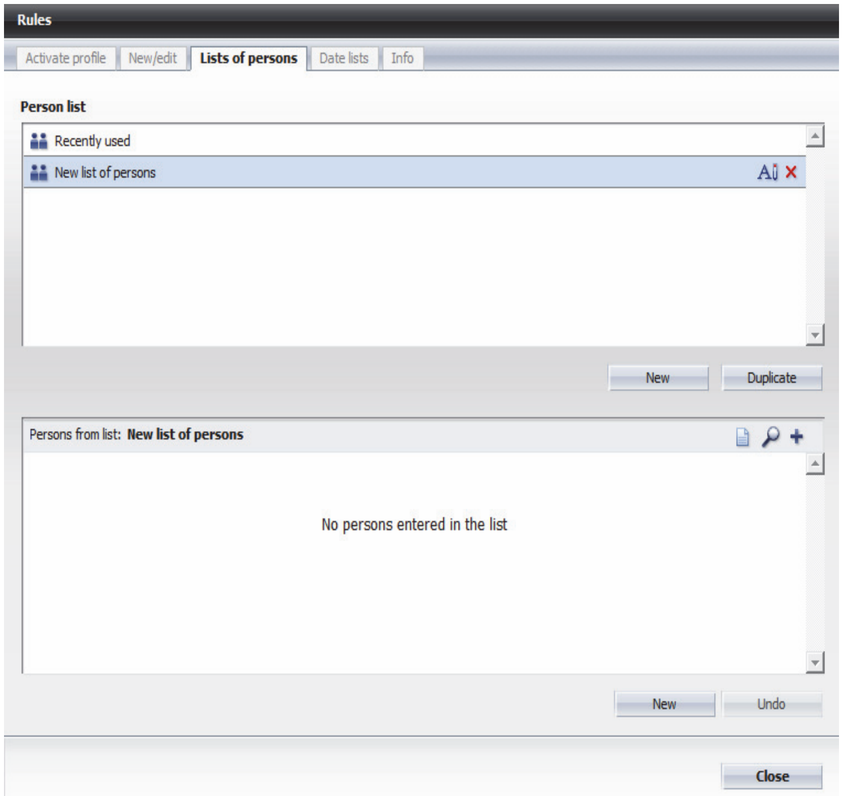
By moving the rule up, its priority increases within the group and the rule will be processed earlier.

6.3.3 Lists of persons Tab

You can use this tab to manage lists of persons. You can link a list of persons to a rule via the **If call from** and **Action** options on the **New/edit** tab. Only then it will be considered by the rule interpreter. In this way you create rules that route calls from specific subscribers to the device you have defined for this purpose.

Invoking the dialog

Select **menu > Rules ...** in the main menu. The **Rules** configuration dialog opens. Switch to the **Lists of persons** tab. As long as you do not change anything, this tab looks as follows by default:

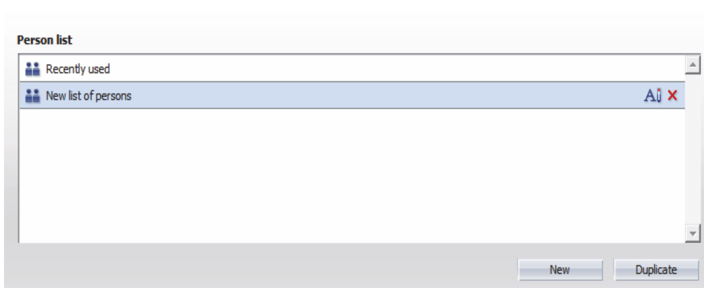


The **List of persons** tab is divided into two sections:

- **List of persons** - All configured lists of persons are listed here.
- **Persons from list:** - All person entries assigned to a list of persons selected in the **List of persons** section are displayed here.

Controls in the List of persons section

This section may look like this:



By default, this section features the following two lists of persons:

- **Recently used** - The following devices or persons are automatically integrated in this list of persons:

- All devices or persons that you have newly integrated in one of your lists of persons.
- The phone numbers you have defined for the **If call from** rule setting on the **New/edit** tab.

- **Forwarding destinations** - In this list of persons, all devices or persons you have defined as forwarding destinations for the **Action** rule setting on the **New/edit** tab are integrated automatically.

> ***NOTICE:*** You can only edit the predefined lists of persons **Recently used** and **Forwarding destinations**, i. e. add new persons to the lists, delete persons from the lists and modify existing person's data (for example phone number). You cannot delete the two lists of persons!

The following operating elements are available in the **List of persons** section:

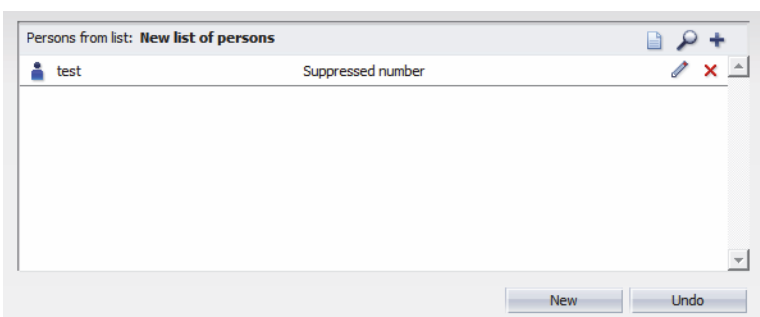
- - Click this button to modify the name of a list of persons.

> ***NOTICE:*** You can also directly click the name of the list of persons list to rename it.

- - Click this button to remove a list of persons from the list.
- **New** button - Click this button to create a new list of persons.
- **Duplicate** button - With a click on the **Duplicate** button you can create a new list of persons by duplicating an already existing list of persons.

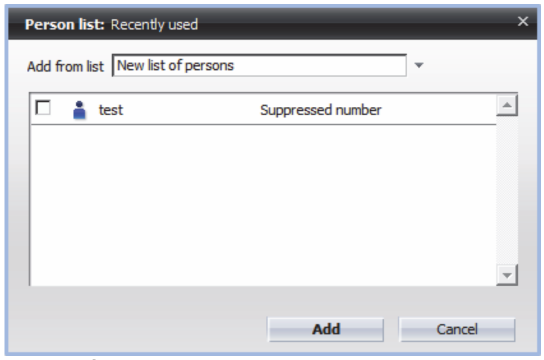
Controls in the Persons from list section

This section may look like this:



The following operating elements are available in the **Persons from list** section:

- - Click this button to integrate specific persons from already created or existing lists of persons in the current list of persons. The following dialog opens:

  The following operating elements are available in this dialog:

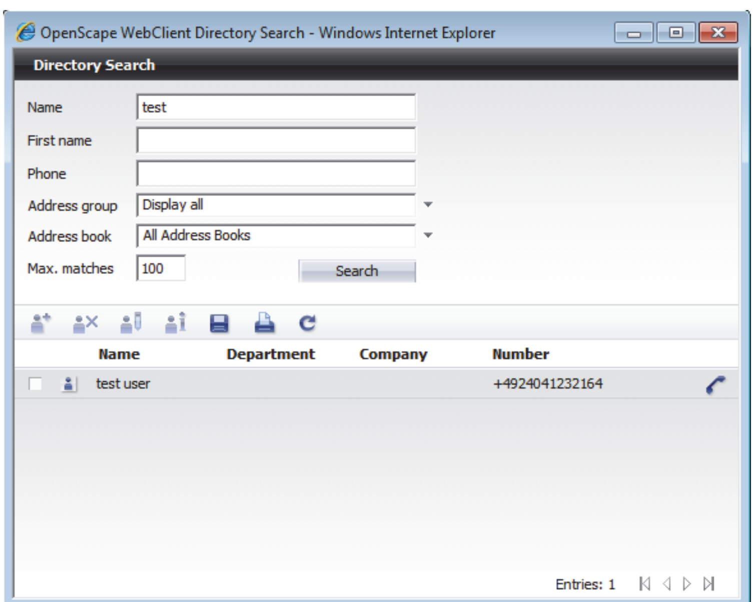
  – **Add from list** - This combo box provides a list of all available lists of persons.

  – Check box to select the person entries

  – **Add** - Click this button to add the selected persons to the list of persons and close the dialog.

  – **Cancel** - Click this button to close the dialog and dismiss the settings made.

- - Click this button to search the configured directories for a specific person and add him/her subsequently to the current list of persons. The following dialog opens:

  Enter the desired search criteria in the following input fields:

Name	Find a person by his/her last name
First name	Find a person by his/her first name
Telephone	Find a person by his/her phone number
Address group	If you have grouped your contacts in address groups, you can enter here the address group that contains the person you are looking for.
Address book	Specify here the address book you wish to search.
Max. matches	Specify here the maximum number of hits to be displayed in the search hit list.

The following icons show whether a contact has been found in an external directory, a global or a private contact list:

	The contact information was found in an external directory.
	The contact information originates from the global contact directory of the OpenScape UC Application.
Empty	The contact information originates from your contact list.

The following operating elements are available in this dialog:

– - Click this button to integrate a selected user from the search hits list in your contact directory. The Add entry to contact list dialog opens; it contains the existing contact data. You can complete the data or simply add the contact to your contact list by clicking the **OK** button.

> ***NOTICE:*** This function is not permitted for selected search hits from your private address book.

– - Click this button to delete a found contact coming from your private contact list.

> ***NOTICE:*** This function is not permitted for selected search hits from a directory.

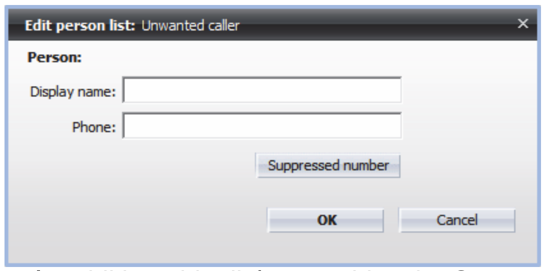
– - Click this button to edit a found contact coming from your private contact list. The Change entry in the contact list dialog opens with the already existing user data. You can now perform the desired changes.

> ***NOTICE:*** This function is not permitted for selected search hits from a directory.

– - Click this button to view the existing information for a user you have been looking for. It is displayed in the opened Lookup person dialog.

– - Click this button to save the contact entries found locally on your computer.

  - – - Click this button to print the contact entries found in tabular form.
  - – - Click this button to reset or delete all search criteria entered.
  - – - Click this button at the bottom margin of the dialog to display the top of the search hits list.
  - – - Click this button at the bottom margin of the dialog to display the bottom of the search hits list.
  - – - Click this button to display the previous search hits in the list.
  - – - Click this button to display the next search hits in the list.
- - Click this button to define person entries and add them directly to the list of persons. The following dialog opens, which allows you to define a display name and a phone number for the forwarding destination.

  In addition, this dialog provides the **Suppressed number** button. It lets you determine that all callers whose phone number has not been transmitted are assigned to the selected list of persons.
- - Click this button to modify an existing person entry.
- - Click this button to remove a person entry from the list of persons.
- **New** - Click this button to create a new person entry.
- **Undo** - Click this button to undo the changes made to a person entry.

6.3.3.1 How to Create a new List of Persons

This section explains how to create a new list of persons. With the help of lists of persons, callers are grouped and linked to a rule. If you wish to link a caller to a rule, the caller must simply be added to a list of persons. The rule itself need not be modified.

Execute the following steps to create a new list of persons:

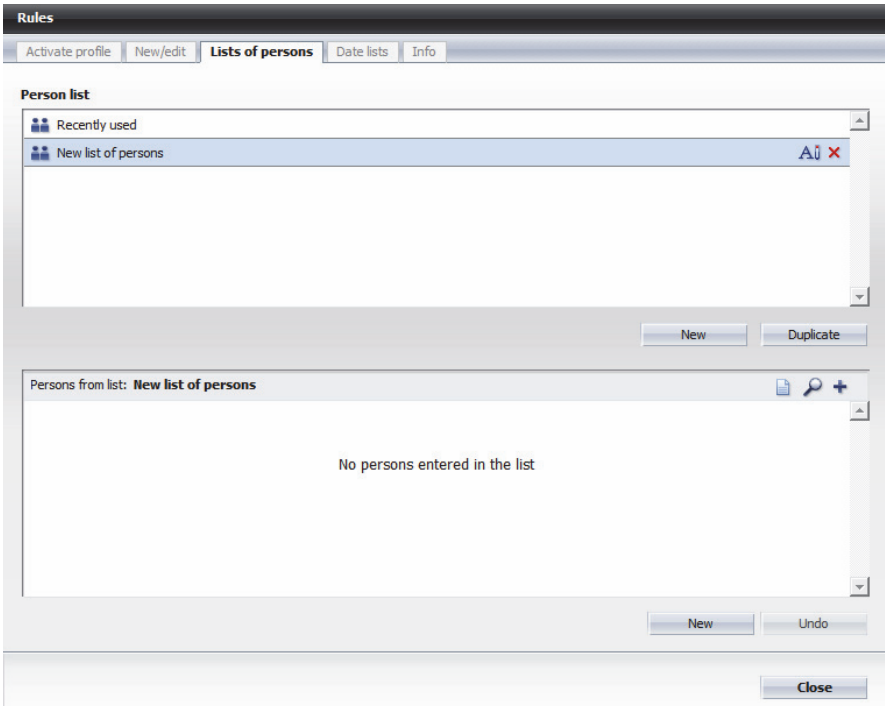
Step by Step

1) Click on **menu** in the main menu and select the **Rules ...** option.

The **Rules** dialog opens.

2) Switch to the **Lists of persons** tab.

The following window (example) is displayed.



3) Click the **New** button under the **List of persons** section.

A new list of persons named **New list of persons** is displayed.

4) Click the name **New list of persons** to modify the name of the list of persons.

The list of persons name is represented as input field.

5) Enter the new name for the list of persons and press **Enter** on your keyboard.

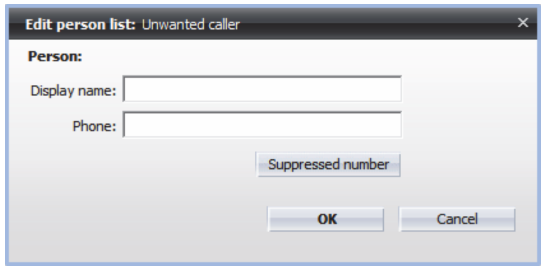
The name of the list of persons should now reflect your change: It does not contain any person entries yet.

6) Add an entry to the list of persons.

Execute the following steps for all persons you wish to add to the list:

a) Click the **New** button in the bottom section.

The following input dialog opens.



b) Specify the name of the desired person in the **Display name** input field.

c) In the **Phone** input field, enter the phone number of that person.

d) Click on **OK**.

The input dialog closes. The new person entry has been integrated in the list of persons.

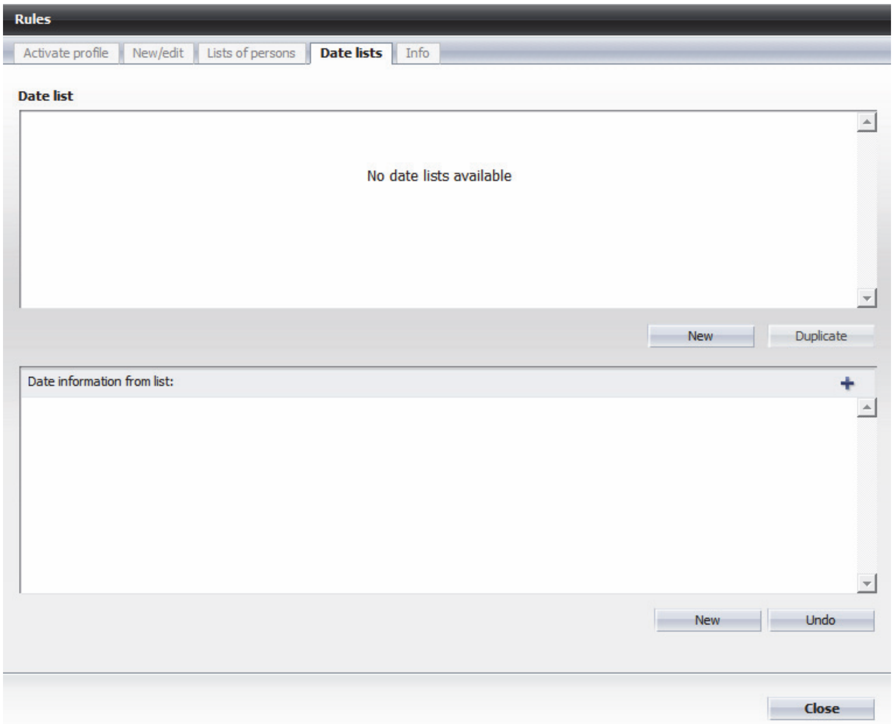
The new list of persons has been created and contains the desired person entries. However, it cannot be used by the rule interpreter as it has not been assigned to a rule yet.

6.3.4 Date lists Tab

You can use this tab to manage date lists. In a date list you can specify days and time periods during which a rule should apply, for example, 04/01 to 10/01, 31/08 or 01/09 to 15/09. You can link a date list to a rule via the **If date/time** option on the **New/edit** tab. Only then it will be considered by the rule interpreter.

Invoking the dialog

Select **menu > Rules ...** in the main menu. The configuration dialog **Rules** opens. Switch to the **Date lists** tab. As long as you do not change anything, this tab looks as follows by default.

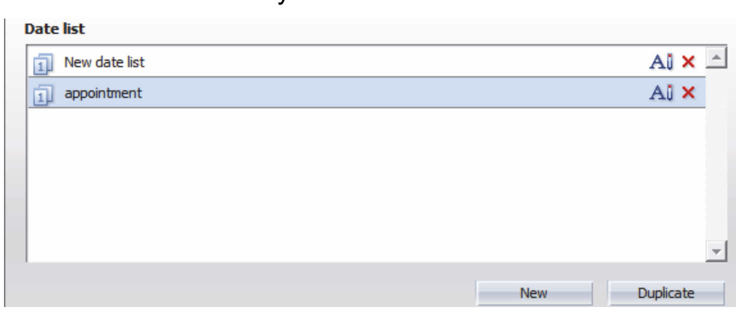


The **Date lists** tab is divided into two sections:

- **Date list** - All configured date lists are listed here.
- **Date information from list:** - All date information assigned to a date list selected in the **Date list** section is displayed here.

Controls in the Date list section

This section may look like this:



The following operating elements are available in the **Date list** section:

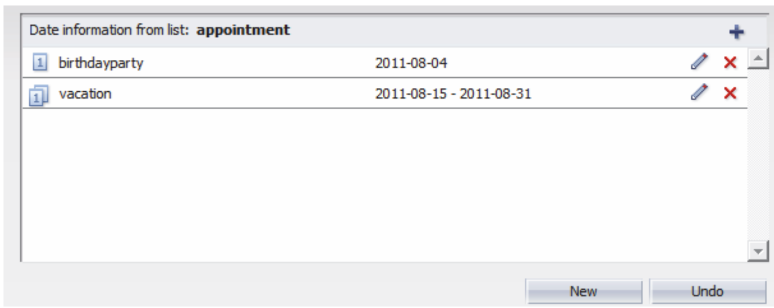
- - Click this button to modify the name of a date list.

  NOTICE: You can also directly click the name of the date list to rename it.

- - Click this button to remove a date list from the list.
- **New** - Click this button to create a new date list.
- **Duplicate** - With a click on the **Duplicate** button, you can create a new date list by duplicating an already existing date list.

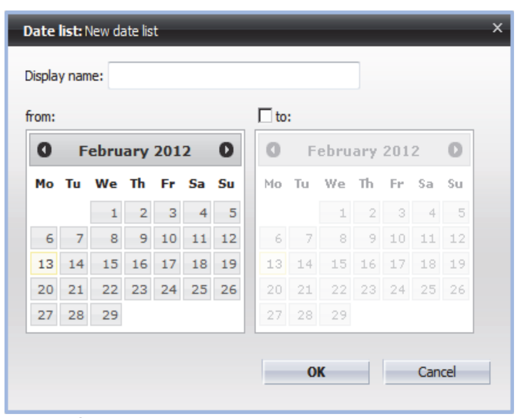
Controls in the Date information from list section

This section may look like this:



The following operating elements are available in the **Date information from list** section:

- - Click this button to enter date information and add it directly to the list. The following dialog opens:

  The following operating elements are available to set the date:

  – Display name - Enter an expressive name for the date entry in this input field.

  – from - In this calendar, the current date is marked by a light blue rectangle by default. Click on the desired date in this calendar to define the start date for the date list or rule. It is marked by a dark blue rectangle and appears next to the **from** label.

- to - This check box is disabled by default and the calendar data in this section is hidden. Activate this check box to show this calendar. Select the desired date in this calendar to define the end date for the date list or rule. It is marked by a dark blue rectangle in the calendar and appears next to the **to** label.
- - Move one month back
- - Move one month forward
- - Return to the current month
- - Move one year back
- - Move one year forward

- - Click this button to edit the configured date.
- - Click this button to edit the defined time range.
- - Click this button to modify an existing date entry.
- × - Click this button to remove a date entry from the date list.
- **New** - Click this button to create a new date entry.
- **Undo** - Click this button to undo the changes made to a date entry.

> ***NOTICE:*** The **Undo** button is inactive until you define a date entry for the selected date list.

6.3.4.1 How to Create a Date List

This section explains how you create a new date list. By using date lists, date information is divided in groups and linked to a rule. If you wish to link a date to a rule, the date must simply be added to a date list. The rule itself need not be modified.

Execute the following steps to create a new data list:

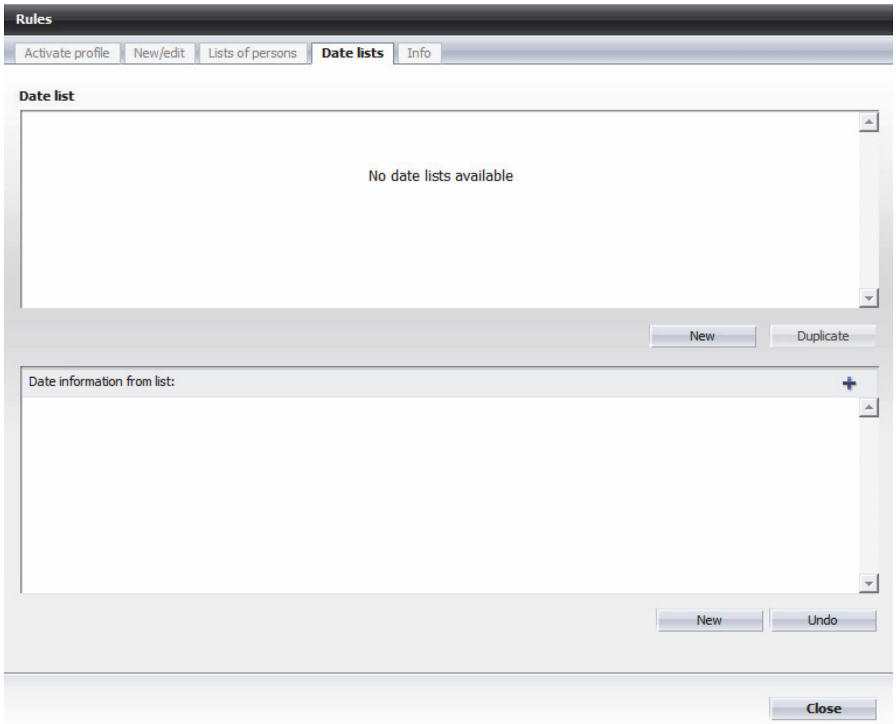
Step by Step

1) Click on **menu** in the main menu and select the **Rules ...** option.

The **Rules** dialog opens.

2) Switch to the **Date lists** tab.

The following window (example) is displayed.



3) Click on the **New** button under the **Date list** section.

A new date list named **New date list** is displayed.

4) Click the name **New date list** to modify the data list name.

The data list name is represented as input field.

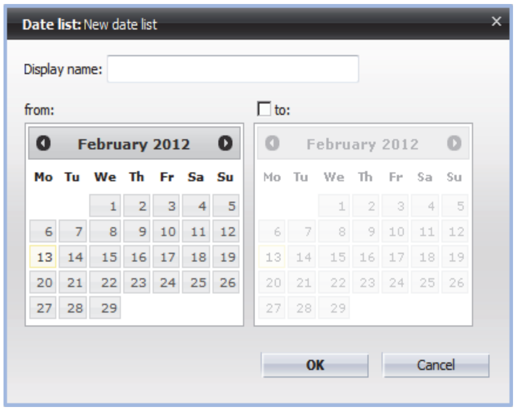
5) Enter a new name for the date list and push the **return key** on your keyboard.

The date list name should now reflect your change. It does not contain any date information yet.

6) Add an entry to the date list.

a) Click the **New** button in the bottom section.

The following input dialog opens.



b) In the **Display name** input field, enter an expressive name for the date information.

c) Select the start date (**from**) in the left month display.

The start date you have defined (**from**) appears above the left calendar.

d) If you would like to define an end date, activate the **to** check box.

The right calendar is displayed.

e) Select the end date (**to**) in the right month display.

The end date (**to**) you have defined appears above the right month display.

f) Click on **OK**.

The input dialog closes. The new date information has been integrated in the date list.

The date list has been created. However, it has not been assigned to a rule yet.

6.3.4.2 How to Assign a Date List to a Rule

A date list is only considered by the rule interpreter tool after being assigned to a rule. This section describes how to assign a rule to a date list.

Prerequisites

- You have defined a date list.
- You have created a rule.

Step by Step

1) Click on **menu** in the main menu and select the **Rules ...** option.

The **Rules** dialog opens.

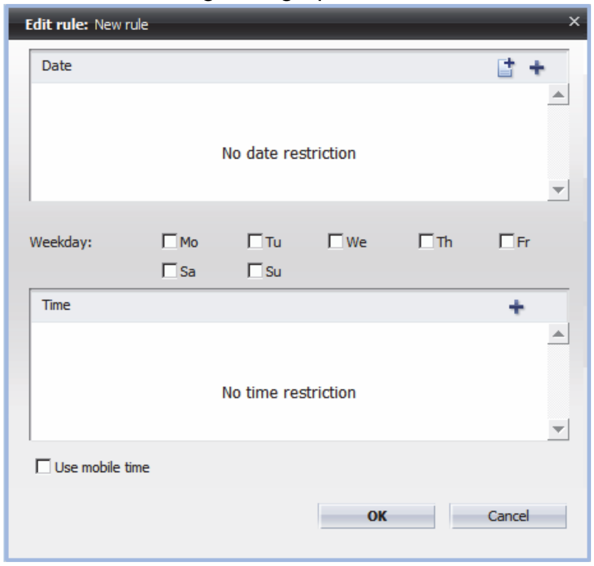
2) Switch to the **New/edit** tab.

3) Select the rule you would like to assign to a date list.

In the bottom area of the tab, the rule settings are displayed.

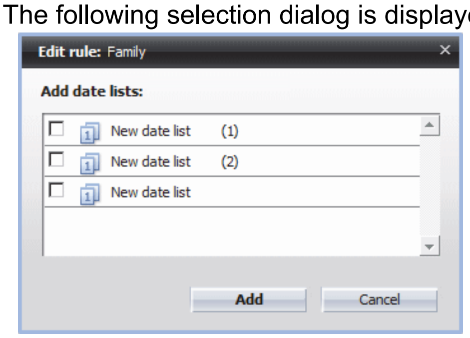
4) Click **If date/time**.

The following dialog opens:



5) Click on in the upper section of the dialog.

The following selection dialog is displayed (example):



6) Select the desired date list.

7) In the selection dialog, click the **Add** button.

The selection dialog closes. The selected date list is displayed in the upper section (**Date**).

8) Click on **OK**.

The dialog closes. The date list is displayed in the **If date/time** line of the rule settings section.

6.3.4.3 How to Define the Time for a Rule

Rules may apply on specific days (defined for example in date lists) and/or on specific days of the week and/or at specific times. This section describes how to set the day of the week and the time for a rule's application.

Prerequisites

- You have already created at least one rule.

Step by Step

1) Click on **menu** in the main menu and select the **Rules ...** option.

The **Rules** dialog opens.

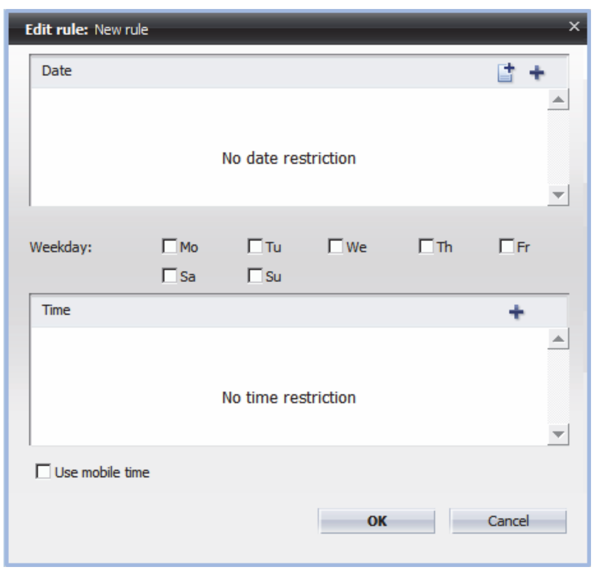
2) Switch to the **New/edit** tab.

3) Select the rule for which you would like to define a day of the week and a time.

In the bottom area of the tab, the rule settings are displayed.

4) Click **If date/time**.

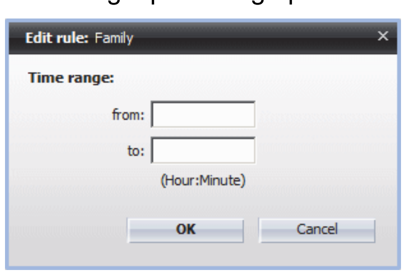
The following dialog opens:



5) Activate the check box(es) of the desired day(s) of the week.

6) Click on + in the **Time** section.

The following input dialog opens.



7) In the **from** input field, enter the desired start time. The valid format for the time input is `hour:minutes` (for example `00:00`).

8) In the **to** input field, enter the desired end time. The valid format for the time input is the same as for the **from** input field.

9) Click on **OK**.

The input dialog closes. The configured time is displayed in the **Time** section of the dialog.

10) Click on **OK**.

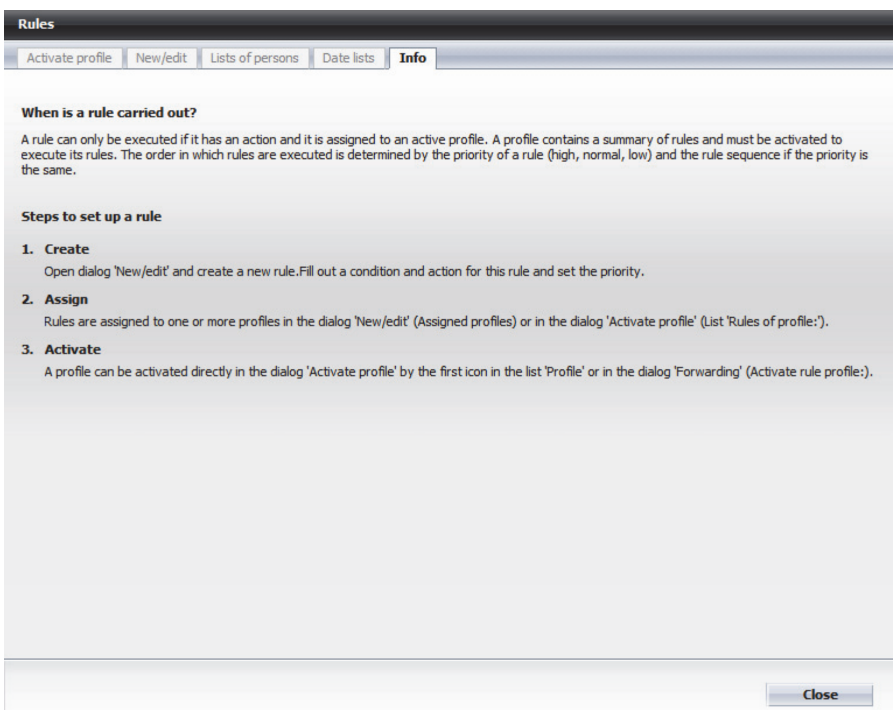
The dialog closes.

The performed settings have been applied and saved. Your time information for the selected rule appears on the **New/edit** tab under **If date/time**.

6.3.5 Info Tab

This tab provides information on general procedures for creating and activating rules and profiles.

You reach the **Info** tab via the **main menu > menu > Rules ...**.



7 Voicemail Settings

After you have invoked the **Voicemail...** option from the **menu**, you can perform settings for the voicemail system.

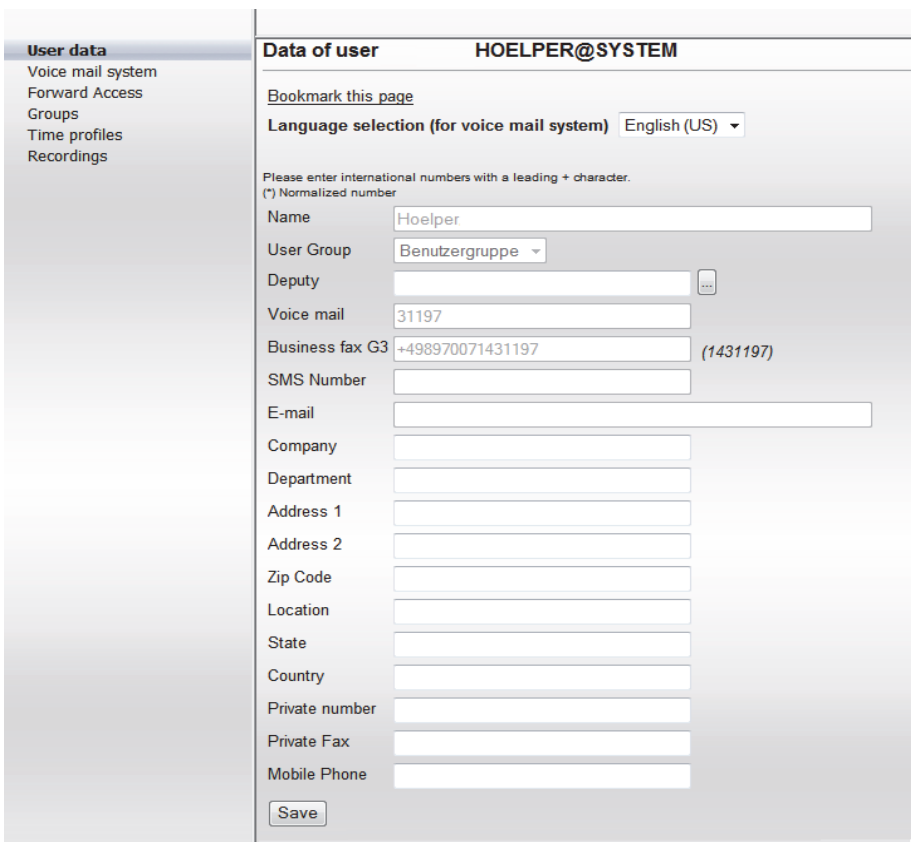
Via the navigation bar on the left-hand margin of the settings dialog you can open the configuration pages for the voicemail system. The following configuration pages are available:

- **User data**
- **Voice mail system**
- **Forward access**
- **Groups**
- **Time profiles**
- **Recordings**

7.1 User Data

On the **Data of user** page you can see information about your user account.

You open this settings page via **menu > Voicemail ... > User data**.



You can select the language for the user interface and for the default greetings of your voicemail box in the **Language selection (for voice mail system)** combo box.

You can modify some of the settings, depending on the system configuration.

- **Deputy**
  Entry or selection of the mailbox deputy.
  If you are absent for a longer period (vacation, business trip, illness, etc.), you can redirect your mailbox to another user (deputy feature).

  > ***NOTICE:*** Messages that have been delivered to your deputy do not appear in you mailbox.

- **Your address data**
  You can complete the data mask with your personal address data if you would like to do so. The following data fields are provided for this purpose: **Company**, **Department**, **Address 1**, **Address 2**, **Zip Code**, **Location**, **Federal State**, **Country**, **Home Number**, **Home Fax** and **Mobile Phone**.

  > ***NOTICE:*** Enter the complete phone number in the fields in which you enter phone numbers yourself (for example private number). Example: `+49892221111` (international prefix, area code without leading zero, extension number).

- **Save**
  A click on **Save** backs up all the selections and entries you have made or the updates of the **User data** page.

7.1.1 How to Configure a Mailbox Deputy

To configure a mailbox deputy proceed as follows:

Step by Step

1) Open the settings page for the user data via **menu > Voicemail > User data**.

2) Click on the button next to the **Deputy** field.

Another window with a list of all users opens.

3) Select a user in this window. Click on the corresponding user ID.

The window closes and the selected name will be entered in the **Deputy** field.

> ***NOTICE:*** If you know the deputy's user ID, you can enter him/her directly in the **Deputy** field.

4) Click the **Save** button.

> ***NOTICE:*** Remove the name from the **Deputy** field to deactivate the mailbox routing.

7.1.2 How to Select a Language (for the Voicemail System)

If you wish to configure a language for the default greetings of your voicemail system that differs from the language of your operating system, proceed as follows:

Step by Step

1) Open the settings page for the user data via **menu > Voicemail > User data**.
2) Click on the **Language selection (for voice mail system)** combo box.

   The list of available languages is displayed.
3) Select the desired language.
4) Click on the **Save** button.

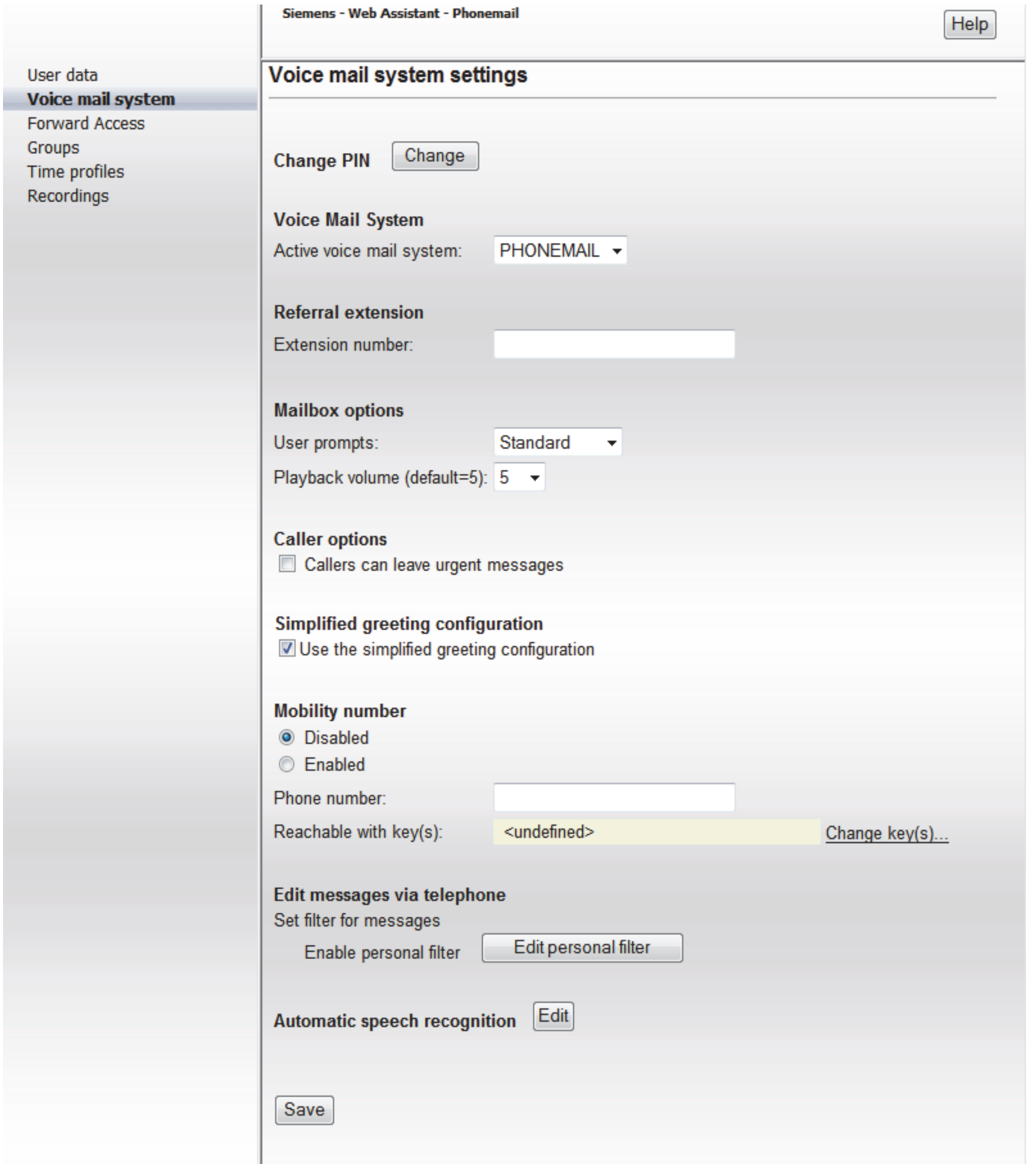
The page is updated and displayed in the set language.

7.2 Voice Mail System

On this page you can make different settings for your personal voice mailbox.

> ***NOTICE:*** Please note that modifications will not become active until you click the **Save** button at the bottom of the page.

You open this settings page via **menu > Voicemail > Voice mail system**.



You can perform the following settings on this page:

- **Change PIN**
  You can change your PIN for voicemail box access. All digits from 0 to 9 can be used. The PIN itself must have at least four digits and must not exceed 23 characters, unless your configuration differs from the standard one.
  It is checked for:
  – Length (too short or too long)
  – Invalid characters (letters or special characters),
  – String of a constant number, such as 444444
  – Ascending or descending number string, such as 12345 or 654321
  – Includes the individual telephone or voicemail box number
  – Contains a vanity number

- PIN was already used at an earlier time
- PIN is the same as the default PIN

- **Voice mail system**
  Since only the voicemail system *Phonemail* is available, selecting another voicemail system is not possible.
- **Referral extension**
  You can enter a direct dialing number to which your calls will be deflected if necessary. The number entered here is used when activating the call forwarding to the referral extension.
  Your deputy may be an OpenScape UC Application user, a user on your PBX, or an external user (you need exchange access to enter an external number for a deputy). If the deputy in an internal subscriber, you can enter the number in short form (that is, as extension number) or in long form (for example 32323 or +49 89 722 32323). Otherwise, enter the number in international format. The phone number may not contain more than twenty-two digits.
  Enter the number of the desired extension without the CO exit code and prefix 0, but include the country code.

> ***NOTICE:*** Use a personal greeting to notify any callers that they can use the key combination 0 > 7 to connect to the configured referral extension.

- **Mailbox options**
  You can define a detailed or short version of the user prompts of your voicemail box and the relative playback volume.
  - Example of a standard greeting: “Select the star button to correct your entry”.
  - Example of a short greeting: “Correct entry with star”.
- **Caller options**
  You can provide callers with the option to mark the message they leave as urgent. If you activate this option, the caller receives another menu after recording his/her message, in which he/she may select the respective option via telephone.
- **Simplified greeting configuration**
  Two time profiles are available for the voicemail system:
  - The time profile for the simplified greeting configuration that is default-set when you log on to the system. The simplified greeting configuration allows using only one greeting per greeting type and working day.
  - The time profile for the enhanced greeting configuration. It enables configuring the greetings of the single greeting types for each working day separately.

- **Mobility number**
  This feature enables you to specify forwardings that the caller can trigger by telephone key entry. Forwarding can be used for both internal and external destinations or to trigger an action, such as switching to another voice mailbox or granting callers callback access (access to their voice mailbox).
  Forwarding can be set up with different variants (actions) with each call forwarded being assigned its own phone key ranging from 0 to 9 as well as * and #. Your voicemail should inform the caller of the appropriate phone key. You must record this information as a separate greeting. If the caller presses the predefined phone key after listening to your greeting, the call is forwarded using the specified action. You can also define various actions for multiple forwarding and make them available to the caller.
  Configured forwarding options and their destination numbers are displayed in the **Phone number** field. The corresponding phone key is displayed under **Reachable with key(s):**. You can quickly enable or disable existing forwardings via the options **Enabled** or **disabled**.
  The **Forward Mode** page provides a forwarding definition.
- **Edit messages via telephone**
  Set filter for messages
  You can set a message playback filter on the telephone so that only specific messages are played upon their retrieval. Messages contained in the server inbox folder are accessed by default.

  > ***NOTICE:*** These filters are not applied to receipt notifications. Receipt notifications are still issued since they have been explicitly demanded.

  Fax or voicemails delivery reports are stored in your voicemail box as e-mail by default. These reports will always be announced, irrespective of e-mail announcement settings. This behavior can be changed in the voicemail system, so that the settings made there for e-mails also apply for delivery reports. If you are unsure about this matter, please consult your system administrator.
- **Automatic speech recognition**
  On this page you can set the voice recognition sensitivity of the *EVO* voicemail system. As a rule, the default values are sufficient.
  Using cell phones the sensitivity may have to be upgraded since cell phone connections are sometimes not free from volume fluctuations.

  > ***NOTICE:*** Further information about the *EVO* voicemail system is provided in the product's user manual.

7.2.1 How to Change the PIN

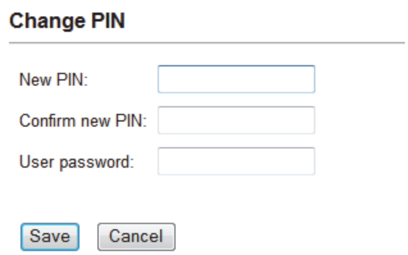
How to change the PIN for accessing your own OpenScape UC Application voicemail box:

Step by Step

1) Open the settings page for the voicemail system via **menu > Voicemail... > Voice mail system**:

2) Click the **Change** button next to **Change PIN**.

   The following window opens.



3) Enter a new PIN in the **New PIN** field and repeat the entry in the **Confirm new PIN** field.

4) In the **User password** field enter your current password that you also use for logging on to the OpenScape Web Client.

5) Click on the **Save** button.

   After your new PIN has passed the system's security check, you receive a modification confirmation.

> ***NOTICE:*** If your new PIN does not comply with the security policy or contains invalid characters, you are prompted to repeat the entry. You can do this via the **Next** button.

6) Click on the **Next** button.

The window closes and the new PIN is immediately valid.

7.2.2 How to Select User Prompts

How to select the user prompt type for your voicemail box and define the relative playback volume:

Step by Step

1) Open the settings page for the voicemail system via **menu > Voicemail... > Voice mail system**:

2) Click in the **User prompts** combo box and select whether to use standard or abbreviated user prompts.

3) Set the **playback volume**. The default setting is level 5.

4) Click on the **Save** button.

   Your modifications are saved.

7.2.3 How to Define Caller Options

How to offer callers the option to label left messages as urgent:

Step by Step

1. Open the settings page for the voicemail system via **menu > Voicemail... > Voice mail system**:
2. In the **Caller options** section select the **Callers can leave urgent messages** option.
3. Click on the **Save** button.

   Your modifications are saved.

7.2.4 How to Activate the Advanced Greeting Configuration

To activate the advanced greeting configuration, proceed as follows:

Step by Step

1. Open the settings page for the voicemail system via **menu > Voicemail... > Voice mail system**:
2. Untick the **Use the simplified greeting configuration** check box.
3. Click on the **Save** button.

   Your modifications are saved.

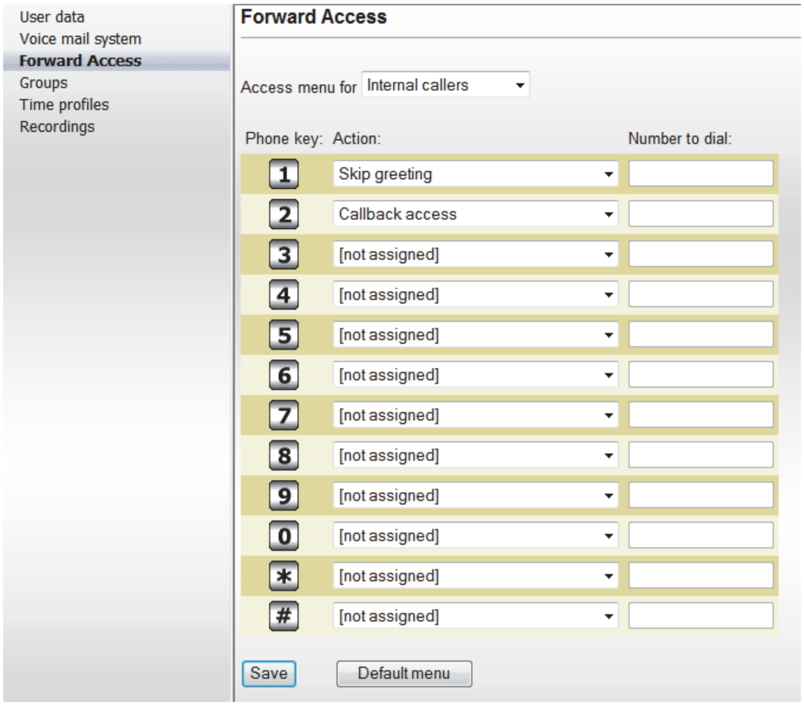
7.2.5 How to Define Call-Forwarding Keys

How to define a key the caller may use for triggering a forwarding:

Step by Step

1. Open the settings page for the voicemail system via **menu > Voicemail... > Voice mail system**:
2. Click the **Change key(s)...** link.

The **Forward Access** setting page opens.



3) In the **Access menu for** combo box, select the cases for which forwarding should apply.

4) Select the respective **action** in the combo boxes.

At the same time the respective key number (**tel. key**) is set.

5) If necessary, enter the desired phone number in the **Number to dial** field.

> ***NOTICE:*** The phone numbers are generally copied from the database. Only for the cases where a forwarding to a freely defined phone number has been configured you must enter this number in the **Number to dial** field.

6) Click on the **Save** button.

Your settings are saved.

NOTICE: Be sure to inform callers about these individual phone key(s) with appropriate greetings.

NOTICE: The **Default menu** button resets the menu to its original appearance. Modifications performed are deleted then.

After the forward mode has been defined, the **Voice mail system** page shows under **Mobility number** the key number for the forwarding to the **mobility number** and the destination number.

7.2.6 How to Set a Personal Message Filter

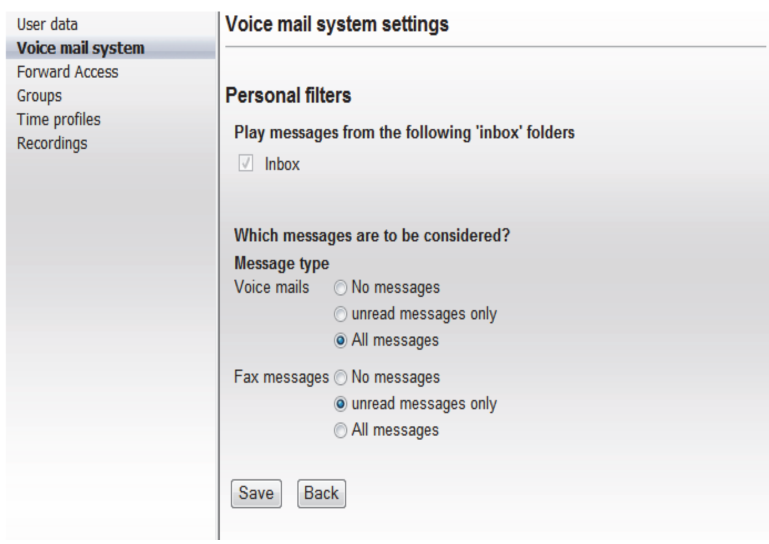
How to set your personal message filter:

Step by Step

1) Open the settings page for the voicemail system via **menu > Voicemail... > Voice mail system**:

2) Click on the **Edit personal filter** button to specify details for the playback filter.

The following page opens:



3) Select an **inbox folder** if necessary.

4) Select a filter option under **Message type**. The **No messages** option locks this message type so that it is not considered for playback.

> ***NOTICE:*** Only message types that exist in the system can be selected. The message type **Voicemail** is always available.

5) Click on the **Save** button at the bottom margin of the page.

Your settings are saved.

7.2.7 How to Set the Speech Recognition Volume

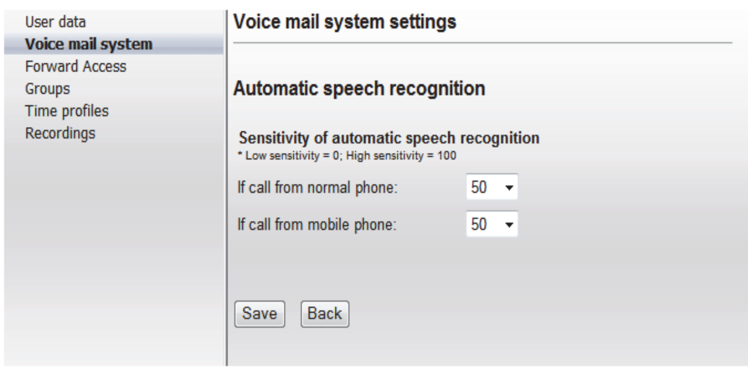
To set the speech recognition volume proceed as follows:

Step by Step

1) Open the settings page for the voicemail system via **menu > Voicemail... > Voice mail system**:

2) Click the **Edit** button next to the **Automatic speech recognition** entry.

The following page opens:



3) Set the volume separately for **If call from normal phone** and **If call from mobile phone** via the two combo boxes.

4) Click on the **Save** button.

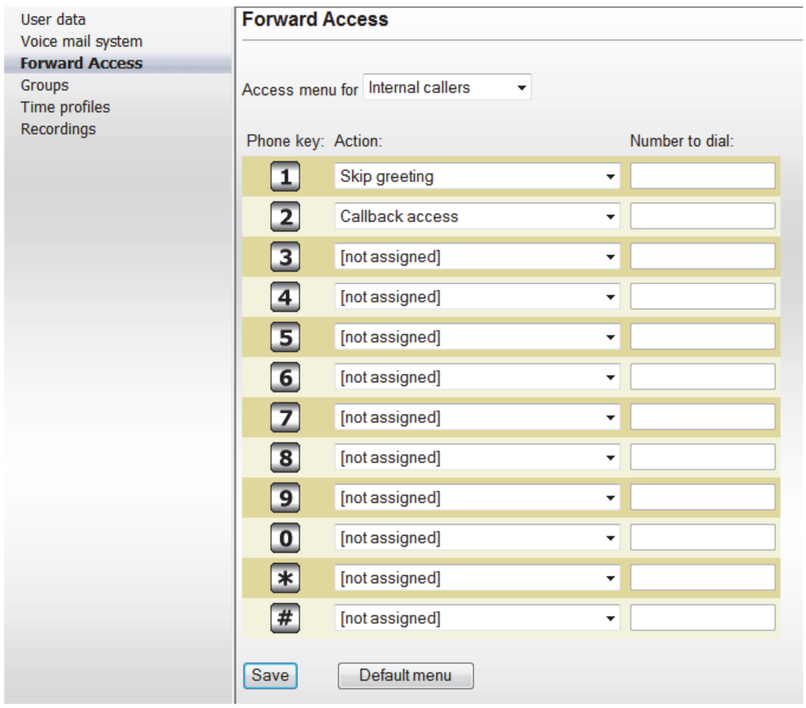
Your settings are saved.

7.3 Forward Access

Specify the different variants (actions) and phone keys for forwarding on the **Forward Access** page. First of all, you can decide which call type you wish to forward, for example, **Internal calls**, **External calls** or **After-hours greeting**. If you select **Alternate greeting**, all incoming calls will be forwarded. In a subsequent step you can determine the forwarding action and the phone key to be pushed by the caller.

> ***NOTICE:*** You can always reach this menu via the *Telephone User Interface (TUI)*, but no options are named by the system. In order to inform the caller about the possible options you need to configure a personal announcement.

You open this setting page via **menu > Voicemail > Forward Access**.



The table below describes the available actions:

Action	Description
Not assigned	This selection disables the corresponding key number.
Hang up	Disconnects the call if the caller presses the relevant phone key.
Callback access (call-back mode)	Allows the caller to access your mailbox quickly (without having to enter the voicemail box number).
Direct access (control mode)	Allows the caller to access your mailbox normally.
Guest access (answer-ing machine mode)	Allows leaving a message. The caller has to enter the required mailbox number.
Mobile phone number	Forwards to a preset mobile phone number
Operator	The operator's phone number is configured in the user group, but it may also be configured in the voicemail profile.

Action	Description
Page the user	The caller pages you by pressing the relevant phone key.
Referral extension	Performs a forwarding to the referral extension you have defined.
Skip greeting	Allows the caller to skip the welcome greeting.
Dial the number	Allows the forwarding of calls to any telephone number. If the caller pushes the corresponding phone key, the call is immediately connected to the telephone number you have specified here.
Enter the number, beginning with key	Enables the caller to call any extension. Please note that the digit you dial to invoke a specific feature is already the first digit of the dialable extension. Finish entering the digits with the [#] key.

7.3.1 How to Configure a Forwarding

To configure a forwarding proceed as follows:

Step by Step

1) Open the forward access page via **menu > Voicemail > Forward Access**.

2) In the **Access menu for** combo box select the case for which the forwarding is to apply: in case of an external/internal call, when your are conducting a call (your normal line is busy), when your are outside your office or when the caller has dialed your phone number outside business hours.

3) Select the respective action in the combo boxes.

At the same time the respective key number is set.

4) If necessary, enter the desired phone number in the **Number to dial** field.

> ***NOTICE:*** The phone numbers are generally copied from the database. Only for the cases where a forwarding to a freely defined phone number has been configured, you must enter this number in the **Number to dial** field.

5) Click **Save** to save your settings.

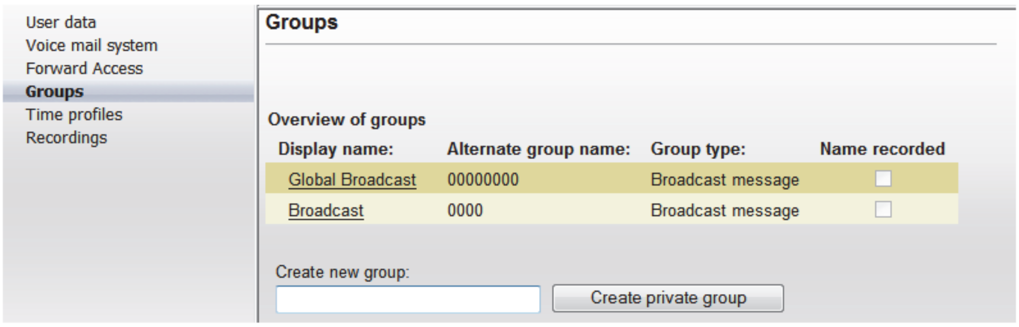
> ***NOTICE:*** Be sure to inform callers about these individual phone key(s) with appropriate greetings.

> ***NOTICE:*** The **Default menu** button resets the menu to its original appearance. Performed modifications are deleted then.

7.4 Groups

The voicemail system of the OpenScape UC Application enables you to quickly and easily create groups and manage them. In these groups you combine specific contacts. You can then send messages to all group members by using the group name for addressing.

You open this settings page via **menu > Voicemail > Groups**.

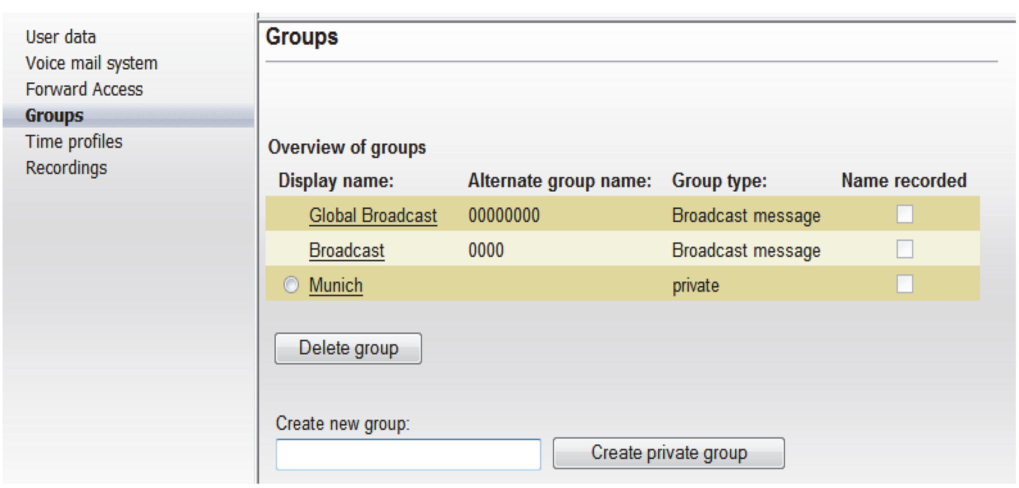


By default, this settings page displays the groups of type **Broadcast** your system administrator has pre-configured. Only users with administrator privileges can create and edit this type of group.

> ***NOTICE:*** These groups, if created by the system administrator, are automatically available to OpenScape UC Application or OpenScape Xpressions PhoneMail users with normal user privileges.

As OpenScape UC Application or OpenScape Xpressions PhoneMail user you can define up to ten private groups on this page. A private group contains contacts and/or other private groups that you can compile according to individual criteria.

With a click on the **Create private group** button you can display the name specified in the **Create new group** field in the **Overview of groups**.



The new group is thus created. However, it does not contain any members yet. A click on the group name displayed as link opens a dialog that lists the single group members or in which these members can be assigned to the group.

> ***NOTICE:*** Members of a group can be single users as well as groups already defined.

With a click on the **Delete group** button you can remove a group from the list the radio button of which you have previously activated.

> ***NOTICE:*** You can see the button for deleting a group only after creating a private group. As soon as all private groups have been deleted, the **Delete group** button is hidden again.

7.4.1 How to Create a new Private Group

How to create a new private group:

Step by Step

1) Open the groups-settings page via **menu > Voicemail > Groups**.

2) Enter the desired group name in the **Create new group** field.

3) Click the **Create private group** button.

The new group will be created and displayed. However, it has not been assigned any members yet.

7.4.2 How to Edit a Private Group

How to assign members to a private group or edit other settings:

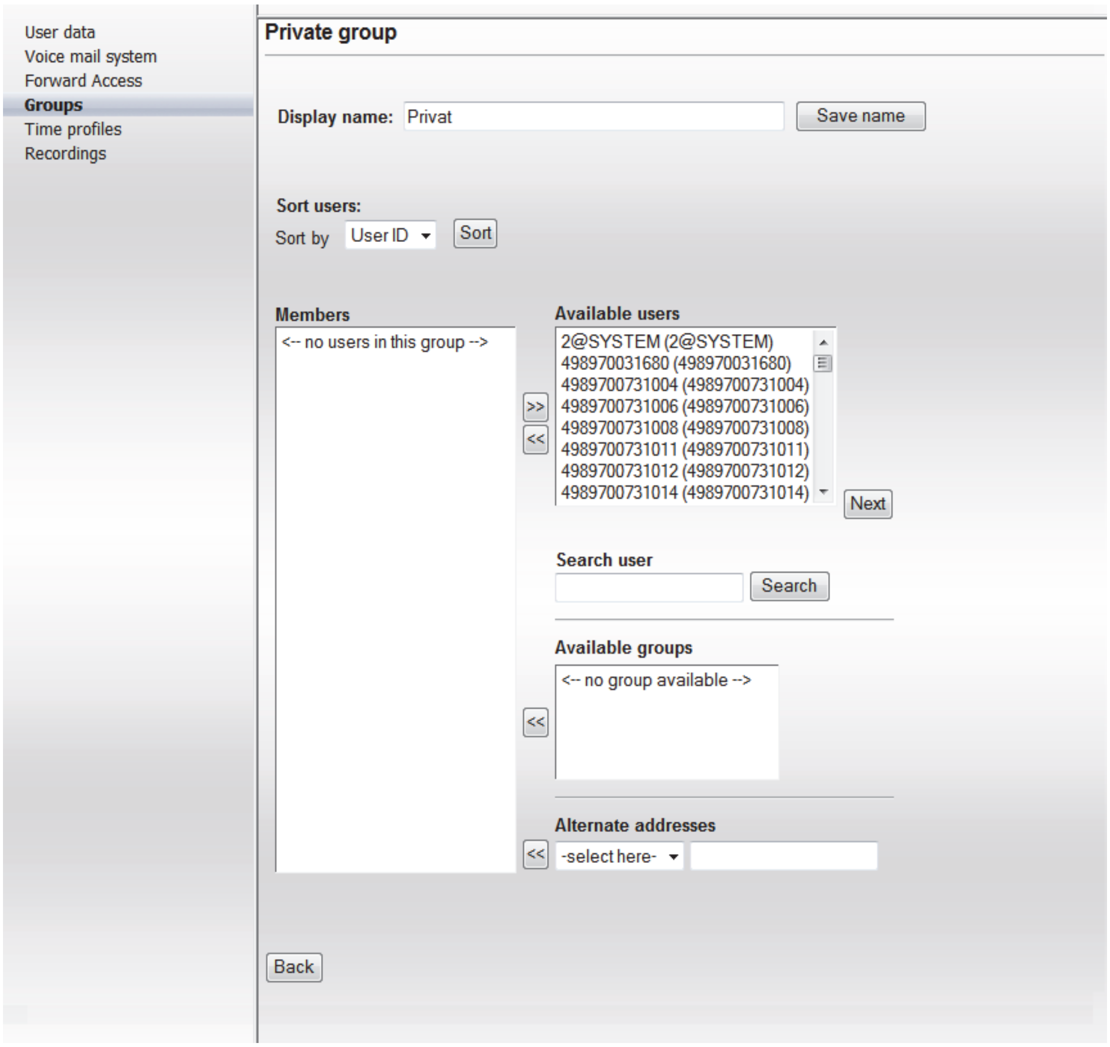
Step by Step

1) Open the groups-settings page via **menu > Voicemail > Groups**.

2) Click on the **Display name** of the group you wish to edit.

> ***NOTICE:*** If you select a group for which have no privilege, only the current settings are displayed, however, you may not carry out modifications. The **Save**... buttons and the group of the available users and groups are hidden.

The following page opens where you can execute the desired editing steps.



7.4.2.1 How to Admit Users to a Private Group

Prerequisites

- You are configured on the voicemail system as user.
- You have already created the desired private group.

How to integrate contacts as members in a previously defined private group:

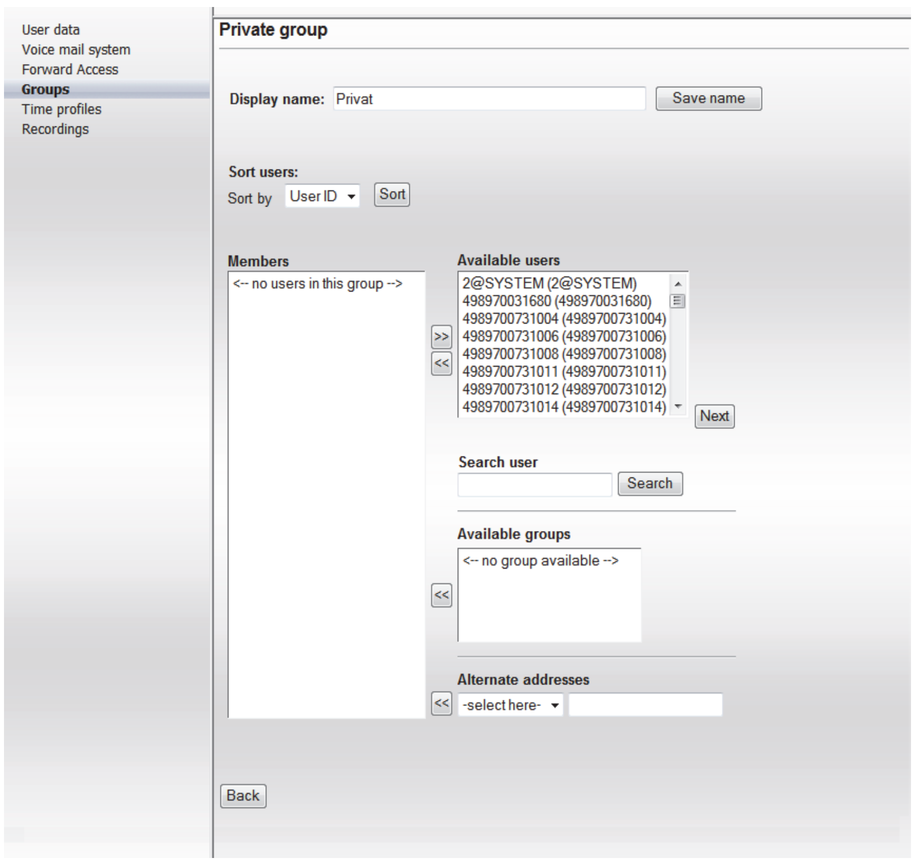
Step by Step

1) Open the groups-settings page via **menu > Voicemail > Groups**.

2) Click on the **Display name** of the group in which you wish to integrate the new member.

NOTICE: If you have selected a group that you are not allowed to edit for lack of privileges, for example a broadcast group, only the current settings are displayed, however, you may not carry out modifications. The **Save**... buttons and the group of the available users and groups are hidden.

The following page opens, on which you can assign the desired users to the selected group.



The **Available users** list shows all users registered in the system. The **Available groups** list shows all groups already created.

3) Select your preferred criterion for sorting the lists of available users and groups in the **Sort by** combo box.

4) Click the **Sort** button to update the sorting.

5) If the desired contact is currently not visible in the list of available users, click on the **Next** button for displaying the next 50 user list entries.

6) Click the **First** button to reload the first 50 entries.

> ***NOTICE:*** If you are looking for a particular name, enter the name in the **Search user** field and click **Search**.

7) To mark a user desired for the group, simply click this user in the **Available users** list.
8) Click the **<<** button to integrate the marked user in the group.
9) Proceed similarly for **Available groups** to add groups to the group if desired.
10) Apply the same procedure for inserting more users or groups.
11) If required, select other external addresses for the group (for example e-mail addresses) under **Alternate addresses** and click the **<<** button to add these to the group.
12) Click on the **Back** button.

    Your settings are saved. The **Groups** setting page is displayed.

7.4.2.2 How to Remove Users from a Group

To remove a user from a group proceed as follows:

Step by Step

1) Click on the entry you want to remove in the **members** list.

> ***NOTICE:*** Keep the **[Ctrl]** key pressed to select several entries at a time if required.

2) Click on the **>>** button.

The user has now been removed from the group. He/she is no longer itemized in the **Members** list.

7.4.2.3 How to Record a Group Name

Prerequisites

- You are configured on the voicemail system as user.
- You have already created a private group.

How to record a group name as greeting:

Step by Step

1) Open the groups-settings page via **menu > Voicemail > Groups**.
2) Click on the group's **Display name**.

The configuration page with available group settings opens.

3) Click the **Recording** link next to **Record group name**.

   The **Recordings** dialog opens.

4) Enter the number of the telephone from which you want to record the group name.

5) Then click on **OK**.

   The **Recordings** dialog closes. Your phone rings and you can start your recording.

6) Click on **Record** and record the desired name.

7) Click on **Exit**.

   You have now finished recording.

8) Click on **Save**.

   The name you have recorded has been backed up.

The **Recording** link next to **Record group name** is no longer displayed. The **Name recorded** column on the **Groups** page now features the corresponding check box ticked.

> ***NOTICE:*** The group name recording procedure is identical with the recording procedure.

7.4.3 How to Delete a Group

How to remove a private group from the list of groups:

Step by Step

1) Open the groups-settings page via **menu > Voicemail > Groups**.
2) Click the radio button that precedes the desired group to select the group.
3) Click the **Delete group** button. A security check appears.
4) Confirm the security check.

The selected group has been deleted.

7.5 Time Profiles

With help of a time profile you can define when and with which greetings your mailbox should react to incoming calls.

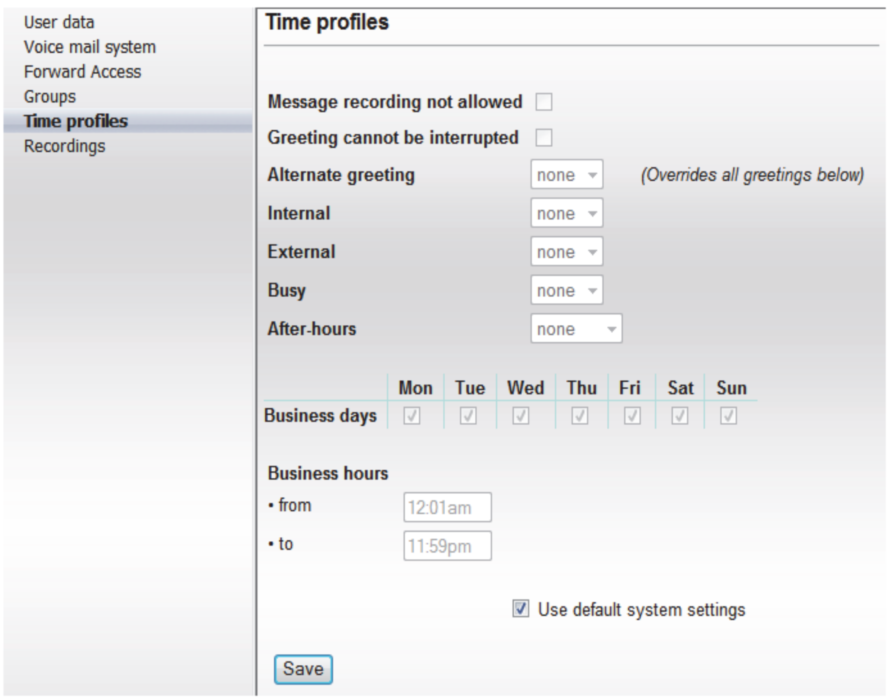
> ***NOTICE:*** The greetings that can be integrated in the time profile of this dialog must first be created via the **Recordings** feature.

Two time profiles are available:

- The time profile for the **simplified greeting configuration**, default-set at the program start. The simplified greeting configuration allows using only one greeting per greeting type and working day.
- The time profile for the **advanced greeting configuration**. It enables configuring the greetings of the single greeting types for each working day separately.

7.5.1 Time Profile for the simplified Greeting Configuration

In the simplified greeting configuration you can globally specify the greetings to be used only once. These settings then apply for all weekdays for which you have released the greetings.



You can configure the following settings for the simplified greeting configuration:

- **Message recording not allowed**
  If this option is activated, only a greeting text is played to the caller. He/she cannot leave a message in your mailbox.
- **Greeting cannot be interrupted**
  If this option is activated, it is not possible to interrupt a greeting by clicking a telephone key. You cannot use the telephone keys until the system has played the entire greeting.
  The only exception is the configured confirmation key (for instance ***** or **#**) that can be used at all times. If the configured confirmation key was ignored, it would not be possible to connect to your own voice mailbox.

- **Greetings**
  You can choose from the following options for every call type, for an alternate greeting, for after-hours greetings and for each day of the week:
  - **none**
    If you select **none** for the greetings, a standard system greeting will be used.
  - **Personal greetings**
    Personal greetings are only marked with a number in the list. You can only select the personal greetings you have previously recorded on the configuration page **Personal settings > Recordings**.
  - **Standard user greetings**
    Default user greetings are marked with a number and a star in the list. Only those default user greetings are available that a user with administrator privileges has previously recorded on the **Recordings** configuration page as default user greeting.
- **Business days**
  By activating the appropriate Business days check box you determine for which weekdays the selected greetings are to be played.
- **Business hours**
  You can enter a time range for business hours in the **from** and **to** input fields. Enter the times in hours and minutes (syntax: HH:MM). Outside the period specified here the greeting you have set under **After-hours** or a default greeting of the system is used.

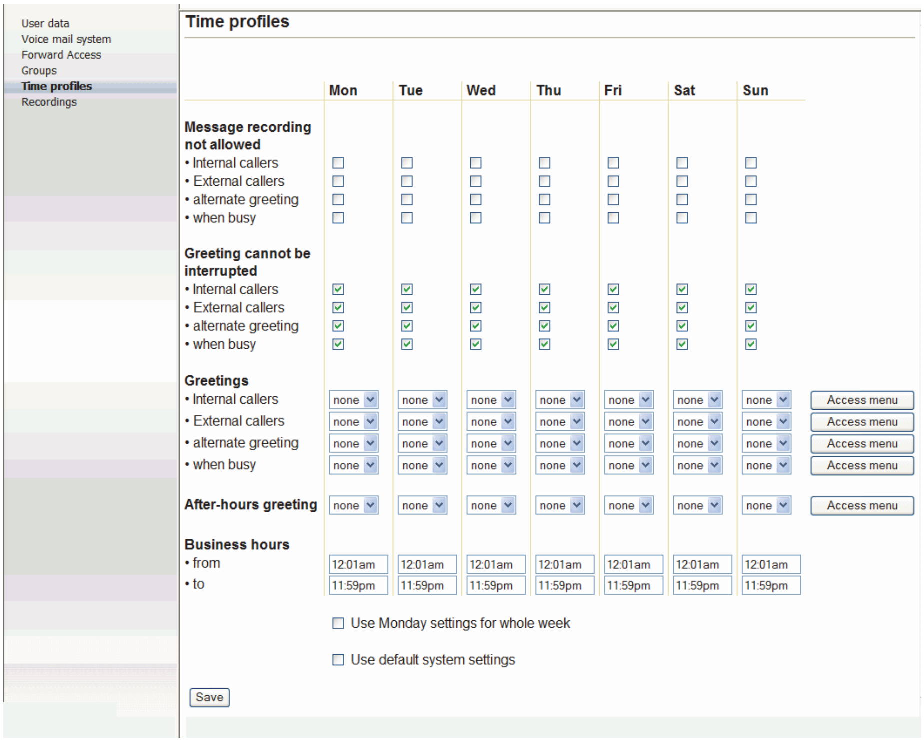
In the **Greetings** section you can assign personal greeting texts to different call types:

- **Alternate greeting**
  An alternative greeting is played independently from the call type (internal, external, busy). As soon as you record and activate this greeting, all incoming calls will be answered with it. This setting disables any other greetings you may have set for internal calls, external calls, calls with engaged line or outside business hours.
- **Internal**
  Select here the greeting to be played if the received call is an internal one (for example within your company).
- **External**
  Select here the greetings to be played if the received call is an external one (for example a call from the public telephone network).
- **Busy**
  Select here the greeting to be played if your telephone is busy when a call is received.
- **After-hours greeting**
  Select here the greeting to be played if a call is received outside the set business hours.

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

7.5.2 Time Profile for the Advanced Greeting Configuration

The advanced time-profile allows making individual settings for each weekday.



You can create an individual time profile for each weekday by assigning the settings to the corresponding greetings in a column each, respectively by selecting the corresponding greeting options.

You can use the following options and perform the following greeting settings:

- **Message recording not allowed**
  If this option is activated, only a greeting text is played to the caller. He/she cannot leave a message in your mailbox.
- **Greeting cannot be interrupted**
  If this option is activated, it is not possible to interrupt a greeting by clicking a telephone key. You cannot use the telephone keys until the system has played the entire greeting.
  The only exception is the configured confirmation key (for instance ***** or **#**) that can be used at all times. If the configured confirmation key was ignored, it would not be possible to connect to your own voice mailbox.
- **Greetings**
  You can choose from the following options for every call type, for an alternate greeting, for after-hours greetings and for each day of the week:
  – **none**
    If you select **none** for the greetings, a standard system greeting will be used.

- **Personal greetings**
  Personal greetings are only marked with a number in the list. You can only select the personal greetings that you have previously recorded on the configuration page **Personal settings > Recordings**.
- **Standard user greetings**
  Default user greetings are marked with a number and a star in the list. Only those default user greetings are available that a user with administrator privileges has previously recorded on the **Recordings** configuration page as default user greeting.

- **Business days**
  By activating the appropriate Business days check box you determine for which weekdays the selected greetings are to be played.
- **Business hours**
  You can enter a time range for business hours in the **from** and **to** input fields. Enter the times in hours and minutes (syntax: HH:MM). Outside the period specified here the greeting you have set under **After-hours** or a default greeting of the system is used.
- **Further settings**
  Via the Use Monday settings for whole week option you can copy the settings made for Monday to all weekdays and thus simplify the configuration.
  Via the **Use default system settings** option you can copy the settings that the administrator has globally made for the system as standard user profile. When you select this option, all other selections and settings in the Time profiles dialog are disabled.

In the **Greetings** section you can assign personal greeting texts to different call types:

- **Alternate greeting**
  An alternative greeting is played independently from the call type (internal, external, busy). As soon as you record and activate this greeting, all incoming calls will be answered with it. This setting disables any other greetings you may have set for internal calls, external calls, calls with engaged line or outside business hours.
- **Internal**
  Select here the greeting to be played if the received call is an internal one (for example within your company).
- **External**
  Select here the greetings to be played if the received call is an external one (for example a call from the public telephone network).
- **Busy**
  Select here the greeting to be played if your telephone is busy when a call is received.
- **After-hours greeting**
  Select here the greeting to be played if a call is received outside the set business hours.

Click on **Save** your settings.

7.5.3 How to Select the Greeting Configuration

Proceed as follows to switch from a simplified greeting configuration to the enhanced greeting configuration.

Step by Step

1) Open the settings page for the voicemail system via **menu > Voicemail > Voice mail system**:

2) Untick the **Use simplified greeting configuration** check box.

3) Click on the **Save** button at the bottom margin of the page.

Your modifications are saved.

7.5.4 How to Create a Time Profile for the Simplified Greeting Configuration

How to create a time profile for the simplified greeting configuration:

Step by Step

1) Open the settings page for the voicemail system via **menu > Voicemail > Voice mail system**:

2) Tick the **Use simplified greeting configuration** check box.

3) Click on the **Save** button at the bottom margin of the **Voice mail system** page.

Your modifications are saved.

4) Click on **Time profiles** in the navigation section.

The **Time profiles** setting page opens on which you can perform settings for the new time profile.

5) Set whether a message recording should be allowed. Activate or deactivate the **Message recording not allowed** option.

6) Set whether the caller may interrupt the greeting. Activate or deactivate the **Greeting cannot be interrupted** option.

7) Set the greetings for the single call types. In the corresponding combo boxes select a greeting for each call type. If you do not select a greeting for a call type, the default system greeting is used for this call type.

8) Select the business days for which the greetings are to become effective.

9) Set the business hours.

10) Via the **Use default system settings** check box you can copy the system default settings.

NOTICE: If you select this option, all other selection and settings options on this page become inactive.

11) Click on the **Save** button.

A confirmation message informs you that your settings have been backed up.

Creating a time profile for the simplified greeting configuration is now complete.

7.5.5 How to Create a Time Profile for the Advanced Greeting Configuration

How to create a time profile for the enhanced greeting configuration:

Step by Step

1) Open the settings page for the voicemail system via **menu > Voicemail > Voice mail system**:

2) Untick the **Use simplified greeting configuration** check box.

3) Save your modifications via the **Save** button at the bottom margin of the **Voice mail system** page.

4) Then open the configuration page for the time profile by clicking on **Time profiles** in the navigation section.

5) Set here whether a message recording should be allowed. Activate or deactivate the **Message recording not allowed** option.

6) Set whether the caller may interrupt the greeting. Activate or deactivate the **Greeting cannot be interrupted** option.

7) Set the greetings for the single call types. In the corresponding combo boxes select a greeting for each call type. If you do not select a greeting for a call type, the default system greeting is used for this call type.

8) Set the business hours.

9) Via the **Use Monday settings for whole week** check box you can transfer the Monday settings to all other days. If you do not select this option, you need to execute steps 5 to 8 for each weekday.

10) Via the **Use default system settings** check box you can copy the system default settings.

> ***NOTICE:*** If you select this option, all other selection and settings options on this page become inactive.

11) Click the **Save** button.

A confirmation message informs you that your settings have been backed up.

Creating a time profile for the advanced greeting configuration is now complete.

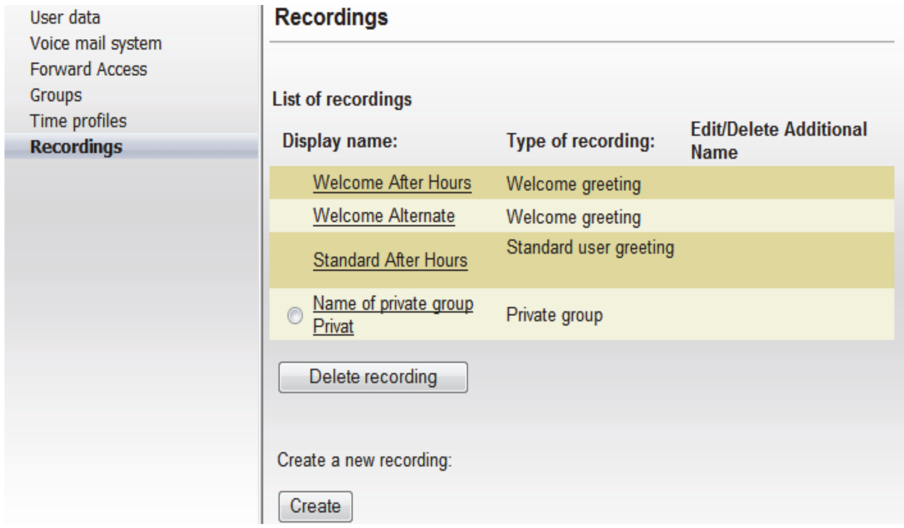
7.6 Recordings

The **Recordings** configuration page displays the recordings available to the user. These recordings are assigned to the different call types via time profiles.

You can back up nine personal greetings and one name greeting.

> ***NOTICE:*** The recording type **Personal group** is only visible if you have created a personal group on the **Groups** settings page.

You open this settings page via **menu > Voicemail > Recordings**.



Different user types are provided with different recording types:

- **Standard user**
  - **Welcome greeting**
    Recordings of this type are only displayed if they have been created by an administrator or company.
  - **Standard user greeting**
    Recordings of this type are only displayed if they have been created by an administrator or system.
  - **Private group**
    Recordings of this type are only displayed if they have been created by the user. Greetings of this type can only be created if a private group has been previously generated.
  - **Personal name recording**
    Recordings of this type are only displayed if they have been created by the user.
  - **Personal greeting**
    Recordings of this type are only displayed if they have been created by the user.
- **Company**
  - **Welcome greeting**
    Recordings of this type are only displayed if they have been created by an administrator or company.
- **System**

– **Standard user greeting**
  Recordings of this type are only displayed if they have been created by an administrator or system.
– No recording of type “Private group” is displayed, even if the user has made such a recording.

- **Administrator**
  – An administrator may use advanced recording options.

You can use any terminal device for your recording.

NOTICE: If your administrator has created and configured global greetings (company greetings), they will be replaced by your personal greeting.

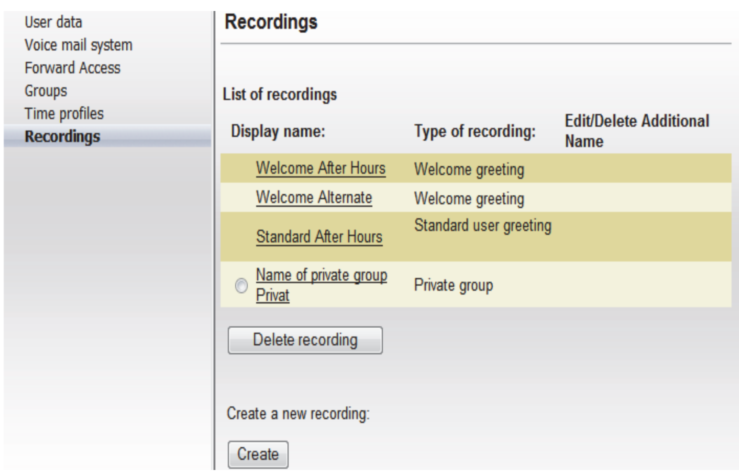
7.6.1 How to Record and Edit Greetings

How to record or modify a personal greeting:

Step by Step

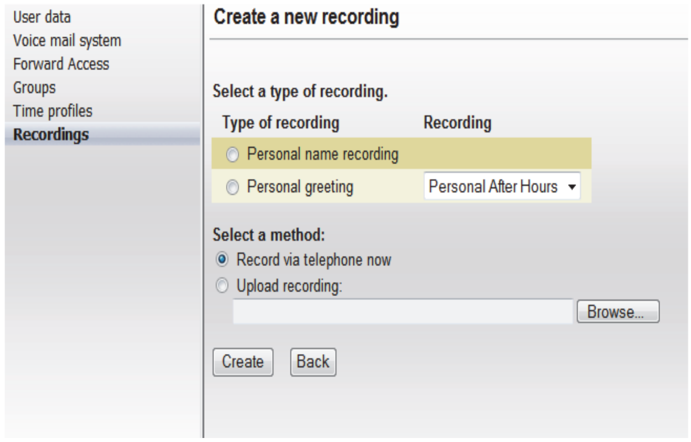
1) Open the **Recordings** settings page for the voicemail system via **menu > Voicemail > Recordings**:

The following page opens:



2) Click on the **Create** button.

The following page opens:



NOTICE: You can back up nine personal greetings and one name greeting. The recording type **Personal group** is only visible if you have created a personal group on the **Groups** page.

3) Select the desired recording type in the column under **Type of recording** via the respective radio button in front of the entry. The following options are available:

- **Personal name recording**
- **Personal greeting**
- **Private group**

NOTICE: This option is only displayed if you have configured a private group.

4) In the **Recording** column select the details. In case of a personal greeting this is the call type. In case of a personal group this is the group name. Based on this call type respectively name a recording may be selected, for example, in a time profile.

5) Determine the recording you wish to deploy under **Select a method** and by activating the corresponding radio button:

- **Record via telephone now**
  Option for recording the desired greeting on your telephone
- **Upload recording**
  Option for using a file that exists already in your file system

6) Click on the **Create** button.

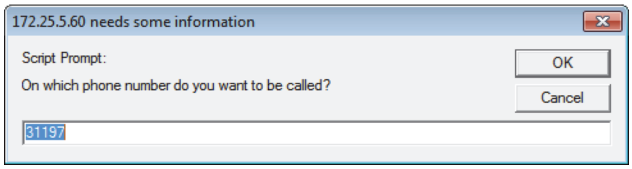
Depending on the selected method continue as described in the following.

7.6.1.1 How to Record Greetings by Telephone

If you have selected the **Record via telephone now** option under **Select a method**, proceed as follows to record a greeting on your telephone:

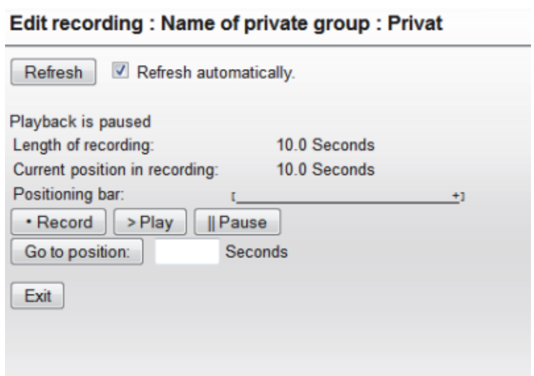
Step by Step

1) Enter the number of the telephone you wish to use for recording the greeting in the following dialog.



2) Then click on the **OK** button.

Your phone rings. As soon as you have picked up the receiver the following page is displayed:



3) Click on the **Record** button.

Recording starts.

4) Click on the **Pause** button to interrupt the recording.

The current length of the greeting is displayed on the positioning bar for your information.

5) Click the **Play** button to play back the recording and listen to your recording via the telephone handset.

6) If you are satisfied with your recording, click the **Exit** button.

The recording is saved and the **Recordings** page reappears.

7) If you would like to repeat the recording, click the left end of the positioning bar to rewind to the start of the recording and then click the **Recordings** button to restart the recording.

8) Enter a number in the input field beneath the buttons and click the **Go to position:** button to move to a specific position in the recording.

> ***NOTICE:*** If you have selected the **Auto refresh** option, the cursor will always be set to the beginning of the input box by the repeated download of the page. This complicates the input. Deactivate this option before using the time input field.

The current position is displayed in seconds via the buttons and on the positioning bar.

7.6.1.2 How to Upload an Existing Greeting File

If you have selected the **Upload recording** option under **Select a method**, proceed as follows to use an existing greeting file from your file system:

Step by Step

1) Enter the path and file name of the prepared file in the text field or find the desired file in the file system via the **Browse...** button.
2) Click on the **Create** button.

The recording is saved and the **Recordings** page reappears.

7.6.2 How to Delete Greetings

> ***NOTICE:*** A greeting currently used in a time profile cannot be deleted. Before you delete a greeting, check whether this greeting is used in a time profile.

Step by Step

1) In the recording list select the greeting you would like to delete by clicking the radio button in front of the entry.
2) Click on the **Delete recording** button.

   You are prompted to confirm the deletion.
3) Click on **OK**.

The selected greeting is deleted and you see the **Recordings** page again.

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