Harmonize your enterprise

OpenScape UC Application V7
OpenScape Desktop Client Enterprise Web Embedded Edition

User Guide

A31003-S5070-U103-8-7619

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.

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Reference No.: A31003-S5070-U103-8-7619

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Contents

History of Changes

Date	Changes	Reason
2012-03-05	ADDED: The call control window of a conference can be reached via a URL depending on the system environment.	FRN4401
2012-03-05	ADDED: When logging on in the **Profile creation** dialog for the first time the user need not perform any manual configurations.	FRN4403
2012-03-05	ADDED: In the **Port restrictions** dialog of the SIP Service Provider you can define the port ranges for audio and video streaming.	FRN4685
2012-04-16	ADDED: If the preferred device currently used differs from the ONS device configured for the OpenScape UC Application user, incoming calls cannot be accepted via the desktop notification (green receiver unavailable) that pops up.	CQ00196608
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: The dialog for configuring the QoS settings of the **SIP Service Provider** are available under Microsoft Windows XP only.	CQ00207211
2012-04-26	CHANGED: Several adjustments of the information about user presence and instant-messaging functionality.	CQ00207354
2012-04-27	ADDED: New section “IBM Lotus Notes Integration”	
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.	
2012-04-27	ADDED: Description of the available video conference layouts and of the menu on the video screen.	FRN4945
2012-04-30	ADDED: Description of the radio button **Select/Deselect all entries** in the contact list.	FRN5340
2012-05-31	CHANGED: Further adjustments of the information about user presence and instant-messaging functionality.	CQ00212624
2012-08-06	CHANGED: The personal status text is independent of the presence status.	CQ00219355
2012-08-17	ADDED: Description of the settings for the **Notifier Toast (Desktop Alerts)** module.	
2012-08-24	ADDED: New option **Video conference** in the configuration dialog of a new Meet Me conference.	FRN5185

Date	Changes	Reason
2012-08-24	CHANGED: You cannot select any web conference provider in the configuration dialog of a Meet Me conference. The presence status of the participants is no longer displayed either.	
2012-08-24	ADDED: Description of the new options in the configuration dialog of an audio scheme: **Echo cancelling Enable**/disable and **Echo cancelling delay (ms)**.	FRN4942
2012-08-24	ADDED: Description of the new options for the **default video configuration** in the configuration dialog of a video scheme. New video layouts are supported during a video call: **In call**, **Full window** and **Full screen**.	FRN4954
2012-08-27	ADDED: Your own video image is not longer displayed as additional tile in the video window by default. You can add it via the menu in the video window.	FRN4957
2012-09-07	ADDED: Description of the Team feature.	FRN4922
2012-09-07	ADDED: Description of the features in the Softphone toolbar in the **Video** window.	FRN4956
2012-09-12	ADDED: You can initiate a Merge Calls video conference.	FRN4953
2012-08-28	CHANGED: Common Management Portal has been renamed as Common Management Platform.	FRN5833, CQ00232627
2012-09-11	ADDED: The buttons for configuring new devices may be hidden for specific OpenScape UC Application users. In this case there is no way of removing devices from the device and named device list(s).	FRN6008, CQ00230770
2012-09-11	ADDED: Scheduled Meet Me conferences created with OpenScape Extensions for Outlook can be deleted and edited by the creator via the GUI of the OpenScape Desktop Client Enterprise Web Embedded Edition. Each participant of such a conference can exclude himself/herself from the conference.	FRN5180
2012-09-14	ADDED: Step-by-step guide for using the Call Pickup feature.	CQ00226188
2012-09-19	ADDED: Information about the devices available for the **Action** (routing destination) setting of a rule.	CQ00226540
2012-09-20	ADDED: The video screen quality or screen resolution may change during an active call. Such changes result from the bandwith for transmitting video data streams automatically adjusting to the available bandwidth resources of the communications system.	FRN4943
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
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: Display of a group pickup call in a desktop notification is no longer supported. The settings of the **Notifier Toast (Desktop Alerts)** module have ceased to exist. Consequently, the corresponding section has been removed from the documentation.	CQ00241234

Date	Changes	Reason
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
2013-03-01	ADDED: Using a new icon in the Softphone menu and in the Softphone toolbar of the Video window the user can activate/disable the Video Call feature. In addition, 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
2013-03-13	CHANGED: Description of the roles in a team.	CQ00246793
2013-03-14	CHANGED: The figures in the “Overview of the User Interface” section have been updated and show now the new icon for using the video call feature in the Softphone menu also.	CQ00250965
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
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: New feature in the Softphone menu of the **Call Control**: **New Audio Device**. It enables configuring and using a new audio device while operating the program.	
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
2013-06-11	ADDED: Automatic detection of audio and video devices.	CQ00216848

Date	Changes	Reason
2013-06-18	ADDED: Ad-hoc conferences support audio only.	CQ00264104
2013-06-28	REMOVED: After activation of the callback feature (CCBS, CCNR) a confirmation announcement is played.	CQ00226418
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
2013-09-02	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
2013-09-04	ADDED: Procedure applied for specifying **system-wide hotkeys**	CQ00269710
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

You can operate the OpenScape Desktop Client Enterprise Web Embedded Edition with an HFA connection to a HiPath 4000 PBX as HFA softphone or with an SIP connection to an OpenScape Voice PBX as SIP softphone. By integrating the OpenScape Web Client functionality, it offers additional features of the OpenScape UC Application server from the presence and conferencing area. The client provides middle-sized and large enterprises with the option to integrate e-mail, Voicemail, Fax and Instant Messaging services. When you connect this software solution to an OpenScape Voice it enables video telephony.

The OpenScape Desktop Client Enterprise Web Embedded Edition serves more purposes than being used as softphone on individual user computers. As CTI client in a terminal server environment it enables controlling phone devices.

1.1 Target Group of this Manual

This manual addresses:

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

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

1.2 Contents of this Manual

This manual describes how to configure and operate OpenScape Desktop Client Enterprise Web Embedded Edition after the setup.

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: Configuration and Settings

This chapter tells you how to set parameters required for operation.

Chapter 3: Operation Reference

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

Chapter 4: General Main Menu Settings

This chapter serves as reference for basic configuration of the integrated web interface via main menu.

Chapter 5: Communicating with Contacts

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

Chapter 6: Step-by-Step

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

Chapter 7: 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 8: 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`

Purpose	Appearance	Example
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 Desktop Client Enterprise Web Embedded Edition in the following documentation:

- *OpenScape UC Application V7 OpenScape Desktop Client Enterprise Web Embedded Edition Installation and Administration*, setup guide
  Contains information about setting up and uninstalling OpenScape Desktop Client Enterprise Web Embedded Edition and as well as detailed information about program configuration and the tools supplied for administrators of OpenScape Desktop Client.

- *OpenScape UC Application V7 OpenScape Desktop Client Enterprise Web Embedded Edition*, quick guide
  Describes the basic OpenScape Desktop Client Enterprise Web Embedded Edition features.
- *OpenScape UC Application V7 Client Applications*, operating instructions
  This manual offers an overview of all OpenScape UC Application V7 clients.
- *OpenScape Web Collaboration*, operating instructions
  Describes the functions of the web conferencing solution and its controls.

1.5 Acronyms

Table: Acronyms used

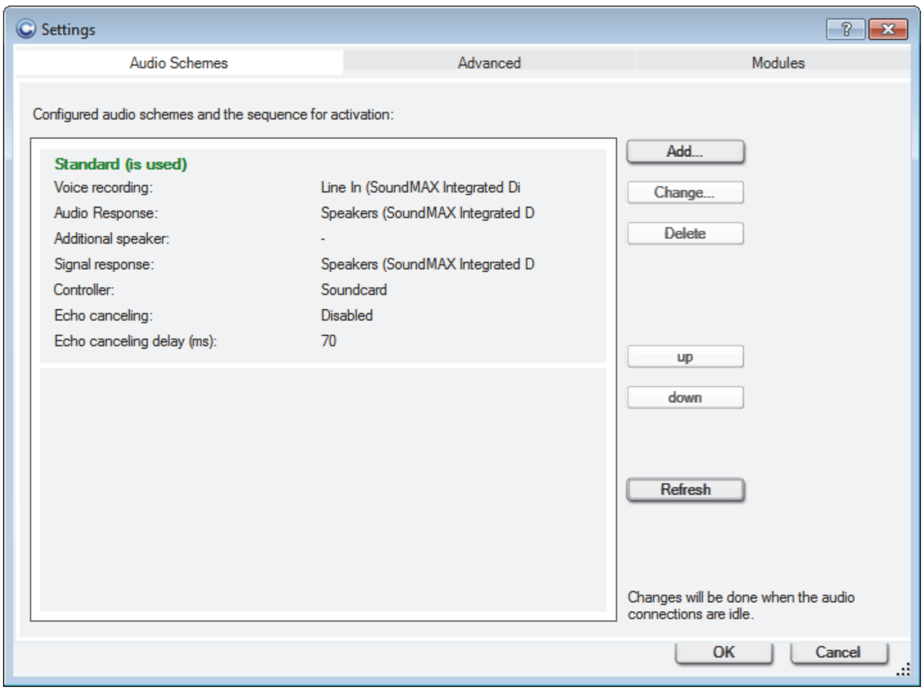
Abbreviation	Meaning
ACD	Automatic Call Distribution
BLF	Busy-Lamp Field
CAC	Call Admission Control
CCBS	Completion of Calls to Busy Subscriber
CCNR	Completion of Calls on No Reply
CLA	Customer License Agent
CMP	Common Management Platform
CSV	Comma Separated Value
DLC	DLS Client
DLS	DepLoyment Service
DMC	Direct Media Connect
DNS	Domain Name System
DTMF	Dual -Tone Multi-Frequency
GAL	Global Address List
HFA	HiPath Feature Access
HLM	HiPath License Management
IPC	InterProcess Communication
LAN	Local Area Network
LDAP	Lightweight Directory Access Protocol
LED	Light-emitting Diode
LIN	Local Identification Number
MLHG	Multi-Line Hunt Group
MWI	Message Waiting Indicator
NANP	North American Numbering Plan
OCS	Office Communications Server

Abbreviation	Meaning
QoS	Quality-of-Service
qWAVE	Quality Windows Audio/Video Experience
RNA	Ring-No-Answer
SDES	Session Description Protocol (SDP) Security Descriptions for Media Streams
SIP	Session Initiation Protocol
SRTP	Secure Real-time Transport Protocol
TCSPI	Telephony Conferencing Service Provider Interface
TLS	Transport Layer Security
UC	Unified Communications
URI	Uniform Resource Identifier
VPN	Virtual Private Network

2 Configuration and Settings

Operating the OpenScape Desktop Client smoothly requires various individual user settings. Type and volume of these settings depend among other things on the installed and activated modules, basic network parameters and installed audio hardware. Some settings must be performed before the initial login, since proper operation is otherwise not possible. Other settings can be performed during operation.

You edit user settings in the **Settings** dialog.



You can open this dialog in two ways: Either click on the **Manage** button in the Logon dialog and then select **Settings**. Or, during operation after the login, select the **OpenScape Options** item in the OpenScape context menu that you open in the notification area of the Windows task bar.

NOTICE: During live operation, not all settings can be modified.

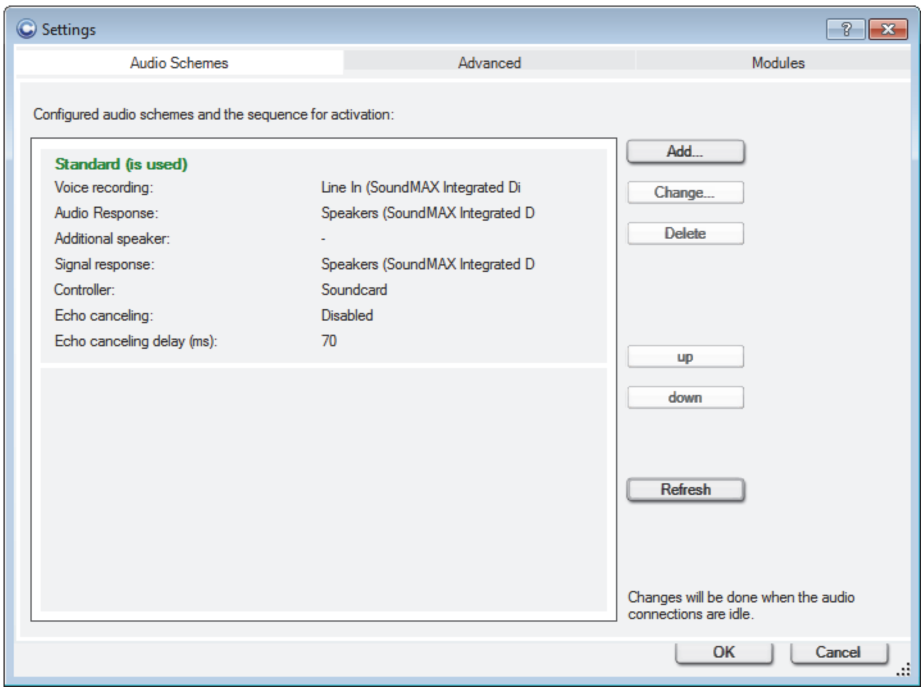
2.1 "Audio Schemes" Tab

NOTICE: Various audio devices are supported for operating OpenScape Desktop Client. You find comprehensive information about these devices in the OpenScape Desktop Client Enterprise Web Embedded Edition setup guide.

So that you can conduct phone calls, your computer must be equipped with speaker and microphone, for example in the form of a headset.

> ***NOTICE:*** OpenScape Desktop Client supports operating a range of audio devices. You find a list of these devices in the setup manual of OpenScape Desktop Client Enterprise Web Embedded Edition.

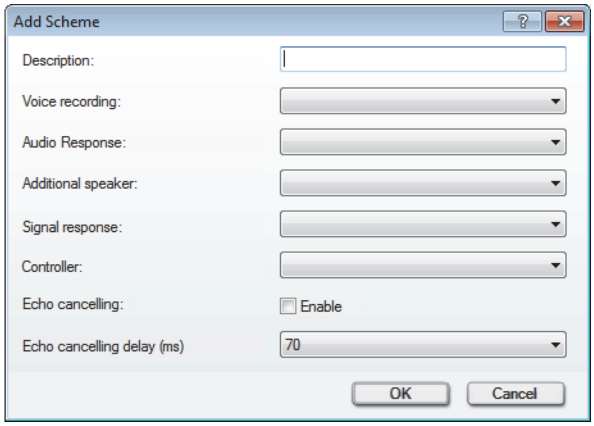
The hardware settings are grouped in audio schemes. To set the audio schemes, select in the **Settings** dialog the **Audio Schemes** tab during the user login.



You can add audio schemes and modify or delete single audio schemes. In this way you can easily program various audio options (for example on different hardware) and then select them as the scheme you want to use.

Adding an audio scheme

A click on the **Add...** button defines a new audio scheme in the OpenScape Desktop Client. The following dialog opens:



- Enter an expressive text for the audio scheme under **Description**. This text appears in green (the audio scheme is available) or red writing (the audio scheme is unavailable) in the list of configured audio schemes.
- Select the audio hardware for the voice recording under **Voice recording**.
- You determine the audio hardware for voice playback under **Audio Response**.
- You select optionally the audio hardware for the additional speaker under **Additional speaker**. If you have specified an additional speaker here and this audio scheme is being used by OpenScape Desktop Client, the Softphone menu of the **Call Control** and the Softphone toolbar of the **Video** window display the icon. .

> ***NOTICE:*** The hardware for the **additional speaker** and **audio response** must be different.

- You determine the audio hardware for the ring tone under **Signal response**.
- Under **Controller** you select the audio hardware for controlling special hardware functions.

> ***NOTICE:*** Components of an audio scheme currently locally unavailable are represented in brackets. The entire audio scheme is then considered unavailable. The OpenScape Desktop Client may then use the next available audio scheme.

- **Echo cancelling Enable**/Disable
  Selecting the **Enable** option activates the echo cancelling.
  This will remove unwanted echo signals during voice transmission. Echo cancelling is disabled by default but we recommend to activate it.
- **Echo cancelling delay (ms)**
  During an active call (for example in an audio conference), feedbacks may occur between speaker and microphone. The signal that the speaker sends is picked up by the microphone and transmitted in addition to the actual voice

signal as so-called echo signal with a slight delay. The **Echo cancelling delay (ms)** specifies the possible delay time between sending the loudspeaker signal and its being picked up by the microphone. The delay influences the echo cancelling efficiency. A delay of 70 ms is assumed by default but depending on the system used this value may deviate and needs to be adjusted accordingly. The values you can select for this setting are **0 ms**, **70 ms** or **140 ms**.

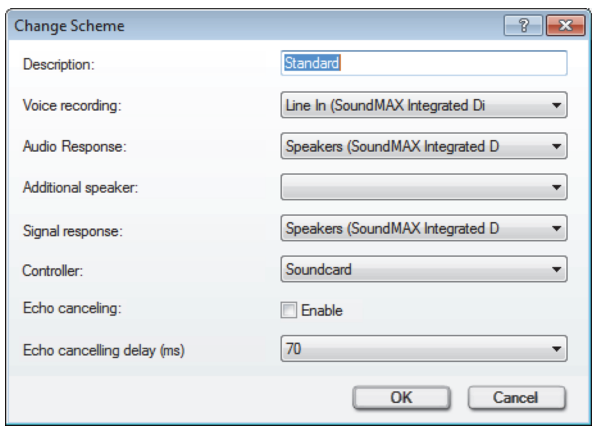
> ***NOTICE:*** Before you change the **Echo cancelling delay (ms)** please consult your system administrator.

Selecting/activating audio schemes

To select an audio scheme, click the one you want in the list of audio schemes.

Changing an audio scheme

You can edit the settings of the selected audio scheme by clicking on the **Change...** button. The following dialog opens:



The possible settings are identical with the settings for a new audio scheme.

Deleting an audio scheme

You can remove a selected audio scheme from the list of configured audio schemes with a click on the **Delete** button.

Sequence of audio schemes

You can use the audio scheme sequence to influence the required audio hardware selected. After the user has logged in, the OpenScape Desktop Client checks the audio hardware specified in the audio schemes and processes the schemes one after the other from top to bottom. If all components set for a scheme are available and ready for operation, this scheme is used for operating the OpenScape Desktop Client.

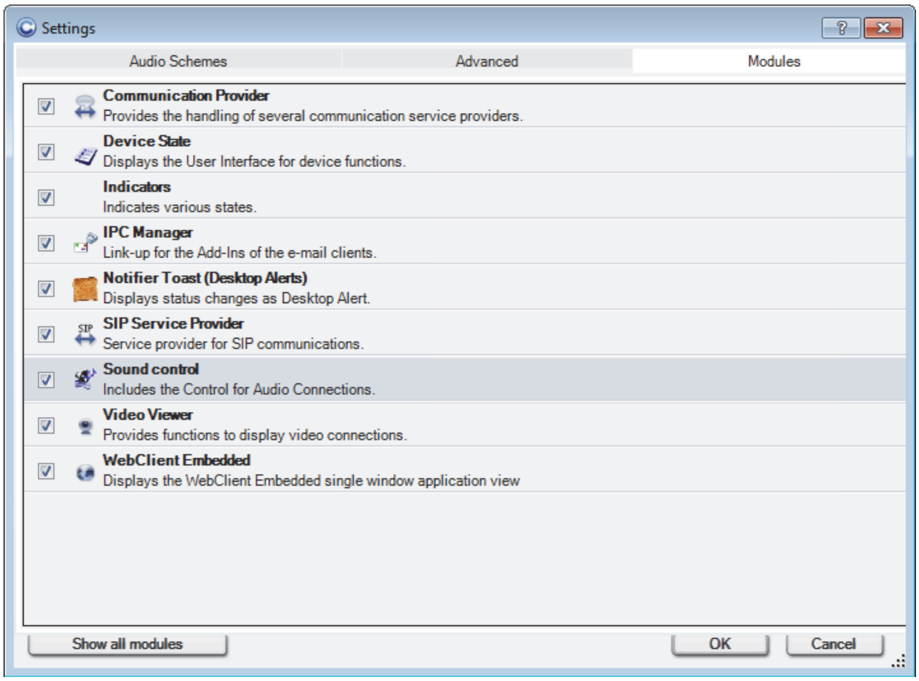
You can change the sequence of an audio scheme with the buttons **up** and **down**.

Click the **Refresh** button to check the availability of added audio schemes and to display the scheme currently used.

2.2 "Modules" Tab

The OpenScape Desktop Client Enterprise Web Embedded Edition consists of various modules. Each module provides an individual feature. During the installation only those modules are automatically added to the configuration that are set for the selected default provider - **SIP** or **HiPath Provider** - on the basis of their functionality or features. Such modules are listed on the **Modules** tab.

The following figure exemplifies the **Modules** tab with **SIP Service Provider** use.



> ***NOTICE:*** A guide to adding or removing modules is given in the setup manual *OpenScape UC Application V7 OpenScape Desktop Client Enterprise Web Embedded Edition Installation and Administration*.

> ***NOTICE:*** You can activate or deactivate modules only before you log in. This is not possible during operation.

The following table lists all modules installed by default and summarizes their functions depending on the setup type - SIP (**SIP Service Provider**) or HFA (**HiPath Provider**).

Module	Description	Setup type	
		SIP	**HFA**
Communication Provider	Enables SIP Service Provider operation.	✓	✗
Device State	This module provides the telephone menu as part of the Softphone menu.	✓	✓
HiPath Provider	Provides the connection to a HiPath 4000 PBX.	✗	✓
IPC Manager[1]	This module is required for initiating calls from Microsoft Outlook via the OpenScape Desktop Client.	✓	✓
Notifier Toast (Desktop Alerts)[1]	This module is responsible for displaying status or connection changes in the form of desktop alerts.	✓	✓
SIP Service Provider	This module enables SIP telephony with the OpenScape Desktop Client.	✓	✗
Sound control[1]	This module is in charge of the audio control (audio buttons, volume menu, volume control).	✓	✓
Video Viewer	This module enables representing video images in the video window. You can perform the settings of this module in the dialog **Settings > Advanced > SIP Service Provider**.	✓	✗
WebClient Embedded	This module represents the OpenScape Web Client in the Desktop Client window view. Furthermore, the module provides the presence, conference and journal functionality as well as enables the contact list and device management.	✓	✓
Status and Event Display[1]	This module serves as indicator plugin and enables the display of various events and statuses, for example secure or non-secure SIP connection, in the main bar.	✓	✗

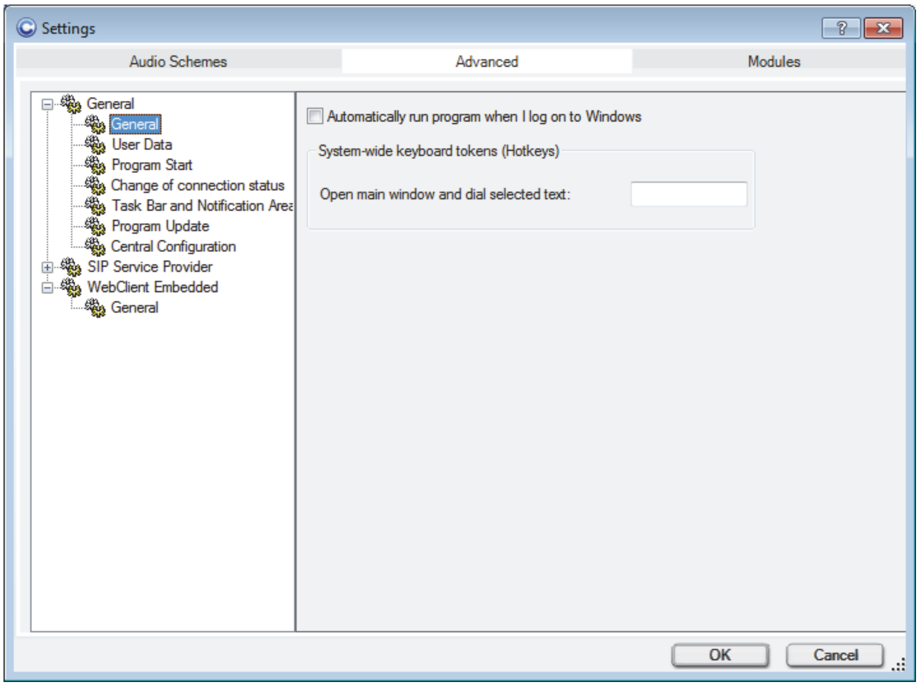
1 For this module no **Settings** are possible or required on the **Advanced** tab.

✓ The module is required for this setup type by default and installed/activated automatically.

✗ The module is not required for this setup type by default and not installed/activated automatically.

2.3 "Advanced" Tab

On the **Advanced** tab you can perform the main settings for the application. The single main settings are subdivided in subsettings.



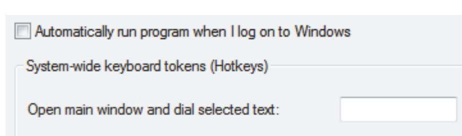
You can perform the following main settings, listed in the left-hand area, by default.

2.3.1 General Settings

The **General** settings include the following sub-settings.

2.3.1.1 General

You can select a preset and coordinated color scheme to adjust the color layout of your OpenScape Desktop Client. For this purpose, select on the tab **Advanced > General > General**.



In the right-hand section of the **Advanced** tab you can perform the following settings:

- Activating the **Automatically run program when I log on to Windows** check box starts the OpenScape Desktop Client automatically when you perform your Windows logon to the system.

- **Open main window and dial selected text:**
  In this input field you can define a key or hotkeys considered **System-wide keyboard tokens (hotkeys)** to reopen the main window or move it to the foreground when it is hidden or minimized. The cursor is automatically positioned in the **<Name or Number>** input field of the main menu.
  If you have selected a phone number in another application and then press the hotkey defined here, the phone number appears in the **<Name or Number>** input field of the main menu and is automatically dialed by the program.

> ***NOTICE:*** The system-wide keyboard token (hotkey) is also available during operation in restricted mode.

> ***IMPORTANT:*** System-wide means in this case that no other application executed on your computer in parallel to the OpenScape Desktop Client will react to these keys. Be sure not to enter keys or hotkeys allocated in other programs or in the Windows environment with functions that you want to use.

Admissible keys or hotkeys are:

- **[F2]** to **[F11]**, also in combination with **Shift** or **[Ctrl]**,
- Letter keys **A** to **Z** and the digit key **0** to **9**, also in combination with **[Ctrl]**,
- The hotkey **Shift** + [Esc],
- **Blank** key,
- **[Alt]** + Shift + [Ctrl].

> ***NOTICE:*** You must not define the function keys **[F1]** and **[F12]** as hotkeys.

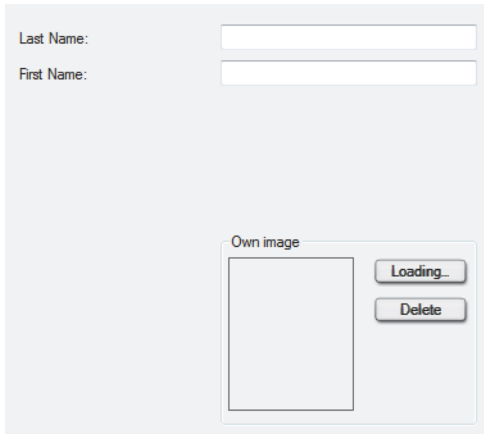
To specify hotkeys, click in the input field and push the desired key or hotkey. The desired key or hotkey is displayed in the input field.

2.3.1.2 User Data

> ***NOTICE:*** You can set or modify user data only while logging on and not while the system is in operation.

> ***NOTICE:*** These settings do not serve any purpose in using the OpenScape Desktop Client Enterprise Web Embedded Edition.

You can enter your **First Name** and **Last Name** here as well as paste your **Own image**. This image is only used during a chat (instant messaging). It will not be stored on the server and not transferred, i.e. it is not visible for the chat partner.



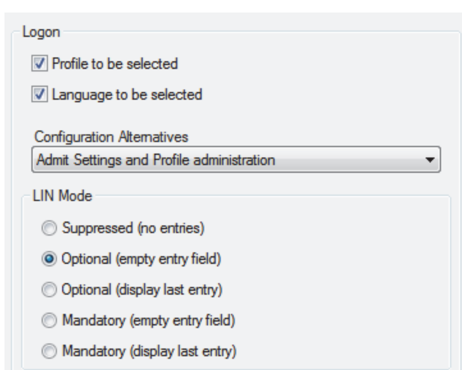
You can add your image via the **Loading...** button. Select the relevant image file in the open file selection dialog. Then click the **Open** button. The selected image appears in the **Own image** section.

Clicking the **Delete** button removes the image.

2.3.1.3 Program Start

NOTICE: Options for editing program start settings are only available when you activate them while operating the OpenScape Desktop Client. Open the OpenScape context menu in the Windows task bar and select the **OpenScape Options** menu item.

To edit the OpenScape Desktop Client start-up options, select on the tab **Advanced > General > Program Start**.



You can define the following settings for the program start:

- **Profile to be selected**
  When you select this option, the login dialog displays the field for selecting a profile. If this option is not selected, there are no profile-specific administration functions available in the **Logon** dialog.
  Activate this setting, for example, if you want to use the same Windows user account in different locations. Profile-specific parameters are then considered during logon.

> ***NOTICE:*** Profile-specific information is always necessary for user logon. Consequently, the **Profile** field may only be masked out in the Logon dialog if only one profile is used. This profile must be created at the first program start after the installation.

- **Language to be selected**
  When you select this option, the login dialog displays the field for selecting a **Language**. Select this setting, for example, if staff members with different native languages operate the OpenScape Desktop Client on the same computer.
- **Configuration Alternatives**
  You can use this setting to specify whether – and if so which – configuration options shall be available to a user when logging on. The following options are available:
  - **Admit Settings and Profile administration**
    The complete list of management features as well as the **Settings** option is displayed in the menu of the **Manage** button when you click on the **Manage** button. The **Add Profile ...** button appears in the Logon dialog in addition.
  - **Hide Settings and Profile administration**
    You cannot access the menu of the **Manage** button. The **Add Profile ...** button is hidden.
  - **Only accept settings**
    The **Settings** entry is displayed in the menu of the **Manage** button after you have clicked on the button. The other management functions are not available. The **Add Profile ...** button is hidden from the Logon dialog.
- Settings for the **LIN mode**
  This option controls how an LIN (*Local Identification Number*) is entered in the Logon dialog. The LIN can be used to pinpoint emergency calls by assigning location numbers to buildings, building section numbers, etc.

> ***NOTICE:*** Please obtain detailed information about configuring an **LIN** number in an HiPath 4000 from the documentation of the respective HiPath 4000 PBX.

The following options are available:

- **Suppressed (no entries)**
  The **LIN** field is not displayed in the Logon dialog.

> ***NOTICE:*** If the **Suppressed (no entries)** option was selected and no password was assigned to the user, the program starts automatically without displaying the Logon dialog.

- **Optional (empty entry field)**
  The **LIN** field appears blank in the Logon dialog and need not be filled in for logging on.
- **Optional (display last entry)**
  The **LIN** field is displayed in the Logon dialog. The LIN from the last logon is set by default. The field need not be filled in for logging on.
- **Mandatory (empty entry field)**
  The **LIN** field appears blank in the Logon dialog and need to be filled in for logging on.
- **Mandatory (display last entry)**
  The **LIN** field is displayed in the Logon dialog. The LIN from the last logon is set by default. The field must be filled in for logging on.

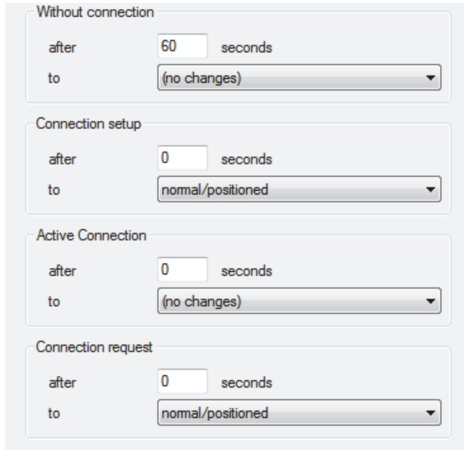
> ***NOTICE:*** If you want to see the Logon dialog every time, but do not wish to assign a password, select the **Optional (empty entry field)** option.

2.3.1.4 Connection Status Change

> ***NOTICE:*** Options for editing settings that change the connection status are only available when activated during login, not when activated during live operation.

Depending on the display mode specified in normal mode you may want the display mode to reflect a change of connection status. For example, if the main window is minimized in connection-free status, you can perform a setting that automatically places the main window back on top in the case of incoming or outgoing calls.

To edit these options, select on the tab **Advanced > General > Change of connection status**. You can define the display mode of the program for any connection status.



The following connection statuses exist:

- **Without connection**
  There is no connection (no connection request, no connection setup, no active connection).
- **Connection setup**
  You set up a connection to another station, for example a call connection, by dialing a phone number.
- **Active Connection**
  There is an active connection. This may be an active call.
- **Connection request**
  You receive a connection request, for example an incoming call.

You can determine how OpenScape Desktop Client displays the single connection statuses in case of a connection status change. The display mode can change to:

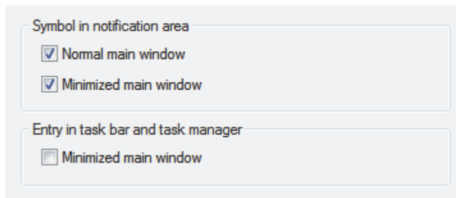
- **(no changes)**
  The current display is not modified.
- **normal/positioned**
  The main window is reset to the active status (normal or positioned) in which it was before it was minimized. The OpenScape Desktop Client reappears on the desktop.
- **minimized/hidden**
  The main window is minimized or hidden. It is hidden if you did not select the icon display in the notification area settings.

The time entered in the **after** field for all connection statuses and all display modes indicates for how many seconds the specified display mode is to be active after a connection status change. This setting ensures that the OpenScape Desktop Client is automatically minimized/hidden again within a certain period after a connection has been terminated.

2.3.1.5 Task Bar and Notification Area

> ***NOTICE:*** Options for editing settings for the Windows task bar and notification area of the Windows task bar are only available after you have activated them when logging on, not when you activate them during operation.

To edit the options for displaying the OpenScape Desktop Client in the Windows taskbar and in the notification area of the Windows taskbar, select on the tab **Advanced > General > Task Bar and Notification Area**.



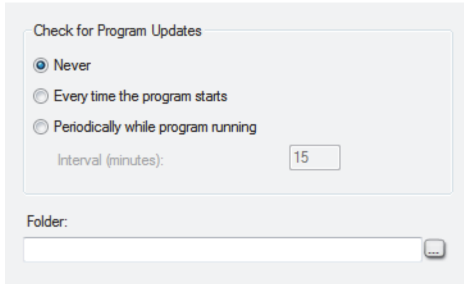
- **Symbol in notification area**
  Depending on the status of the main window you can display an icon (we call it OpenScape icon as we proceed) in the notification area of the Windows task bar.
  - **Normal main window**
    The OpenScape icon is displayed when the main window is not minimized.
  - **Minimized main window**
    The OpenScape icon is displayed when the main window is minimized.
- **Entry in task bar and task manager**
  By activating the **Minimized main window** option you can determine that an entry for the OpenScape Desktop Client is displayed in the task bar and in the task manager of Windows when the main window is minimized.

2.3.1.6 Program Update

> ***NOTICE:*** You find detailed information about the automatic program update of OpenScape Desktop Client in the manual *OpenScape UC Application V7 OpenScape Desktop Client Installation and Administration*.

> ***NOTICE:*** Options for editing program update settings are only available after you have activated them when logging on, not when you activate them during live operation.

On the **Advanced > General > Program Update** tab you can perform various settings to automate the search for updates.



The following options are available for configuring the automatic program update:

- **Never**
  Program updates are never searched for.
- **Every time the program starts**
  When you start the OpenScape Desktop Client, a more recent version is searched for in the memory location specified under **Folder**.
- **Periodically while program running**
  While the OpenScape Desktop Client is being operated, a more recent version is searched for in the memory location specified under **Folder** and during the period defined under **Interval (minutes)**.
- **Interval (minutes)**
  Defines the time interval in which a more recent program version is searched for in case of a periodical check. You specify the time interval in minutes.
- Specify in the **Folder** input field the path to the setup folder under which updated program versions shall be found. You can also click on the browse button **...** and select the desired folder.

NOTICE: If the update folder of the program is stored on another computer in the network, specify the path to the setup folder in the UNC (Uniform Naming Convention) format, for example `\\server name\path`. Before you do that, verify that you have the privileges required for accessing this computer.

2.3.1.7 Central Configuration

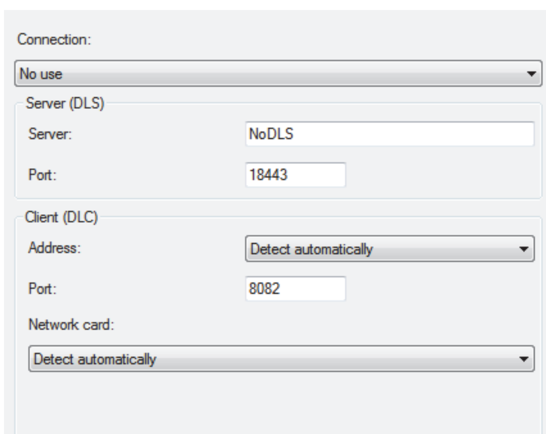
NOTICE: The central configuration settings are entered by default if a central configuration is used during the OpenScape Desktop Client setup.

NOTICE: The options for editing the central configuration settings are only available when activated during the logon procedure, not when activated during operation.

NOTICE: Useful information about necessary DLS settings and functional restrictions on using a central configuration for automatic configuration is contained in the *OpenScape UC Application V7 OpenScape Desktop Client Enterprise Web Embedded Edition Installation and Administration* setup guide.

In cases where a Deployment Service (DLS or central configuration) is available on the network for an installation, the settings for the OpenScape Desktop Client can also be stored centrally. In such cases, the parameters for accessing the central configuration must be entered in the OpenScape Desktop Client, so that the centrally stored parameters can be retrieved.

To edit the settings for the central configuration, select on the tab **Advanced > General > Central Configuration**.



The following settings are required for using the central configuration:

- **Connection**
  If you have configured using a central configuration during the installation, select the required setting under **Connection**. The following options are available:
  - **No use**
    No central configuration.

- **Complete use**
  Complete use of the central configuration.
- **Only for encryption**
  The central configuration is exclusively used for encoding the voice signaling.

- **Server (DLS)**
  Enter the IP address in the **Server** field and the port number of the DLS server in the **Port** field. The DLS port is the port number used for accessing the central server.
- **Client (DLC)**
  - Select the client **Address**. You can either use **Detect automatically** for the entry or select the IP address(es) specified in the client PC configuration. Furthermore, you can enter an IP address manually.

    NOTICE: If you use central configuration here and have multiple network cards and/or multiple IP addresses on a network card, you must deactivate the **Detect automatically** option and manually configure the IP address/MAC address to be used. The IP address/MAC address set here is then transferred to the connected DLS.

  - In the **Port** field, enter the number of the local port under which the OpenScape Desktop Client responds to queries from the central server.
  - In the **Network card** combo box select the network card ID used for DLS-server exchange. The options available here are **Detect automatically** or the network card IDs configured on the PC.

    NOTICE: IDs of network cards no longer available in the computer are listed in brackets ( ).

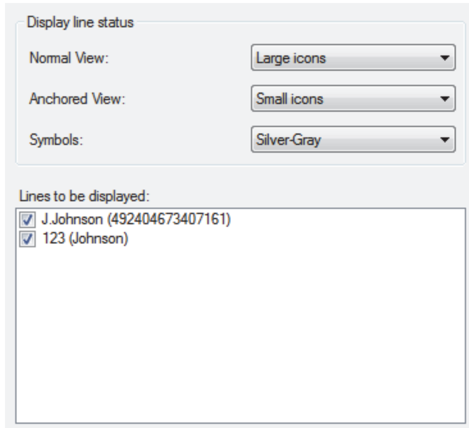
2.3.2 Device State Settings

The **Device State Settings** module provides the phone menu as an element of the Softphone menu. Since no additional settings are required for this module, no editing parameters can be selected.

2.3.2.1 Line Settings

NOTICE: Options for editing line display settings are only available when activated during live operation, not when activated during login.

You define the line display options on the tab **Advanced > Device State > Lines**. You can select the lines you wish to display in the **Lines** window from the list of configured lines:



In the **Display line status** section you can define the icon size (**Large icons** or **Small icons**) for the line options displayed in the **Lines** window.

- **Normal View**
  Select the icon size for the **Lines** window, if it is docked to the main bar or freely positionable.
- **Anchored View**
  Define the icon size in the **Lines** window.
- **Symbols**
  You can also specify whether the symbols in the **Lines** window are to appear in **Gold** or in **Silver-Gray**.

All lines configured in the OpenScape Desktop Client are listed in the **Lines to be displayed** section. Select here the lines to be displayed in the **Lines** window. Only the lines activated here can later be operated in the **Lines** window.

2.3.3 HiPath Provider Settings

> ***NOTICE:*** The **HiPath Provider** module cannot be activated in combination with the **Communication Provider** module.

You perform settings for the **HiPath-Provider** to use the OpenScape Desktop Client as softphone at a HiPath 4000. To edit the **HiPath Provider** settings, select in the left-hand area of the tab **Advanced > HiPath Provider**.

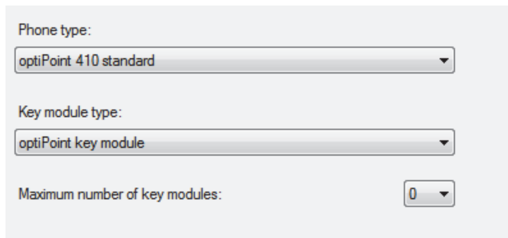
You can configure the following settings for the **HiPath Provider**:

2.3.3.1 Device

NOTICE: To edit the device settings you need to open the **Settings** dialog during the program start. Click on the **Manage** button in the Logon dialog for this purpose.

To display the freephone of OpenScape Desktop Client and the extended keypad, you can choose from various device types for phone and key module.

To set the desired device type, select on the tab **Advanced > HiPath Provider** the **Device** option.



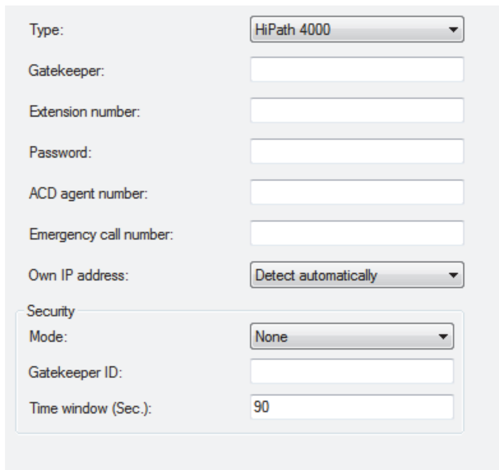
- **Phone type**
  Select your **phone type** in this combo box. Phone type determines also the following properties for the free and integrated phone of OpenScape Desktop Client:
  - Number of display lines shown in the OpenScape Desktop Client freephone (in the integrated phone of the main bar always two display lines are shown).
  - Availability of Electronic Key Labeling (EKL) to the OpenScape Desktop Client.
  - Number of feature keys available in the free and integrated telephone of OpenScape Desktop Client.
  - Number of feature keys available in the extended keypad of OpenScape Desktop Client.
- **Key module type**
  This combo box lets you define the type of your key module and determine the following key module properties:
  - Availability of Electronic Key Labeling (EKL) to the key module columns in the extended keypad.
  - Number of programmable feature keys available in the key module columns of the extended keypad in OpenScape Desktop Client.
- **Maximum number of key modules**
  This combo box specifies how many key module columns are displayed in the extended keypad at the most. Possible values range from `0` to `4`. Value `0` means that the extended keypad remains empty, and `4` means that a maximum of four key module columns is displayed in the extended keypad.

2.3.3.2 Main Connection

> ***NOTICE:*** To edit the main connection settings you need to open the **Settings** dialog during the program start. Click on the **Manage** button in the login dialog for this purpose.

The main connection configuration defines the connection properties between OpenScape Desktop Client and the main communications system.

To configure the failover parameters, select on the tab **Advanced > HiPath Provider** the **Main connection** option.



- **Type**
  Select the **HiPath 4000** option in this field.
- **Gatekeeper**
  Enter the IP address of the communications system gatekeeper.
- **Extension number**
  Enter the number under which you can be reached on the connected communications system.
- **Password**
  Specify the password configured for your extension number.
- **ACD agent number**
  If available, enter your ACD agent number.
- **Emergency call number**
  Specify the emergency call number. Your system administrator will provide information on this.
- **Own IP address**
  Via this combo box you familiarize the OpenScape Desktop Client with the **own IP address**.
  – If an own IP address is assigned to the network card of the user computer, select the **Detect automatically** setting here.

– If several IP addresses are assigned to the network board of the user computer, they are all listed in this combo box. Select the desired IP address.

In the **Security** section you can perform the following settings:

- **Mode**
  From this combo box you can select the security mode that is also selected as security mode on the connected communications system.
- **Gatekeeper ID**
  Specify the Gatekeeper ID already configured on your PBX.
- **Time window (Sec.)**
  Under this option you can enter the time in seconds. Your system administrator will provide information on this.

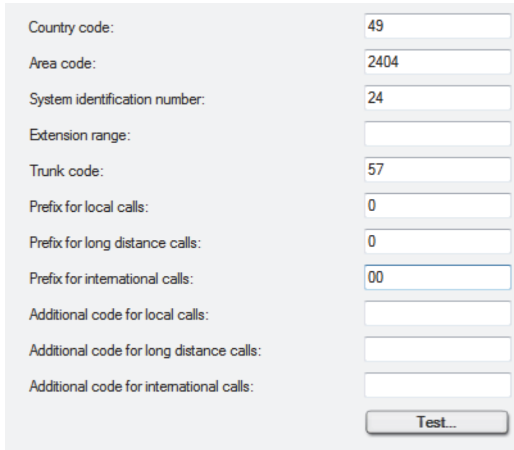
NOTICE: You can obtain more detailed information about these parameters from your system administrator.

2.3.3.3 Main Network Access

NOTICE: To edit the main network access settings you need to open the **Settings** dialog during the program start. Click on the **Manage** button in the Logon dialog for this purpose.

Network access settings must be entered when call number normalization is active. Network access settings (location information) are needed for setting up a direct connection to telephone numbers from OpenScape Desktop Client directories or call lists. These settings are also used for converting call numbers into the internationally dialable format. If these settings are not configured properly, you may encounter problems when setting up connections. Network access settings are not needed when call number normalization is inactive.

Select the **HiPath Provider** option on the **Advanced** tab and open the **Main network access** dialog to configure the network access settings. The parameters you see in the figure are only examples.



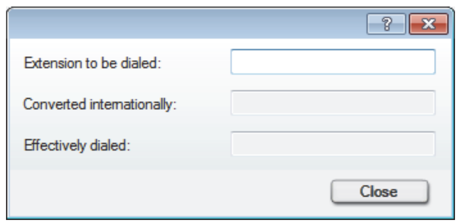
- **Country code**
  Enter here the international prefix for your location, for example `49` for Germany.
- **Area code**
  Enter here the telephone prefix for your location in the national phone number scope. Omit the leading zero for this entry.
- **System identification number**
  Enter the system identification number. This system ID number identifies internal call numbers in the directories that only set up internal connections when selected.
- **Extension range**
  Specify the extension range of your network in the form of a *regular expression.*
  Example:
  You have been assigned the system identification number with the numbers 0049 35 12345-2000 to 0049 35 12345-4999. In this case the extension range reads 2000 to 4999. Enter the following in the **Extension range** field for these phone numbers: `\b[2-4][0-9]{3}\b`.
  – \b - the number must begin with a blank
  – [2-4] - the first digit may be a character between 2 and 4 inclusive, thus 2, 3, 4
  – [0-9]{3} - for the next three digits, numbers 0 to 9 are allowed
  – \b - the number must end with a blank
- **Trunk code**
  Enter here the code that has been configured on your system or on your PBX to allocate trunks for outgoing connections.
- **Prefix for local calls, Prefix for long distance calls, Prefix for international calls**
  Enter the network operator ID for the respective call type in the corresponding fields. For example, in Germany no **Prefix for local calls** is used, while for other countries in Europe and members of the NANP (North American

Numbering Plan) the zero is used to mark local calls. In Germany, for example, the **prefix for long distance calls** is `0` and the **prefix for international calls** is `00`. This data is independent from the configuration of the connected communications system and determined by the network operator.

- **Additional code for local calls, Additional code for long distance calls, Additional code for international calls**
  Enter additional digits to be used as call-by-call prefixes in the respective fields. This data is independent from the configuration of the connected communications system.
  The sequence of the various codes is as follows:
  <office code><additional code><prefix><phone number>

Test

Click on the **Test...** button to open the following dialog and test your entries.



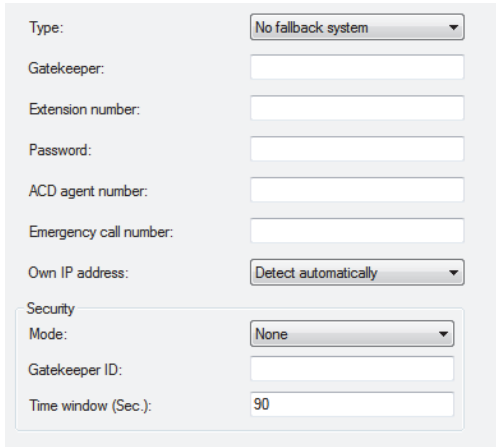
- **Extension to be dialed**
  Enter the number to be dialed in this entry field. Based on the currently set parameters the OpenScape Desktop Client determines the phone number in international format.
- **Converted internationally**
  The phone number entered in the above field is automatically displayed in this field.
- **Effectively dialed**
  This field displays automatically the actually dialed number. Depending on the set network access parameters the number may be shorter, for example, if an internal phone number has been recognized.

2.3.3.4 Fallback Connection

> ***NOTICE:*** To edit the fallback connection settings you need to open the **Settings** dialog during the program start. Click on the **Manage** button in the Logon dialog for this purpose.

> ***NOTICE:*** You only need to perform the fallback system settings if you operate the OpenScape Desktop Client with a fallback system. The configuration of the fallback connection defines the connection properties between the OpenScape Desktop Client and the fallback communications system.

To configure the failover parameters, select on the tab **Advanced > HiPath Provider** the **Fallback connection** option.



- **Type**
  Select the fallback system type in this combo box. The following options are available: **No fallback system** and **HiPath 4000**.

> ***NOTICE:*** The significance of the further parameters for the fallback connection corresponds to the significance of the parameters for the main connection. They do not, however, refer to the main but to the fallback communications system.

- **Gatekeeper**
  Enter the IP address of the fallback system gatekeeper in this field.
- **Extension number**
  Enter the number under which you can be reached on the fallback system in this field.
- **Password**
  Specify the password configured for your extension number on the fallback system in this field.
- **ACD agent number**
  If available, enter your ACD agent number.
- **Emergency call number**
  Specify the emergency call number. Your system administrator will provide information on this.
- **Own IP address**
  Select your own IP address or **Detect automatically** in this combo box.

In the **Security** section you can perform the following settings:

- **Mode**
  From this combo box you can select the security mode that is also selected as security mode on the connected communications system.
- **Gatekeeper ID**
  Specify the Gatekeeper ID already configured on your PBX.

- **Time window**
  Under this option you can enter the time in seconds. Your system administrator will provide information on this.

> ***NOTICE:*** You can obtain more detailed information about these parameters from your system administrator.

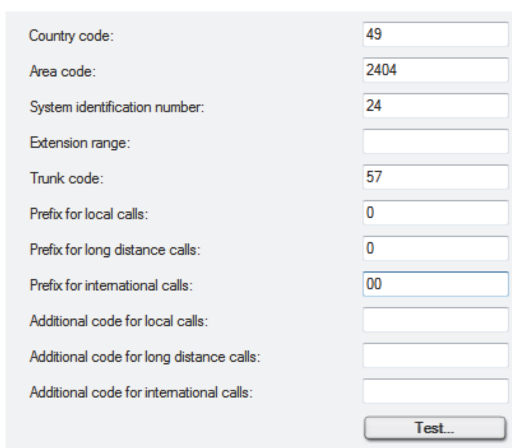
2.3.3.5 Fallback Network Access

> ***NOTICE:*** To edit the fallback network access settings you need to open the **Settings** dialog during the program start. Click on the **Manage** button in the Logon dialog for this purpose.

> ***NOTICE:*** You only need to perform the fallback network access settings if you operate the OpenScape Desktop Client with a fallback system.

Select on the tab **Advanced > HiPath Provider** the **Fallback network access** option to configure the fallback network access settings. The parameters you see in the figure are only examples.

> ***NOTICE:*** The settings of the fallback network access parameters correspond to those for the main network access but do not refer to the main but to the fallback communications system.

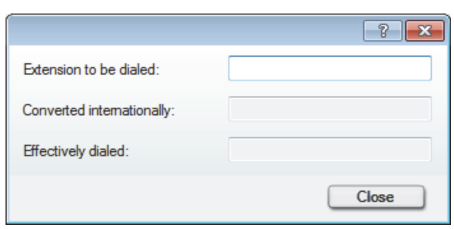


- **Country code**
  Enter here the international prefix for your location, for example `49` for Germany.
- **Area code**
  Enter here the telephone prefix for your location in the national phone number scope. Omit the leading zero for this entry.

- **System identification number**
  Enter the system identification number. This system ID number identifies internal call numbers in the directories that only set up internal connections when selected.
- **Extension range**
  Specify the extension range of your network in the form of a *regular expression.*
  Example:
  You have been assigned the system identification number with the numbers 0049 35 12345-2000 to 0049 35 12345-4999. In this case the extension range reads 2000 to 4999. Enter the following in the **Extension range** field for these phone numbers: `\b[2-4][0-9]{3}\b`.
  – \b - the number must begin with a blank
  – [2-4] - the first digit may be a character between 2 and 4 inclusive, thus 2, 3, 4
  – [0-9]{3} - for the next three digits, numbers 0 to 9 are allowed
  – \b - the number must end with a blank
- **Trunk code**
  Enter here the code that has been configured on your system or on your PBX to allocate trunks for outgoing connections.
- **Prefix for local calls/long distance calls/international calls**
  Enter the network operator ID for the respective call type in the corresponding fields. For example, in Germany no **Prefix for local calls** is used, while for other countries in Europe and members of the NANP (North American Numbering Plan) the zero is used to mark local calls. For example, in Germany the **prefix for long distance calls** is `0` and the **prefix for international calls** is `00`. This data is independent from the configuration of the connected communications system and determined by the network operator.
- **Additional code for local calls/long distance calls/international calls**
  Enter the additional digits to be used as call-by-call prefixes in the fields. This data is independent from the configuration of the connected communications system.
  The sequence of the various codes is as follows:
  <office code><additional code><prefix><phone number>

Test

Click on the **Test...** button to open the following dialog and test your entries.



- **Extension to be dialed**
  Enter the number to be dialed in this entry field. Based on the currently set parameters the OpenScape Desktop Client determines the phone number in international format.

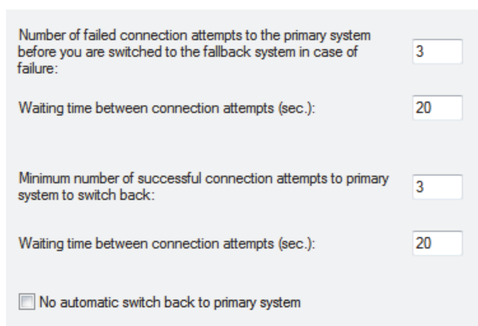
- **Converted internationally**
  The phone number entered in the above field is automatically displayed in this field.
- **Effectively dialed**
  This field displays automatically the actually dialed number. Depending on the set network access parameters the number may be shorter, for example, if an internal phone number has been recognized.

2.3.3.6 Failover

NOTICE: To edit the failover settings you need to open the **Settings** dialog during the program start. Click on the **Manage** button in the Logon dialog for this purpose.

If you use the OpenScape Desktop Client with a failover communications system, then OpenScape Desktop Client will be automatically switched to the specified fallback communications system if the main communications system fails. After this switch, OpenScape Desktop Client attempts in regular intervals to reach and reconnect to the main communications system.

To configure the failover parameters, select on the tab **Advanced > HiPath Provider** the **Failover** option.



Determine the values for the following parameters:

- Under **Number of failed connection attempts to the primary system before you are switched to the fallback system in case of failure** you specify after how many failed connection attempts OpenScape Desktop Client will switch from the main to the fallback communications system.
- Under **Waiting time between connection attempts (sec)** you specify in which intervals the OpenScape Desktop Client attempts to reach the main communications system again.
- Under **Minimum number of successful connection attempts to primary system to switch back** you specify after how many successful connection attempts the main communications system is to be considered operable again. The OpenScape Desktop Client will not switch back to the main communications system until it is considered operable.

- Under **Waiting time between connection attempts** you specify in which intervals the OpenScape Desktop Client attempts to reach the main communications system again.
- With the **No automatic switch back to primary system** option you determine whether OpenScape Desktop Client automatically switches back to the main communication system as soon as it is operable again. If you activate the check box of this option, the OpenScape Desktop Client does not automatically switch back to the main communications system.

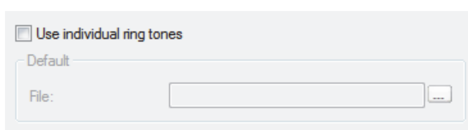
2.3.3.7 Ring Tones

Alternatively to the default ring tones determined by the ring tone color set in the PBX, you can select an individual ring tone for signaling incoming calls. Compatible ring tone files must comply with the following requirements:

- The ring tone file must be available in `WAV` or `MP3` format.
- The file size must not exceed 2 MB. If you configure a bigger ring tone file as ring tone, only the first 2 MB of this file are played.

To configure an individual ring tone, select on the tab **Advanced > HiPath Provider > Ring tones**.

> ***NOTICE:*** You can edit the settings for the individual ring tone in the **Settings** dialog during the program start or during live operation. Click on the **Manage** button in the Logon dialog or select in the **Pearl menu > Personal Settings > Ring Tones**.



- Via the **Use individual ring tones** option you activate an individual ring tone. After you have activated this option, the OpenScape Desktop Client uses the tone specified under **File** to signal incoming calls.
- Under **File** you define the `WAV` or `MP3` file that contains the desired ring tone. Via the browse button **...** you can look for the desired file.

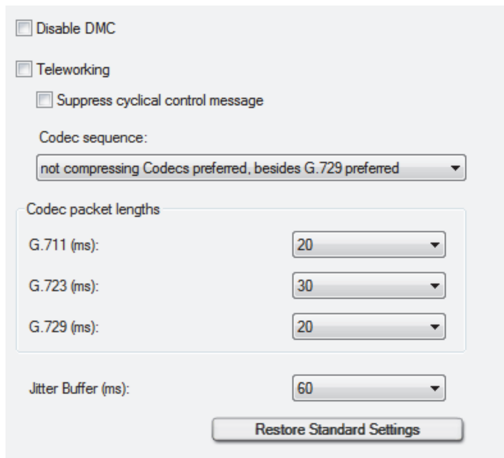
> ***NOTICE:*** OpenScape Desktop Client copies the content of the selected `WAV` or `MP3` file. In this way the ring tone is still available even if the original sound file is deleted.

2.3.3.8 Bandwith Reduction

> ***NOTICE:*** To edit the bandwith reduction settings you need to open the **Settings** dialog during the program start. Click on the **Manage** button in the Logon dialog for this purpose.

You can optimize the voice transmission quality by adjusting various settings to the current environment of your network setup.

To configure the voice transmission parameters, select on the tab **Advanced > HiPath Provider > Bandwidth reduction**.



The OpenScape Desktop Client displays the default settings. Do not change them without instructions from your system administrator.

- **Disable DMC**
  If you operate the OpenScape Desktop Client with a HiPath 4000 PBX, voice packets are directly exchanged between the communication partners via the network (Direct Media Connect - DMC). If required, you can deactivate this behavior by disabling this check box. This will stop the direct exchange of voice packets between the communication partners. You can activate this option if you operate the OpenScape Desktop Client for example from a home office.
- **Teleworking**
  If you work at home, activate the Teleworking check box. This sets the **Suppress cyclical control message** check box automatically. In this way you reduce the data volume on the trunk line and thus the bandwidth demand in teleworking mode.

> ***NOTICE:*** You need to disable this option to operate the OpenScape Desktop Client at an OpenScape Voice/Cisco proxy, since the communications system cannot send any busy-lamp field (BLF) messages.

- **Codec sequence**
  Communication between the OpenScape Desktop Client and the communications system is based on defined compression algorithms (codecs) for the network transmission of audio signals via the network. Using this combo box you can determine the sequence of the codecs for the voice connection.
  Select the setting suitable for your location in the **Codec sequence** combo box.

> ***NOTICE:*** When you activate the **Teleworking** option, a different selection is available.

- **Codec packet lengths**
  The respective voice packet lengths for the codecs **G.711**, **G.723** and **G.729** are individually defined in milliseconds in this section.
  Select a value in each of the three codecs' combo boxes. The values are indicated in milliseconds (ms).
- **Jitter Buffer (ms)**
  To avoid voice packet loss, which can result in poor voice quality and dropouts, set the buffer size in this field. The jitter buffer caches all incoming voice packets for the period set and then forwards them to the audio device’s sound output. The jitter buffer continues to forward voice packets until none are left, even if the network does not deliver new voice packets quickly enough. This avoids dropouts.
  Select a value in the **Jitter Buffer (ms)** combo box. The values are indicated in milliseconds (ms).

Specialties upon selecting the jitter buffer

When selecting the optimum setting for the jitter buffer please note the following:

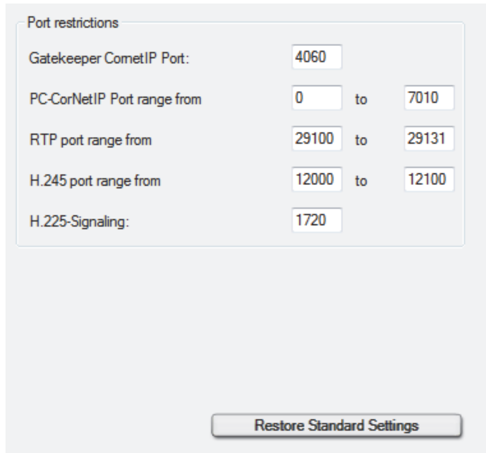
- The better the network quality, the smaller the jitter buffer may be.
- The bigger the jitter buffer, the more the voice transmission will be delayed.
- We recommend to set the jitter buffer to value `60`.

With a click on the **Restore Standard Settings** button you can reset the values to the default settings.

2.3.3.9 Port Restrictions

> ***NOTICE:*** To edit the port restrictions settings you need to open the **Settings** dialog during the program start. Click on the **Manage** button in the Logon dialog for this purpose.

To determine the port restrictions in firewall environments, select on the tab **Advanced > HiPath Provider > Port restrictions**.



The OpenScape Desktop Client displays the default settings. Do not change them without instructions from your system administrator.

- **Gatekeeper CornetIP Port**
  The communications port, which supports signaling and voice connections for CorNet-IP via a gatekeeper, is defined by activating this field.
- **PC-CorNetIP Port range from/to**
  The communications ports, which support signaling and voice connections between a PC and CorNet-IP, are defined by activating the fields **from** and **to** of the **PC-CorNetIP Port range** option.
- **RTP port range from/to**
  In these input fields you specify the values that define the range of the **RTP** ports used for signaling and voice connections.
- **H.245 port range from/to**
  In these input fields you specify the values that define the range of the **H.245** ports used for signaling and voice connections.
- **H.225-Signaling**
  In this input field you specify the value used for the signaling connections.

> ***NOTICE:*** If no voice transmission is possible during operation despite a correct logon, make sure that the RTP port range is configured between `1024` and `65353`.

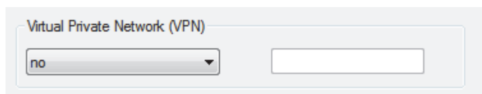
- With a click on the **Restore Standard Settings** button you can reset the values to the default settings.

2.3.3.10 VPN

NOTICE: To edit the VPN (Virtual Private Network) settings you need to open the **Settings** dialog during the program start. Click on the **Manage** button in the Logon dialog for this purpose.

The OpenScape Desktop Client informs its active connection partners at specific times about the individual IP address – for example to address the audio packets correctly. For this purpose, OpenScape Desktop Client needs to know the current IP address, respectively, how it can be determined.

Under **Advanced > HiPath Provider > VPN** you can define the behavior of the OpenScape Desktop Client in a VPN (Virtual Private Network).



Virtual Private Network (VPN)

In this combo box you define whether or not you have a VPN. The following settings can be made:

- **none** – No VPN is used or you use a VPN where the VPN client provides a virtual network adapter for the VPN tunnel.
- **automatic** – VPN is used, the IP address is determined by the OpenScape Desktop Client.

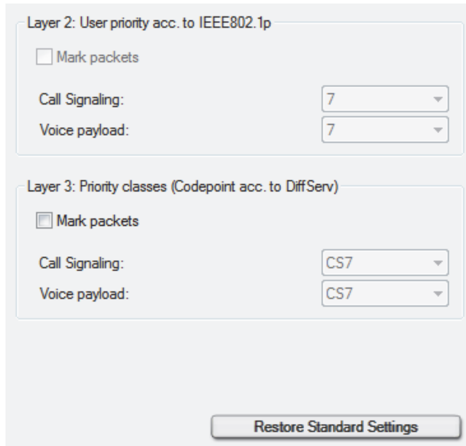
NOTICE: If the VPN client does not provide a virtual network adapter on the PC on which the OpenScape Desktop Client is installed, you need to select the **automatic** option.

- **manual** – You need to enter the IP address of the OpenScape Desktop Client assigned by the VPN in the corresponding field.

2.3.3.11 Quality of Service (QoS)

IMPORTANT: Deploying the QoS service requires a QoS Packet Scheduler being active for the connection used.

If you wish to modify the QoS settings, select on the tab **Advanced > HiPath Provider > Quality of Service (QoS)**.



For the transmission level **Layer 2: User Priority acc. to IEEE802.1p** and **Layer 3: Priority classes (Codepoint acc. to DiffServ)** you can use the **Mark Packets** option to individually define whether the data of the traffic types **Call Signaling** and **Voice payload** is furnished with the respectively set QoS values.

The QoS settings depend on the operating system used.

- **Layer 2: User priority acc. to IEEE802.1p**
  - Under Microsoft Windows XP Professional SP2 and later you cannot perform any settings for **Layer 2**.
  - Under Microsoft Windows Vista/7 you cannot perform any settings for **Layer 2**. The configuration of the **Mark Packets** option is automatically adjusted to the setting for **Layer 3**.
- **Layer 3: Priority classes (Codepoint acc. to DiffServ)**
  - Under Microsoft Windows XP Professional SP2 and later you can set the QoS values for the traffic types **Call Signaling** and **Voice payload** individually. The default value for the traffic type **Call Signaling** is `AF31` and for **Voice payload** `EF`.
  - Under Microsoft Windows Vista/7 you can only activate/deactivate the **Mark Packets** option. The operating system defines the combo boxes **Call Signaling** and **Voice payload** automatically via the new network platform qWAVE (Quality Windows Audio/Video Experience) for audio and video streaming applications in private IP networks. TrafficTypes are used instead of **Codepoint acc. to DiffServ** . The TrafficType for call signalling is QOSTrafficTypeControl, which corresponds to the **CodePoint acc. to DiffServ** `0x38 (CS7)`. The TrafficType for voice and video data is QOSTrafficTypeVoice, which corresponds to the **CodePoint acc. to DiffServ** `0x38 (CS7)`. The combo boxes **Call Signaling** and **Voice payload** are therefore default set with value `CS7` and cannot be changed.

- **Restore Standard Settings**
  Click on this button if you want to reset the QoS settings to the default values.

> ***NOTICE:*** On a computer with Intel Centrino Duo processor, OpenScape Desktop Client will detect this automatically at runtime. In this case the OpenScape Desktop Client uses the QoS support provided by the Intel Centrino Duo processor.

> ***NOTICE:*** The computer needs to be rebooted for the QoS settings changes to become active.

2.3.3.12 Operation Settings

> ***NOTICE:*** The **Operation settings** entry is only available when you invoke the **Settings** dialog with a started OpenScape Desktop Client. Select the **OpenScape Options** item in the context menu of the Windows taskbar for this purpose.

If you use default ring tones, you can change the pitch of the ring tone in the operation settings. Select on the tab **Advanced > HiPath Provider > Operation settings**.

> ***NOTICE:*** This feature is not available when you have selected an individual ring tone.

You can use the **Change Ring Tone** button to modify the ringer pitch of the default ring tones.

You hear the ring tone currently set. Via the **Next ring tone** and **Previous ring tone** buttons you can set the ringer pitch individually. A click on **Close** closes the configuration dialog for these settings. The setting you have selected last is immediately active.

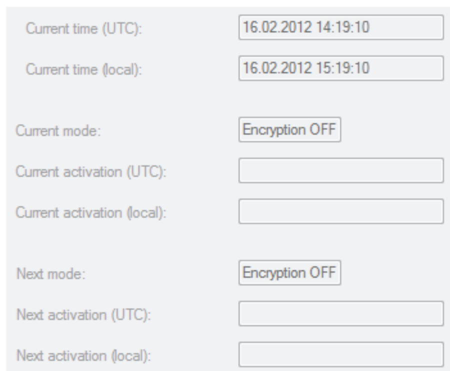
2.3.3.13 Security

> ***NOTICE:*** These settings are centrally configured and cannot be modified in the OpenScape Desktop Client. More details about how to display these settings is provided in the manual *OpenScape UC Application V7 OpenScape Desktop Client Installation and Administration*.

If the system times of the OpenScape Desktop Client and the PBX are not identical or differ from each other too much, signaling and voice encryption may cause problems during login or connection setup. You can use the security settings to compare the system times and detect time zone errors. Furthermore, you can determine if and when the code was changed last.

> ***NOTICE:*** These settings are centrally configured and cannot be modified in the OpenScape Desktop Client.

After the **HiPath Provider** module has been activated and the OpenScape Desktop Client started, click the **OpenScape Options** button to see the **Security** entry on the tab **Advanced > HiPath Provider**.



- **Current time (UTC)**
  These settings correspond to the current system time (`tt.mm.jjjj hh:mm:ss`) of the OpenScape Desktop Client PC in UTC (= GMT).
- **Current time (local)**
  These settings correspond to the current system time (`tt.mm.jjjj hh:mm:ss`) of the OpenScape Desktop Client PC in local time.
- **Current mode**
  The entry in this field specifies whether the encryption is active (`Encryption ON`) or inactive (`Encryption OFF`).
- **Current activation (UTC)**
  This input field specifies the time when the current mode was activated in UTC (= GMT).
- **Current activation (local)**
  This input field specifies the time when the current mode was activated in local time.
- **Next mode**
  The next applicable encryption mode is displayed in this field.
- **Next activation (UTC)**
  This input field specifies the time when the next mode was activated in UTC (= GMT).

- **Next activation (local)**
  This input field specifies the time when the next mode was activated in local time.

> ***NOTICE:*** If you operate the OpenScape Desktop Client without central configuration, signaling and voice data is usually unencrypted.

2.3.4 SIP Service Provider Settings

> ***NOTICE:*** To edit the SIP Service Provider settings you need to open the **Settings** dialog during the program start. Click on the **Manage** button in the Logon dialog for this purpose.

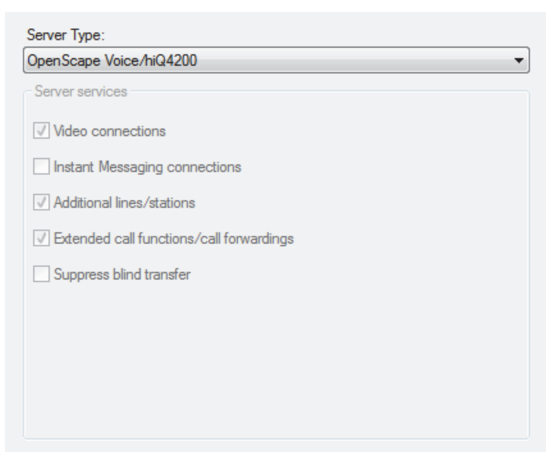
By setting the SIP Service Provider you configure the OpenScape Desktop Client for being used as softphone at an SIP communications system.

> ***IMPORTANT:*** OpenScape Desktop Client Enterprise Web Embedded Edition must not be used as SIP softphone in a terminal server environment.

To edit the SIP Service Provider settings, select on the tab **Advanced > SIP Service Provider**. Then click on one of the following settings.

2.3.4.1 System Services

Select under **Advanced > SIP Service Provider > System Services** the server type with which the OpenScape Desktop Client is connected.



Server Type

- **OpenScape Voice/hiQ4200**
  Select this server type if the OpenScape Desktop Client is connected to an OpenScape Voice or a hiQ4200.
- **OpenScape Voice/hiQ4200 without video**
  Select this server type if the OpenScape Desktop Client is connected to an OpenScape Voice or a hiQ4200 without video support.
- **HiPath 3000/OpenOffice EE**
  Select this server type if the OpenScape Desktop Client is connected to this server.
- **HiPath 3000 >=V8**
  Select this server type if the OpenScape Desktop Client is connected to an HiPath or later.
- **HiPath 4000 >=V6**
  Select this server type if the OpenScape Desktop Client is connected to an HiPath 4000 or later.
- **Default without Video/Instant Messaging**
  Select this server type if the OpenScape Desktop Client is connected to any SIP-protocol-based SIP server. In this case the video and instant-messaging features are not supported.
- **Custom**
  If you select this server type, you can individually activate the support for the following features for the connected communications system (if available):

Server services

- **Video connections**
  Enables connections for exchanging video images.
- **Instant Messaging connections**
  Enables connections for exchanging instant messages.
- **Additional lines/stations**
  Enables the **Lines** module window.
- **Extended call functions/call forwardings**
  Enables extended features and functions, such as Transfer.
- **Suppress blind transfer**
  The "Blind Transfer" feature (**transfer to** a device or subscriber) is not supported by this PBX.

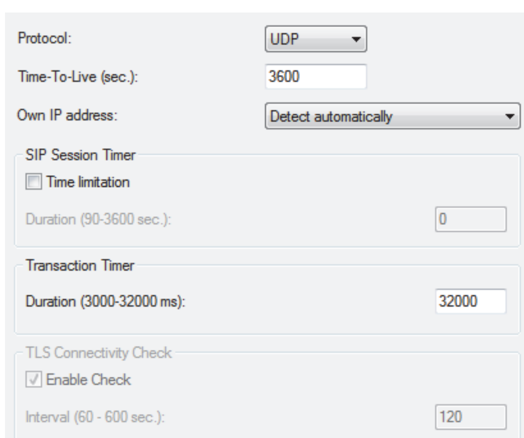
You determine the number of supported features (**server services**) by selecting the relevant option in the **Server Type** combo box. The user cannot change this. The following table shows which features are supported by which server type.

Server Type	Server Services
OpenScape Voice/hiQ4200	• Video connections • Additional lines/stations • Extended call functions/call forwardings
OpenScape Voice/hiQ4200 without video	• Additional lines/stations • Extended call functions/call forwardings
HiPath 3000/OpenOffice EE	None of the listed services is supported.
HiPath 3000 >=V8	• Video connections • Suppress blind transfer
HiPath 4000 >=V6	• Video connections • Suppress blind transfer
Default without Video/Instant Messaging	None of the listed services is supported.
Custom	You can individually activate the support of the features for the connected communications system (if available):

> ***NOTICE:*** If a listed server service is active, the associated features and elements such as buttons, menu options, module windows, etc. are also active in the OpenScape Desktop Client. These controls are unavailable or inactive if the associated server service is not active.

2.3.4.2 Connection

Select the entry **Advanced > SIP Service Provider > Connection**. Enter the different connection settings for the OpenScape Desktop Client at the connected communications system.



- **Protocol**
  Select the transport type for the transport protocol. The available options are `UDP`, `TCP`, and `TLS`.
  If you operate OpenScape Desktop Client at an OpenScape Voice with connection to an OpenScape Media Server, tones, announcements and conference data can be transmitted encrypted via the *SRTP* protocol. In this process, the keys for data encryption are negotiated on the basis of the *SDES* security model and exchanged via the SIP connection. It is therefore important to select the **TLS** protocol for such connections at this point of the **SIP Service Provider** configuration.

  > ***IMPORTANT:*** Furthermore, you need to set **Port** `5061` in the **SIP Signaling** section under **Advanced > SIP Service Provider > Port restrictions**.

  > ***NOTICE:*** Encrypted data transmission is also possible when operating in *Restricted Mode*.

  > ***NOTICE:*** You find more information about data encryption in the *OpenScape UC Application V7 OpenScape Desktop Client Enterprise Web Embedded Edition Installation and Administration* manual.

- **Time-To-Live (sec.)**
  This is an SIP-specific timer for some kind of heartbeat procedure: So that the SIP server does not put an inactive subscriber out of action, the OpenScape Desktop Client needs to register with the SIP server in intervals specified in the Time-To-Live (sec.) field.

  > ***IMPORTANT:*** This value should only be modified by your system administrator.

- **Own IP address**
  The Own IP address must be known for the IP connection of the OpenScape Desktop Client. If the OpenScape Desktop Client is connected to a network adapter to which a unique IP address has been assigned, select the **Detect automatically** setting. If the network card is assigned multiple IP addresses or if the network card cannot be reached directly, for example, via the ACME/ Session Border Controller, all addresses are listed in the list box and you can select the required one.

SIP Session Timer

- **Time limitation**
  Activate this option to specify whether the validity of active sessions shall be monitored with help of heartbeat procedures.

- **Duration (90-3600 sec.)**
  Specify here the duration of the timer in seconds (admissible range `90 - 3600 sec.`). Value `0` means the timer is off.

Transaction Timer

- **Duration (3000-32000 ms)**
  The OpenScape Desktop Client expects a response from the SIP server to its SIP request (for example when setting up an SIP connection) within this period. The default value set for this parameter is `32000` ms. When this period has expired and the OpenScape Desktop Client has not yet received an answer from the SIP server, an error message is generated. An example is the error message "Request Timeout", in the case that the network can be reached but the SIP server temporarily or permanently cannot.

> ***NOTICE:*** The required details are provided by your administrator or PBX administrator.

TLS Connectivity Check

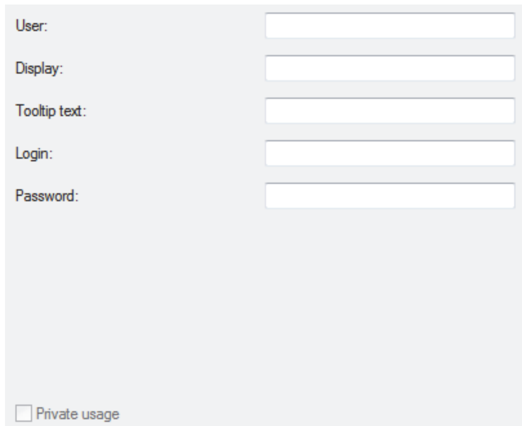
If OpenScape Desktop Client is connected to an OpenScape Voice via the TLS protocol, the connection to the PBX can be checked regularly. As soon as a connection breakdown has been detected, the program attempts automatically to re-establish the connection to the PBX.

> ***NOTICE:*** You can change the settings for monitoring the TLS connection to the OpenScape Voice after you have selected the **TLS** option under **Protocol**.

- **Enable Check**
  If a tick is placed in the **Enable Check** check box (default settings), monitoring the TLS connection is active.
- **Interval (60 - 600 sec.)**
  With this parameter you can define an interval of 60 sec. to 600 sec. in which the TLS connection to the OpenScape Voice is checked for being established. The default value is 120 sec.

2.3.4.3 Main Line

Select **Advanced > SIP Service Provider > Main line** for defining the parameters for the main line of the OpenScape Desktop Client.

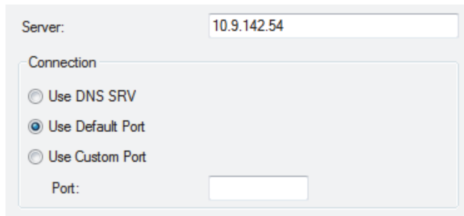


> ***NOTICE:*** The administrator of your SIP communications system provides you with the required details.

- **User**
  Enter the unique OpenScape Desktop Client phone number/user address.
- **Display**
  Enter the complete name. The text is transmitted as subscriber name to your connection partners and displayed in the caption bar of the main window as well as in the **Video** screen.
- **Tooltip text**
  If you use the OpenScape Desktop Client Enterprise Web Embedded Edition, this input field has no function.
- **Login**
  Enter here your SIP ID that has been configured for authentication at the SIP communications system.
- **Password**
  Enter here the SIP password that has been configured for the SIP ID specified under **Login**.
- **Private usage**
  When using the OpenScape Desktop Client Enterprise Web Embedded Edition this check box has no function and cannot be ticked off.

2.3.4.4 Registrar

Select under **Advanced > SIP Service Provider > Registrar** to define the parameters for the registrar portion of the SIP server.



- **Server**
  Enter the IP address or server name of the registrar portion of the SIP server.

> ***NOTICE:*** The necessary details can be obtained from the system administrator.

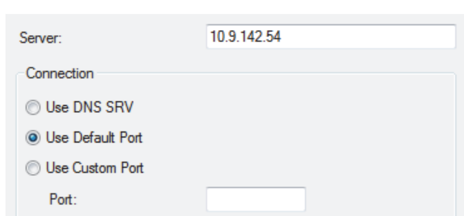
In the **Connection** section you can define the port number for the server connection:

- **Use DNS SRV**
  If this option is active, the settings for the registrar portion of the SIP server are determined by a DNS service. In this case, enter the domain name of the registrar portion of the server under **Server**.
- **Use Default Port**
  Depending on the selected transport type, this option for the connection to the registrar portion of the server is active by default.
- **Use Custom Port**
  If you select this option, you must enter the port number under **Port**.

> ***NOTICE:*** The necessary details can be obtained from the system administrator.

2.3.4.5 Proxy

Select under **Advanced > SIP Service Provider > Proxy** to define the parameters for the proxy portion of the SIP server.



- **Server**
  Enter the IP address or server name of the proxy portion of the SIP server.

> ***NOTICE:*** The necessary details can be obtained from the system administrator.

In the **Connection** section you can define the port number for the server connection:

- **Use DNS SRV**
  If this option is active, the settings for the proxy portion of the SIP server are determined by a DNS service. In this case, enter the domain name of the proxy portion of the server under **Server**.
- **Use Default Port**
  Depending on the selected transport type, this option for the connection to the proxy portion of the server is active by default.
- **Use Custom Port**
  If you select this option, you must enter the port number under **Port**.

> ***NOTICE:*** The necessary details can be obtained from the system administrator.

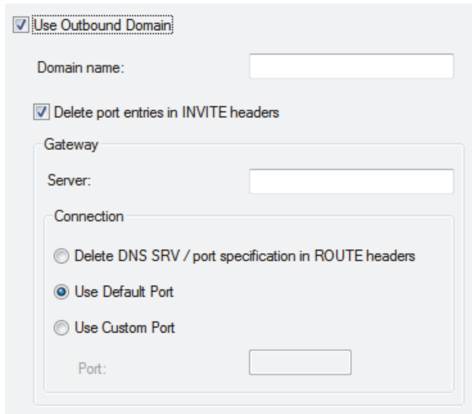
2.3.4.6 Outbound Domain

An outbound domain (outbound proxy server) is used, for example, for a (*Survivable Branch Office Solution*) with an OpenScape Voice. In this case the survivability is provided by an extra proxy component of the SIP server (survivable SIP proxy, for example *Comdasys Convergence*). A survivable SIP proxy (gateway) offers restricted SIP server functions (restricted operation mode), as soon as it realizes that the OpenScape Voice cannot be reached. The Softphone menu signals the restricted operation mode by the icon. Operation is not interrupted.

> ***NOTICE:*** *Survivability* describes here the ability of the communications network to maintain the service for network subscribers even in case of existing errors in the network. You find detailed information about *Survivability* in the administrator manual of the OpenScape Voice V4R1 or V5.

Using an outbound domain enables you to make calls without having to specify the complete SIP addresses (SIP URIs/SIP phone numbers) when dialing. For example, the SIP phone number to be dialed reads: `sip:0123456789@Domain Name`. You can enter only `0123456789` in the **<Name or Number>** input field in the main menu. The SIP communications system completes the SIP phone number to the dialed.

Select the entry **Advanced > SIP Service Provider > Outbound Domain** to define the parameters for the outbound domain and the SIP gateway server.



- **Use Outbound Domain**
  Activate this option so that you can fill in the fields in this dialog.

> ***NOTICE:*** This check box must be ticked for connecting the OpenScape Desktop Client to an OpenScape Voice in the central as well as in a branch office.

- **Domain name**
  Enter the name of your outbound domain in this input field. The SIP communications system automatically completes it in the phone number to be dialed before the connection is set up.

> ***NOTICE:*** Leave this input field empty for connecting the OpenScape Desktop Client to an OpenScape Voice with a survivable branch solution in the central as well as in a branch office.

- **Delete port entries in INVITE headers**
  Activating this option removes the ports from the INVITE headers for the specfied domain names. This is necessary, for example, in the case of ACME/ Session Border Controller configurations.

- If, for example, OpenScape Desktop Client is used with an OpenScape Voice in a survivable branch solution (for example OpenScape Branch), enter the IP address or the server name of the gateway server or of the Survivable SIP Proxy in the **Server** field of the **Gateway** section.

> ***NOTICE:*** You need to set the IP address or the server name of the Survivable SIP Proxy also under **SIP Service Provider > Proxy**.

> ***IMPORTANT:*** Leave this input field empty for connecting the OpenScape Desktop Client to an OpenScape Voice with a survivable branch solution in the central office.

> ***NOTICE:*** The necessary details can be obtained from the system administrator.

Set the port number for the server connection in the **Connection** section:

- **Delete DNS SRV / port specification in ROUTE headers**
  If this option is active, a DNS server can be used to search the gateway settings. In this case, enter the domain name of the gateway server under **Server**. Alternatively, the ports can be removed from the ROUTE header. This is necessary, for example, in the case of ACME/Session Border Controller configuration. To do this, enter the IP address of the gateway under **Server**.

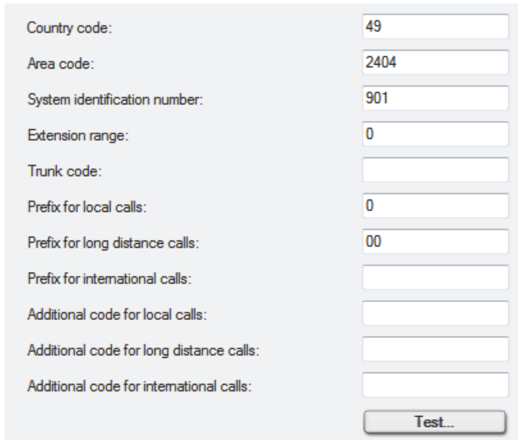
> ***IMPORTANT:*** You must set this option for connecting an OpenScape Voice in survivable branch solutions (for example OpenScape Branch).

- **Use Default Port**
  Depending on the selected transport type, this option for the connection to the proxy server is active by default.
- **Use Custom Port**
  If you select this option, you must enter the port number under **Port**.

2.3.4.7 Network Access

Network access settings must be entered if call number normalization is active. Network access settings (location information) are needed for setting up a direct connection to telephone numbers from OpenScape Desktop Client directories or call lists. These settings are also used for converting call numbers into the internationally dialable format. If these settings are not configured properly, you may encounter problems when setting up connections. Network access settings are not needed if call number normalization is not active.

Select on the tab **Advanced > SIP Service Provider > Network access** to configure the network access settings.



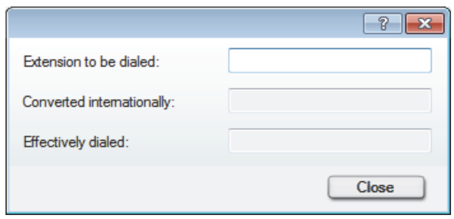
- **Country code**
  Enter here the international prefix for your location, for example `49` for Germany.
- **Area code**
  Enter here the telephone prefix for your location in the national phone number scope. Omit the leading zero for this entry.
- **System identification number**
  Enter the system identification number. This system ID number identifies internal call numbers in the directories that only set up internal connections when selected.
- **Extension range**
  Specify the extension range of your network in the form of a *regular expression.*
  Example:
  You have been assigned the system identification number with the numbers 0049 35 12345-2000 to 0049 35 12345-4999. In this case the extension range reads 2000 to 4999. Enter the following in the **Extension range** field for these phone numbers: `\b[2-4][0-9]{3}\b`.
  – \b - the number must begin with a blank
  – [2-4] - the first digit may be a character between 2 and 4 inclusive, thus 2, 3, 4
  – [0-9]{3} - for the next three digits, numbers 0 to 9 are allowed
  – \b - the number must end with a blank
- **Trunk code**
  Enter here the code that has been configured on your system or on your PBX to allocate trunks for outgoing connections.
- **Prefix for local calls/long distance calls/international calls**
  Enter the network operator ID for the respective call type in the corresponding fields. For example, in Germany no **Prefix for local calls** is used, while for other countries in Europe and members of the NANP (North American Numbering Plan), the zero is used to mark local calls. In Germany, for

example, the **prefix for long distance calls** is `0` and the **prefix for international calls** is `00`. This data is independent from the configuration of the connected communications system and determined by the network operator.

- **Additional code for local calls/long distance calls/international calls**
  Enter here any additional digits to be used as call-by-call prefixes. This data is independent from the configuration of the connected communications system.
  The sequence of the various codes is as follows:
  <office code><additional code><prefix><phone number>

Test

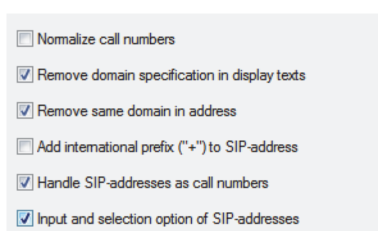
Click on the **Test...** button to open the following dialog and test your entries.



- **Extension to be dialed**
  Enter the number to be dialed in this input field. Based on the currently set parameters the OpenScape Desktop Client determines the phone number in international format.
- **Converted internationally**
  The phone number entered in the above field is automatically displayed in this field.
- **Effectively dialed**
  This field displays automatically the actually dialed number. Depending on the set network access parameters the number may be shorter, for example, if an internal phone number has been recognized.

2.3.4.8 Address Conversion

In the **Settings** dialog, select on the tab **Advanced > SIP Service Provider > Address conversion**.



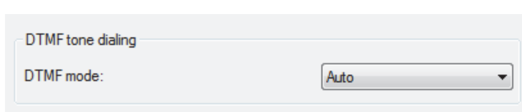
- **Normalize call numbers**
 Normalizing a phone number means its conversion in a permanent default representation from any representation format. A phone number is always normalized when it is to be searched for or passed on to another system that expects a defined phone number format.
Activate this option if phone numbers are to be normalized based on the information from the network access settings on the tab **Advanced > SIP Service Provider > Network access**.

> ***NOTICE:*** Make sure that all required network access data on the tab **Advanced > SIP Service Provider > Network access** is set correctly.

- **Remove domain specification in display texts**
Activate this option to suppress the domain port for a SIP-URI to be displayed (for example display the calling station) on the display.
- **Remove same domain in address**
Activate this option to suppress the domain port in the case of SIP-URIs from the same/own registrar in addresses, for example call lists.
- **Add international prefix ("+") to SIP-address**
Activate this option if the OpenScape Desktop Client is to indicate the SIP address as international.
Example:
The SIP Service Provider delivers the address *sip:4924049087666@enterprise.com* and the OpenScape Desktop Client converts it in *sip:+4924049087666@enterprise.com*.
- **Handle SIP-addresses as call numbers**
If this option is active, the domain portion is ignored and the text that precedes the domain considered a phone number.
Example:
sip:+4924049087666@enterprise.com is considered *+4924049087666*.
- **Input and selection option of SIP-addresses**
Activate this check box to allow the input and selection option of SIP-addresses.

2.3.4.9 Additional Functions

On the **Advanced** tab under **SIP Service Provider > Additional functions** you can perform the settings for using the dual-tone multifrequency (DTMF) procedure.



DTMF tone dialing

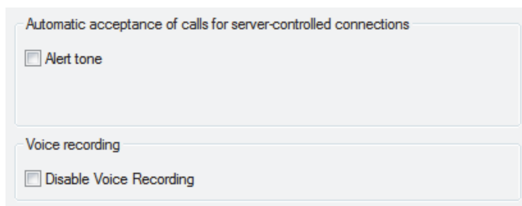
The DTMF tone dialing feature is only available during an active call. It enables using the phone keypad of your preferred device or the computer keyboard for transmitting control commands to the communications system by sending DTMF tones.

The options available in the **DTMF mode** combo box read **Auto** (default) and **Inband**. You can obtain further details from your communications system administrator.

2.3.4.10 System Functions

Select on the tab **Advanced > SIP Service Provider > System functions** to define the system function settings.

> ***NOTICE:*** The functions offered in this dialog are possibly not supported by every SIP communications system.



Automatic acceptance of calls for server-controlled connections

- **Alert tone**
  If you operate the OpenScape Desktop Client via a CTI application and have dialed a phone number via the CTI application, a connection is set up to the OpenScape Desktop Client first. The program accepts this connection request automatically. Subsequently, the connection to the desired call target is set up. If the check box is ticked, the OpenScape Desktop Client indicates with a signal tone after the automatic call pickup that the *handsfree* function is active.

> ***IMPORTANT:*** This option must not be set for the OpenScape Desktop Client Enterprise Web Embedded Edition!

Voice recording

- **Disable Voice Recording**

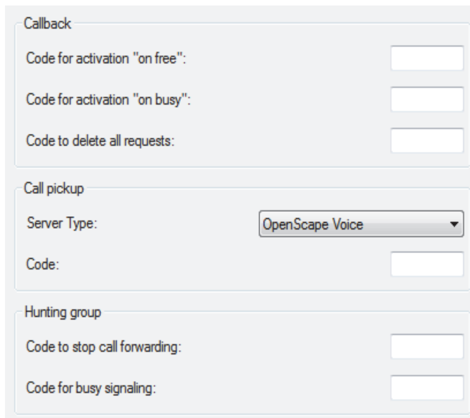
> ***NOTICE:*** This option is not activated by default.

Activating this option hides the voice recording icon from the Softphone menu. Recording an active call with OpenScape Desktop Client is then not possible anymore.

2.3.4.11 Codes

> ***NOTICE:*** The telephony features you can configure on the tab **Advanced > SIP Service Provider > Codes** are unavailable with the OpenScape Desktop Client Enterprise Web Embedded Edition.

Select on the tab **Advanced > SIP Service Provider > Codes** to define codes for various telephony features.



Callback

The callback function enables you to activate an automatic callback for a busy or free internal subscriber. When the busy subscriber finishes his/her call, the callback is initiated. In this process, the subscriber who activated the callback is called first, and after he/she has accepted this call, the target subscriber is called.

> ***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.

You can set the following codes for the **Callback** function:

- **Code for activation "on free"**
  The setting defines the key (`0` to `9`, `*`, `#`) used for automatic activation in case of a free line.
- **Code for activation "on busy"**
  The setting defines the key (`0` to `9`, `*`, `#`) required for automatic activation in case of a busy line.
- **Code to delete all requests**
  This setting defines the key (`0` to `9`, `*`, `#`) required for deleting all automatic callback requests

Call pickup

Call pickup is a telephony feature that signals calls acoustically to a subscriber of a call pickup group and at the same time visually to the other group members by an LED (next to the programmed key) on the display. You can pick up the call by pushing a key or dialing a code number.

You can set the following parameters for the **call pickup** function:

- **Server Type**
  You can select one of the following server types from this combo box:
  - **OpenScape Voice**
  - **Broadsoft**
  - **Sylantro**
  - **Auto**
  - **HiQ4200**

  > ***NOTICE:*** The PBX OpenScape Voice used to be called HiPath .

- **Code**
  Here you can define the key (`0` to `9`, `*`, `#`) used for the call pickup.

Hunting group

The *hunting group* telephony feature enables call distribution within a subscriber group. These subscribers are linked, so that a call to the group is automatically routed to the next free member in case of a busy or unanswered phone.

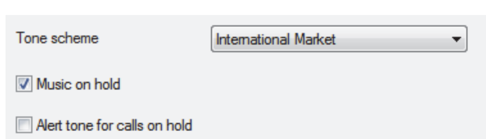
You can set the following codes for the **hunting group** function:

- **Code to stop call forwarding**
  This setting defines the key (`0` to `9`, `*`, `#`) required for ending the automatic call forwarding.
- **Code for busy signaling**
  This setting defines the key (`0` to `9`, `*`, `#`) required for signaling a busy line.

  > ***NOTICE:*** The necessary details can be obtained from the system administrator.

2.3.4.12 Sounds

The tone signals for ring tones, busy signals, etc., differ from one country to another. You can perform the settings for these tones in the OpenScape Desktop Client. This is done on the tab **Advanced > SIP Service Provider > Sounds**.



- **Tone scheme**
  Select from this combo box the country for which the default tones in the OpenScape Desktop Client are to be used. Besides the individual countries, you can also select the option **International Market**.
- **Music on hold**
  Use this option to activate/deactivate music on hold for held/consultation calls.
- **Alert tone for calls on hold**
  If this option is active, an acoustic signal reminds you about calls that are on hold.

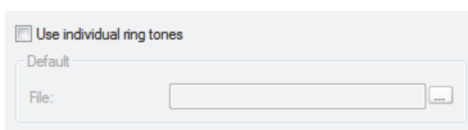
2.3.4.13 Ring Tones

Alternatively to the default ring tones determined by the ring tone color set in the PBX, you can select an individual ring tone for signaling incoming calls. Compatible ring tone files must comply with the following requirements:

- The ring tone file must be available in `WAV` or `MP3` format.
- The file size must not exceed 2 MB. If you configure a bigger ring tone file as ring tone, only the first 2 MB of this file are played.

To configure an individual ring tone, select on the tab **Advanced > SIP Service Provider > Ring tones**.

> ***NOTICE:*** You can edit the settings for the individual ring tone via the **Settings** dialog during the program start or during live operation. Click on the **Manage** button in the Logon dialog or select in the **Pearl menu > Personal Settings > Ring Tones**.

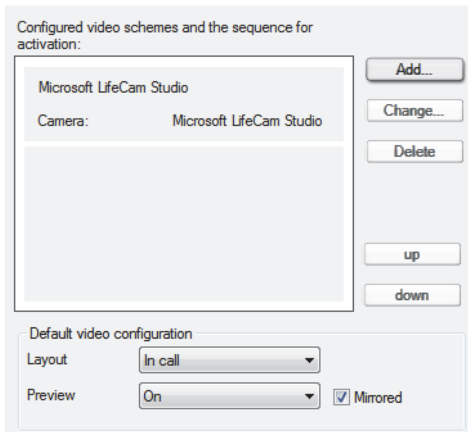


- Via the **Use individual ring tones** option you activate an individual ring tone. After you have activated this option, the OpenScape Desktop Client uses the tone specified under **File** to signal incoming calls.
- Under **File** you define the `WAV` or `MP3` file that contains the desired ring tone. Via the browse button **...** you can look for the desired file.

> ***NOTICE:*** OpenScape Desktop Client copies the content of the selected `WAV` or `MP3` file. In this way the ring tone is still available even if the original sound file is deleted.

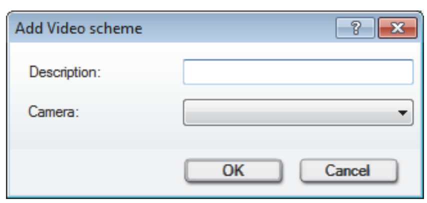
2.3.4.14 Video Schemes

One or more video cameras must be installed in your workplace for sending video signals. No camera installation is required for receiving and representing video signals from other subscribers. The video hardware settings are grouped in video schemes. You can add video schemes and modify or delete single video schemes. This makes it easy to program different video options (for example, on different hardware) and then select the appropriate scheme you want to use. Select on the tab **Advanced > SIP Service Provider > Video schemes** to configure, select, edit or delete video schemes:



Adding a video scheme

After clicking the **Add...** button you can configure a new video scheme. The following dialog opens:



- Enter an expressive name for the video scheme under **Description**.
- In the **Camera** combo box you select the camera to record the image for the video connections in the OpenScape Desktop Client.

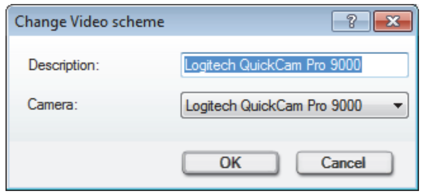
Selecting/activating a video scheme

To select/activate a video scheme, click the one you want in the list of configured video schemes. If a video scheme is available and active, the icon appears after the user login in the softphone menu for controlling the camera preview.

NOTICE: If a video scheme is temporarily locally unavailable, the OpenScape Desktop Client uses the next available video scheme.

Changing a video scheme

After clicking the **Change...** button you can edit the **Description** and **Camera** settings of a selected video scheme. The following dialog opens:



Deleting a video scheme

You can remove a video scheme from the list of configured video schemes with a click on the **Delete** button.

Video scheme sequence

You can define the sequence of the configured video schemes, thus influencing the respective video hardware selection. After the user log-in, OpenScape Desktop Client checks the video hardware specified in the video schemes. The list entries are processed from top to bottom. You can set the video scheme sequence using the **up** and **down** buttons.

Default video configuration

This section provides settings that specify the representation of images in the **Video** window.

- **Layout**
  This option lets you specify the default view for your video window. You can select one of the following views:
  - **In call** (default)
    This view displays images of the connection partners in a frame and slightly turned. Your own image appears bottom left. When it is being transmitted, it is shown in a red frame.
  - **Full window**
    In this view the image of the connection partner occupies the entire video window. Your own image (if configured) appears bottom left. When it is being transmitted, it is shown in a red frame.
  - **Full screen**
    In this view the image of the connection partner occupies the entire screen. Your own image (if configured) appears bottom left. When it is being transmitted, it is shown in a red frame.
  - **Keep previous**
    With this setting you determine that the view used last is saved when you shut the OpenScape Desktop Client down and used again when you restart the program.
- **Preview**
  - **Off**
    Your own image is not displayed or the video camera is switched off.

- **On** (default)
  Your own image is displayed or the video camera is switched on.
- **Keep previous**
  With this setting you determine that the setting used last for your own image is saved when you shut the OpenScape Desktop Client down and used again when you restart the program.

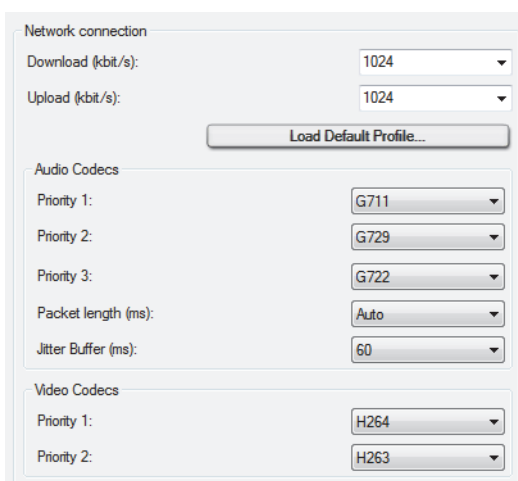
- **Mirrored**
  - When this option is active, your own image is displayed mirrored in the **Video** window but transmitted unmirrored to the connection partner.
  - When this option is inactive, your own image is displayed unmirrored in the **Video** window and also transmitted unmirrored to the connection partner.

2.3.4.15 Bandwidth

Audio and video communication between the OpenScape Desktop Client and the communications system is based on fixed compression algorithms (codecs). To achieve high quality when transmitting audio and video signals via network as far as possible, you must perform appropriate bandwidth and codec settings in the OpenScape Desktop Client.

NOTICE: The video transmission or screen resolution quality may change during an active call. Such changes result from the bandwith for transmitting video data streams automatically adjusting to the available bandwidth resources of the communications system.

To this, you can select the following settings under **Advanced > SIP Service Provider > Bandwidth**:



Network connection

- **Download (kBit/s)**
  Use this combo box to select the velocity available in your system for the download. You thus determine the maximum velocity in which the communications system transmits audio signals and video data streams to OpenScape Desktop Client. The default value for this setting is 1024 kbit/s.

  > ***NOTICE:*** To achieve the maximum video image quality during a video conference, we recommend the maximum value of 36000 kbit/s for setting the download speed.

- **Upload (kbit/s)**
  Use this combo box to select the velocity available in your system for the upload. You thus determine the maximum velocity in which the OpenScape Desktop Client transmits audio signals and video data streams to the communications system. The minimum value we recommend for this setting is 256kbit/s. The default setting for this value is 1024 kbit/s.

  > ***NOTICE:*** To achieve the maximum video image quality during a video conference, we recommend the maximum value of 36000 kbit/s for setting the upload speed.

- **Load Default Profile**
  Use this button to open a window in which the different profiles (tariffs) are listed. You can select your tariff/profile there. Although the associated speeds for **Download** or **Upload** are preset by default, they can be modified.

Audio Codecs

Determine in this section the codec sequence required for voice communication. The three audio codecs that OpenScape Desktop Client supports are **G.711**, **G.729** and **G.722**.

- **Priority 1**
  Use this combo box to select the audio codec to be used for your voice connections with the highest priority.
- **Priority 2**
  Use this combo box to select the audio codec to be used for your voice connections if the audio codec with the highest priority is not available.
- **Priority 3**
  Use this combo box to select the audio codec to be used for your voice connections if the audio codecs with **Priority 1** and **Priority 2** are not available.
- **Packet length (ms)**
  Select **Auto** here or enter the desired value (in milliseconds).
- **Jitter Buffer (ms)**
  To avoid voice packet loss, which can result in poor voice quality and dropouts, set the buffer size in this field. We recommend to set the jitter buffer to value `60`. The jitter buffer caches all incoming voice packets for the period

set and then forwards them to the audio device's sound output. The jitter buffer continues to forward voice packets until none are left, even if the network does not deliver new voice packets quickly enough. This avoids dropouts.
When selecting the optimum setting for the jitter buffer the following applies:

– The better the network quality, the smaller the jitter buffer may be.
– The bigger the jitter buffer, the more the voice output will be delayed.

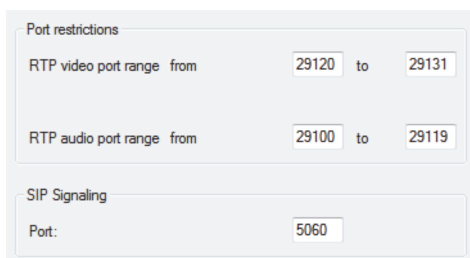
Video Codecs

Determine in this section the codec sequence required for video connection. The two video codecs that the OpenScape Desktop Client supports are **H.263** and **H.264**.

- **Priority 1**
  Use this combo box to select the video codec to be used for your voice connections with the highest priority.
- **Priority 2**
  Use this combo box to select the video codec to be used for your voice connections if the video codec with the highest priority is not available.

2.3.4.16 Port Restrictions

To determine the port restrictions in firewall environments, select on the tab **Advanced > SIP Service Provider > Port restrictions**.



Port restrictions

- **RTP video port range from/to**
  Enter the RTP ports used for the video connections in these fields.

> ***NOTICE:*** If no video transmission is possible during operation despite a correct login, make sure that the **RTP port range** is configured between `29120` and `29131`.

- **RTP audio port range from/to**
  Enter the RTP ports used for the voice connections in these fields.

> ***NOTICE:*** If no voice transmission is possible during operation despite a correct login, make sure that the **RTP port range** is configured between `29100` and `29119`.

SIP signaling

- **Port**
  In this entry field you specify the SIP port used for the signaling connections.

> ***NOTICE:*** If you have set the **TLS** entry under **SIP Service Provider > Connection** in the **Protocol** field, specify value `5061`. This port is used for secure connections.

2.3.4.17 Mobile User

> ***NOTICE:*** You can use the SIP Mobile User functionality only if a DLS server is available in your SIP communications system. Furthermore, the **Use central configuration** option must have been activated when setting up OpenScape Desktop Client. In addition, you must enter the DLS configuration parameters for the central configuration on the tab **Advanced > General > Central Configuration**.

The DLS mobility concept enables assigning phone numbers of specific persons or person profiles instead of specific devices. In this way, OpenScape Desktop Client users can communicate with their contacts independently from the device used. When the device is changed, the user keeps his/her phone number and personal settings (for example individual ringtone). The DLS server administers for each mobile user a mobile-user profile, which consists of a mobility number and a mobile-user password.

SIP Mobile User logon

An SIP Mobile User can log on to the OpenScape Desktop Client or at a device (for example office phone, mobile phone, laptop) with his/her mobile-user profile.

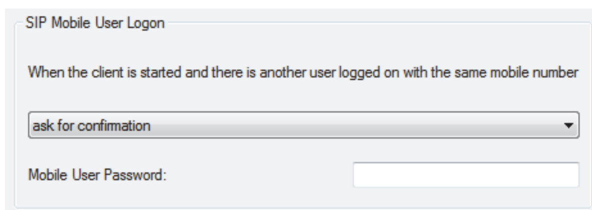
> ***NOTICE:*** Be sure to have a mobile-user profile in the DLS. Please consult your system administrator for further information.

If you are logged in at the OpenScape Desktop Client with your mobile-user profile, a corresponding message is displayed when you try to log on to another device. You are logged off from the communications system immediately afterwards. The user interface, however, is visible until you click on **OK**. The message is closed and the OpenScape Desktop Client terminated.

If you are still conducting a call with OpenScape Desktop Client, there are two options, which depend on the DLS configuration:

- The active connection is immediately closed. You are logged off from the communications system afterwards. The user interface, however, is visible until you click on **OK**. The message is closed and the OpenScape Desktop Client terminated.
- After a pre-set time has expired, the active connection is automatically closed and you are logged off from the communications system. The user interface, however, is visible until you click on **OK**. The message is closed and the OpenScape Desktop Client terminated.

In the **When the client is started and there is another user logged on with the same mobile number** combo box you can define how the DLS server is to behave if you are logged in at another device or at OpenScape Desktop Client with your mobile-user profile at the time of the login at OpenScape Desktop Client or at a device.



- **ask for confirmation**
  If you are logged in at a device with your mobile-user profile and this option is selected, a message is displayed at the OpenScape Desktop Client start. This message informs you, that you are already logged in at another device, which is indicated with its MAC address or assigned phone number, with the same mobile-user profile. Select **Yes** to log off from the other device and to start the OpenScape Desktop Client as mobile-user. Select **No** to abort logging on to the OpenScape Desktop Client.
  If you are still conducting a call on the device, there are two options, which depend on the DLS configuration:
  - The active connection is closed after a pre-set time and the OpenScape Desktop Client logs on to the communications system.
  - Logging off from the device is denied by the DLS. You can try again after finishing the call.
- **log them off without confirmation**
  You are automatically logged off from the other device, at which you are logged in at the time of the program start with the same mobile-user profile.
- **do not start the client**
  The OpenScape Desktop Client is not started.

During the first start of the program you are prompted to enter the **Mobile User Password**. Your entry is copied to the input field of the same name.

NOTICE: If the specified **Mobile User Password** is incorrect, a corresponding error message appears. Thereafter, you can enter the password again.

NOTICE: The program start is also abandoned if you do not have a valid mobile-user license or if the device has not been configured as mobility-enabled device in the DLS. A corresponding error message is displayed.

NOTICE: You can obtain further information about DLS and the DLS mobility concept from the administrator documentation of *Deployment Service V3.0*.

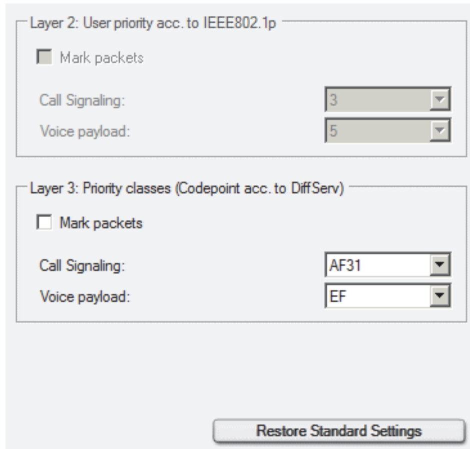
2.3.4.18 Quality of Service (QoS)

IMPORTANT: The configuration dialog for QoS settings is only available under Microsoft Windows XP.

IMPORTANT: Deploying the QoS service requires a QoS Packet Scheduler being active for the connection used.

NOTICE: Please obtain further information about configuring the QoS settings and creating the QoS policies for the operating systems Microsoft Windows Vista SP1/Microsoft Windows 7/ Microsoft Windows 7 SP1 from the setup guide *OpenScape UC Application V7 OpenScape Desktop Client Installation and Administration*.

If you wish to modify the QoS settings, select on the tab **Advanced > SIP Service Provider > Quality of Service**.



The displayed dialog shows the default settings for the following parameters:

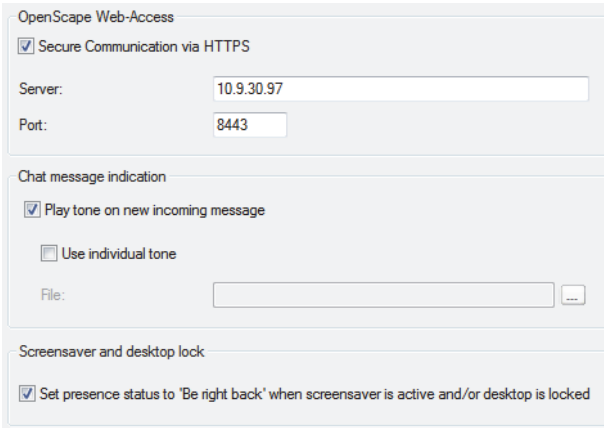
- **Layer 2: User priority acc. to IEEE802.1p**
  Under Microsoft Windows XP Professional SP2 and later you cannot perform any settings for **Layer 2**.
- **Layer 3: Priority classes (Codepoint acc. to DiffServ)**
  Under Microsoft Windows XP Professional SP2 and later you can set the QoS values for the traffic types **Call Signaling** and **Voice payload** individually. You can use the **Mark Packets** option to individually define whether the data of the traffic types **Call Signaling** and **Voice payload** is furnished with the respectively set QoS values.
- **Restore Standard Settings**
  Click on this button if you want to reset the QoS settings to the default values.

NOTICE: On a computer with Intel Centrino Duo processor, OpenScape Desktop Client will detect this automatically at runtime. In this case the OpenScape Desktop Client uses the QoS support provided by the Intel Centrino Duo processor.

NOTICE: The computer needs to be rebooted for the QoS settings changes to become active.

2.3.5 Settings for the WebClient Embedded

The **WebClient Embedded** is in charge of providing web access to the OpenScape UC Application system. It offers further configuration options that can only be accessed via the user interface of the integrated OpenScape Web Client.



The following settings can be made via this dialog:

OpenScape Web-Access

- The **Secure Communication via HTTPS** check box is ticked by default. This means that all data is transmitted encrypted.
- Specify in the **Server** field the URL or IP address of the server that hosts the OpenScape Web Client.
- Enter the port number for accessing the server on which the OpenScape Web Client is installed in the **Port** field. If you have set the option **Secure Communication via HTTPS**, the default value for the port setting is `8443`. Otherwise, port `7789` is used by default.

> ***NOTICE:*** These specifications are provided by the system administrator.

Chat message

> ***NOTICE:*** You can perform these settings while logging in and also during operation.

- The **Play tone on new incoming message** check box is ticked by default. This setting makes the OpenScape Desktop Clientsound a default tone that notifies you about every new chat message.
- When you activate the **Use individual tone** check box you can select the desired sound file in `*.wav` format for signaling new chat messages.

Screensaver and locked workstation

NOTICE: You can perform this setting during the login and also while operating the OpenScape Desktop Client.

When the **Set presence status to "Be right back" when screensaver is active and/or desktop is locked** check box is ticked, the OpenScape Desktop Client-checks whether **Available** is your current presence status. If so, it is automatically reset to **Be right back**. When unlocking the workstation or deactivating the screensaver the presence status is automatically reset to **Available**.

NOTICE: If you have set a presence status different from **Available** and activated the screensaver or locked the workstation, this presence status is kept.

NOTICE: If the above check box is not active, your presence status remains unchanged when you activate the screensaver or lock the workstation.

---

3 Operation Reference

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

3.1 Starting the Program

The program can be started as follows:

- Click on **Start** in the Windows task bar and select .
- Doubleclick the program link on the desktop of your computer.

The program always starts under the user profile used last.

The **Logon** dialog opens right after the program start by default.

Depending on the program start configuration (the **LIN** field may be hidden, for example), the program starts without any further login actions required.

3.1.1 Error Signaling at the Program Start

If errors occur in the first 120 seconds after the program start of OpenScape Desktop Client, for example connection, sound device or license problems, the **Current error report** window opens. This window contains details about the occurred error.

During operation, errors are indicated in the Pearl menu by .

3.2 User Login

Users may log on in the following ways:

- **First login**
  The **Profile creation** dialog opens during the initial program start after the setup or, if no user profile has yet been created for the current Windows account, when the program starts.
- **Default login**
  When you start the program, the **Logon** dialog is displayed by default. You can edit login information there.

NOTICE: If profile data from the last session is available when you start the program, it is entered by default for the current session.

- **Automatic login**
  If no **LIN** number is configured for the current Windows user account (HFA only), you are automatically logged on without having to make entries in the Logon dialog. In this case, changes to the user preferences (language selection, for instance) are impossible before the program starts.

  > ***IMPORTANT:*** You can invoke the Logon dialog if you want to modify the profile or revise the profile settings. When you start the program, keep the **shift** key pushed for this purpose.

  > ***NOTICE:*** Please obtain detailed information about configuring an **LIN** number in an HiPath 4000 from the documentation of the respective HiPath 4000 PBX.

3.2.1 Initial Program-Login

You log on for the first time in the **Profile creation** dialog, which is only displayed if no profile settings are available for the current Windows user account at the program start. This is the case, for example, immediately after the setup or after the configuration files have been deleted.

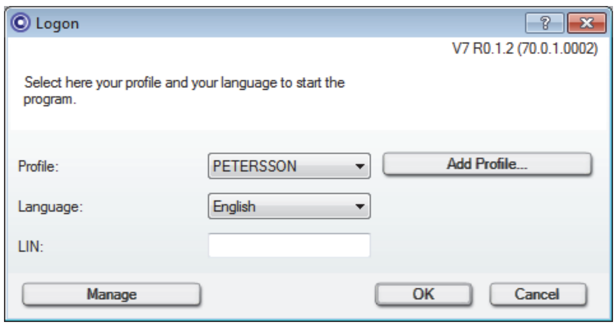
In this dialog you can perform the following settings:

- **Profile Name**
  Specify the name of the profile you wish to work with under **Profile Name**. A profile defines specific module and private settings, which are stored in a configuration file. These settings are read during login. This enables you to access your individual program environment when working with this program in different locations or on different computers.
- **Login**
  If the program was installed with available central configuration (*Deployment Service (DLS))*, the **Login** field displays your Windows user ID automatically. Based on the Windows user ID the OpenScape Desktop Client will connect to the central configuration automatically and download the centrally stored configuration data.

- **OK**
  A click on this button closes the **Profile creation** and the desired profile is created. The **Settings** dialog opens automatically. In there you need to perform the profile-specific settings. You cannot operate the program without these settings.
- **Cancel**
  A click on this button closes the **Profile creation** dialog and the initial login at the program is abandoned.

3.2.2 Default Login

The **Logon** dialog is used for the default login at the program.



Depending on the program-start settings, this dialog may appear differently. Some input fields and buttons may be disabled.

> ***NOTICE:*** The input fields and settings to be displayed in the Logon dialog can only be specified while operating OpenScape Desktop Client in the **Settings** dialog on the **Advanced** tab under **General > Program Start**.

In the following we describe the functions of all input fields and buttons of the Logon dialog regardless whether or not they are displayed in your Logon dialog.

- **Profile**
  Several profiles can be configured for every Windows user. A profile defines specific module and private settings, which are stored in a configuration file. These settings are read during login. This enables every user to access his/ her environment when working with OpenScape Desktop Client in different locations or on different computers.
  Select the profile that allows you to operate as a user in the **Profile** field. If the profile you are using is not yet listed, click on the **Add Profile...** button (if configured).
- **Language**
  Select from the languages list the language to be used for the controls and online help.

- **LIN**
  The **LIN** (Local Identification Number) field is used for local assignments of building and room numbers or coordinates, for example. This number serves for quickly localizing a computer on which the OpenScape Desktop Client is installed. Depending on your configuration, this field can be hidden, furnished with a default value or configured as required field.

  > ***NOTICE:*** You can use the **LIN** number only if you operate the OpenScape Desktop Client connected to a HiPath 4000 (**HiPath Provider**).

  > ***NOTICE:*** Please obtain detailed information about configuring an **LIN** number in an HiPath 4000 from the documentation of the respective HiPath 4000 PBX.

- **Add Profile...**
  A click on this button lets you create a new profile. The **Add Profile** dialog for specifying the **Profile Name** opens.

  > ***NOTICE:*** You can obtain detailed information about the user and location concept of OpenScape Desktop Client from the *OpenScape UC Application V7 OpenScape Desktop Client Installation and Administration* manual.

- **Manage**
  A click on this button invokes the menu for managing the configuration settings.
- **OK**
  A click on this button closes the Logon dialog. Modifications to the settings are saved. Subsequently, the program starts and the main window opens.
- **Cancel**
  A click on this button aborts the logon and program start.

3.3 Ending the Program

You shut the program down with the **Exit OpenScape** option in the OpenScape context menu in the notification area of the Windows task bar. The program window closes and you are logged off of the communications system.

If you wish to shut the program down during an active call, a confirmation dialog opens. A click on **OK** then confirms that you agree to the program's shutdown despite the active call. A click on **Cancel** closes the confirmation dialog and the active call can still be conducted.

> ***NOTICE:*** You close the main window with a click on  at the window's top right margin. The program is not closed, though. You remain logged in at the system and can make or accept calls. A

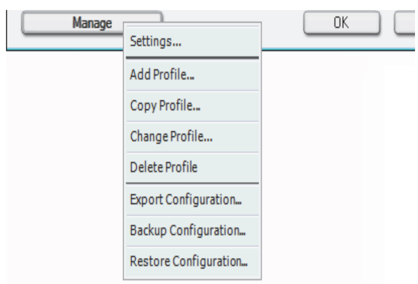
rightclick on the OpenScape icon in the Windows task bar and selecting the **Open OpenScape** option displays the main window in the foreground again.

3.4 Administering the Configuration Settings

NOTICE: You can perform some configuration settings only during the logon procedure. Other settings that do not directly affect operation can also be edited after the user login, for example configuring the individual ring tone.

NOTICE: You can display the configuration settings via the **OpenScape Options** item of the OpenScape context menu during operation. You open this context menu by rightclicking the OpenScape icon in the notification area of the Windows task bar.

You open the configuration settings with a click on the **Manage** button in the Logon dialog.



There are different functions available for managing the profile information and for switching to the configuration - depending on the configuration options defined at the program start.

The following options are available in the menu of the **Manage** button:

- **Settings**
  Opens the **Settings** dialog for configuring the parameters. Once you have finished editing your settings you are returned to the **Logon** dialog. The current settings are applied when you log on.
- **Add Profile...**
  Opens the **Add Profile** dialog, in which you can define a new **Profile Name**.
- **Copy Profile...**
  Opens the **Copy Profile** dialog to copy the profile settings of the current profile to a new profile. The settings valid for the copied profile are taken for the new profile.
- **Change Profile...**
  Opens the **Change Profile** dialog in which you can define a different **Profile Name** for the current profile.

- **Delete profile**
  Deletes the current profile.
- **Export Configuration...**
  Lets you export the parameter settings for the current login user, login PC or login profile either fully or partially to the configuration or script files. You find further information about exporting the configuration in the *OpenScape UC Application V7 OpenScape Desktop Client Installation and Administration* manual.
- **Backup Configuration...**
  Outsources all parameter settings for the current login user, the current login computers and login profiles. You can create a destination folder to which this full configuration is then exported in a defined structure. You find further information about backing up the configuration in the *OpenScape UC Application V7 OpenScape Desktop Client Installation and Administration* manual.
- **Restore Configuration...**
  Loads all parameter settings for a user/PC/profile combination. You can enter a source folder from which the defined structure for a full configuration is loaded. You find further information about restoring the configuration in the *OpenScape UC Application V7 Installation OpenScape Desktop Clientand Administration* manual.

3.5 Notes for using the OpenScape Desktop Client efficiently

Your status information - the basis for ideal communication

OpenScape UC Application uses your status to determine how the communication is to take place. Your co-workers can see whether you are available, in a meeting, busy, unavailable, etc. (You can always choose to block individuals from seeing your status.)

Always remember to define your status and to update it regularly.

> ***NOTICE:*** There is no correlation between your OpenScape UC Application status and your groupware status.

Your devices - You determine them, the OpenScape Desktop Client keeps track.

You define the devices for receiving voice calls. The OpenScape UC Application keeps track of all devices monitored by OpenScape Voice, determines the overall availability of those devices and then routes calls, e-mails, or instant messages appropriately.

A click on the Minimize icon in the top right corner of the program window hides this window. The program continues to run. You can display the main window again in two ways: Either doubleclick the OpenScape icon in the notification area of the Windows task bar. Or select the **Open OpenScape** option in the context menu of the program icon in the notification area of the Windows task bar.

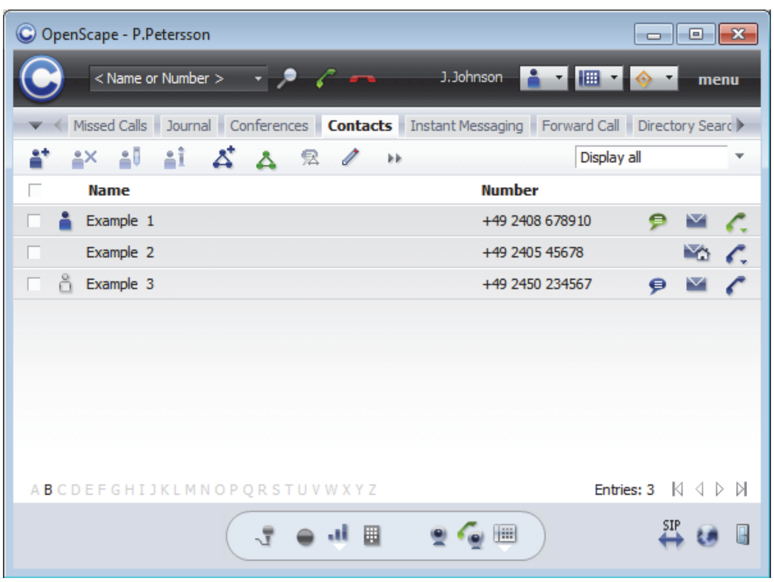
If you want to hide the opened program window, click on (**display desktop**) in the Windows quick access bar. The program continues to run. You can display the application window again in two ways: Either doubleclick the OpenScape icon in the notification area of the Windows task bar. Or select the **Open OpenScape** option in the context menu of the OpenScape icon in the notification area of the Windows task bar.

> ***NOTICE:*** You configure the display of the OpenScape icon in the notification area of the Windows task bar in the dialog **Settings > Advanced tab > General > Task Bar and Notification Area**.

3.6 Main Window

The main window opens directly after you have logged in to the system by default and represents the central OpenScape Desktop Client Enterprise Web Embedded Edition operating element.

When you use, for example, an OpenScape Voice connection (SIP), the main window may look as follows and provides further features and elements for operating the program:



- **Main menu**
  enables you to operate the program quickly and is found at the top margin of the main window
- **Pearl menu**
  enables accessing basic features and is a component of the main menu
- **Tab bar**
  enables quick access to single function windows of the workspace and is found beneath the main menu

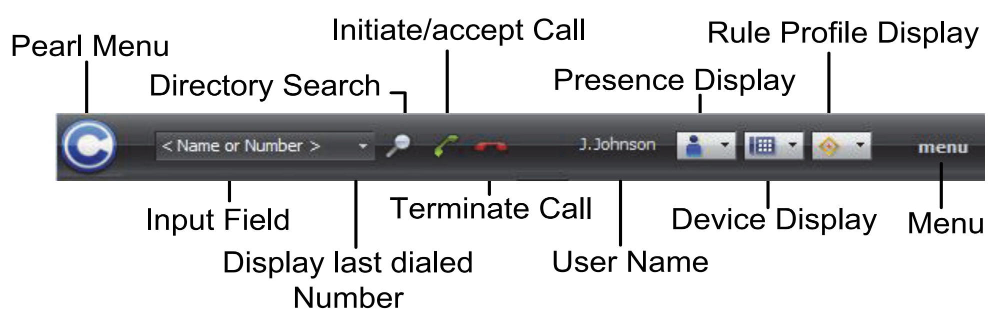
- **Workspace**
  enables accessing the features of different function windows. The above example shows the **Contacts** function window.
- **Softphone menu**
  enables accessing various features of the SIP or HFA softphone, controlling the volume as well as displaying the connection status of the installed Provider module (**SIP** or **HiPath Provider**) and of the OpenScape UC Application server.

The following sections describe the single controls of the main window and their function in detail.

3.7 Main Menu

You find the main menu at the top margin of the main window.

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



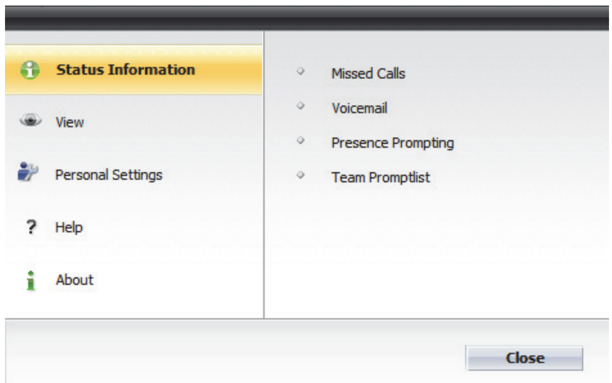
- **Pearl menu**
  This is an application menu icon for accessing the basic features of the integrated web interface.
- **Input field**
  Input field for phone numbers or names combined with the combo box for displaying the phone numbers you have dialed last. With a click in this input field and after 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 or simply press the **return key** after you have entered the contact's name. The **Directory Search** function window with search results already found opens.
  - To call a contact from the contact list click on the contact's number(s) displayed under the input field **<Name or Number>**.

– If you have defined a **hotkey** in the Settings dialog on the **Advanced** tab under **General > General** and selected a phone number in another application, this number is automatically displayed in the **<Name or Number>** input field and dialed by the program.

- **Directory search**
  Click on this icon to open an input mask in which you can look for a contact via 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
- **Presence Display**
  Presence display in the form of a combo box, which displays your current user status. After a click on this combo box you can change this status via a selection list.
- **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 integrated web interface as well as to configure the voicemail box and the rule interpreter tool.

3.7.1 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.

3.7.1.1 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.

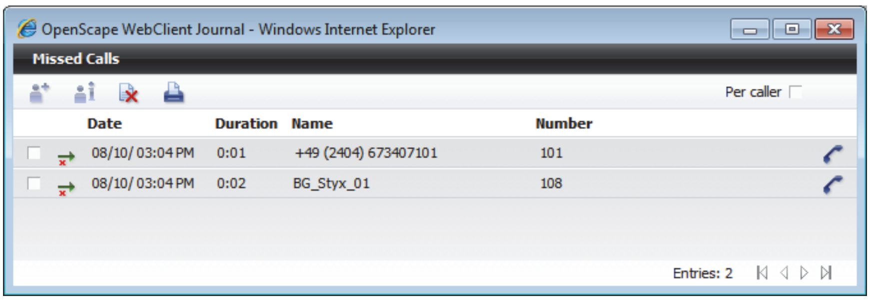
- **Presence Prompting List**

- **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.

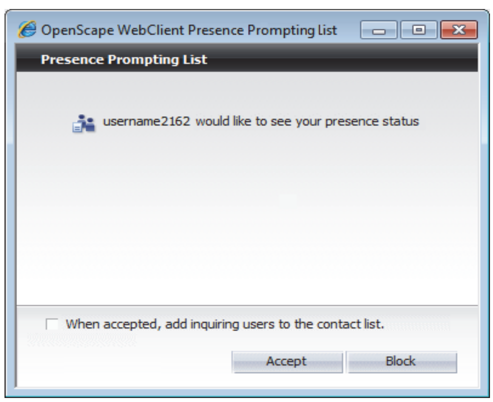
> ***NOTICE:*** The name can only be displayed if it is contained in the contact list or global address book.

- - 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.

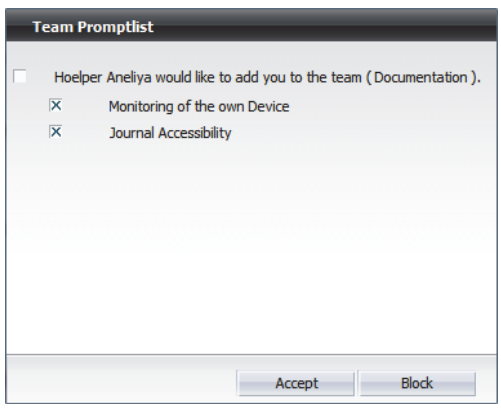
You can reject the request with a click on the **Block** button. The corresponding contact entry is moved to the **These users are not allowed to see your presence status** list.

> ***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.

3.7.1.2 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.

3.7.1.3 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, for example, add new devices, change device definitions or delete devices no longer required.

3.7.1.4 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.

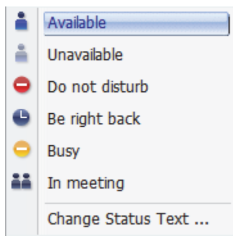
3.7.1.5 About

When you position the mousepointer on this option, the menu area on the right displays the version number of the integrated OpenScape Web Client and a link to open the Software License Agreement.

3.7.2 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.

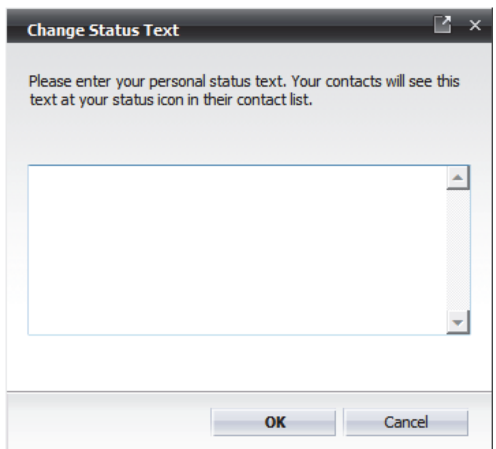
The following presence statuses are available:

- **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.

3.7.3 Device Display

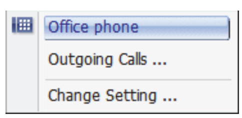
Next to the presence display combo box in the **main menu** you find the device display combo box. Move the mousepointer over the combo box to display a quick info showing the device name and the device address (phone number) of your device currently set for incoming calls.

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.

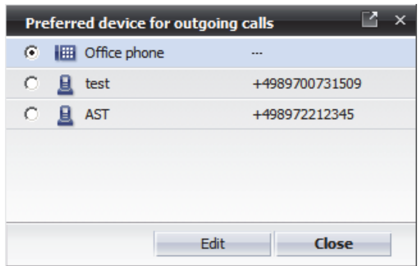
When you click on the combo box, the following menu opens for selecting the preferred device or configuring a call forwarding.



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.

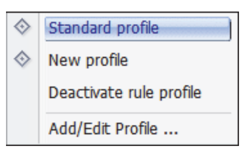
> ***NOTICE:*** If you have configured different devices for in and outbound calls, this is indicated by a red icon on the combo box.

3.7.4 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.

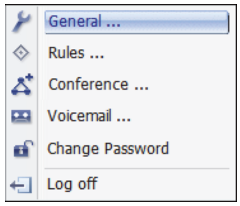
When you click on the display the following menu opens.



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.

3.7.5 menu

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



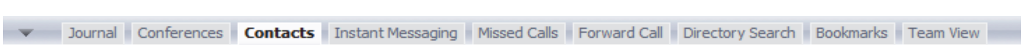
The following settings can be made:

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

> ***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*.

3.8 Tab Bar

The tab bar displays the single function windows of the workspace as tabs. You find the tab bar under the main menu in the program's main window.



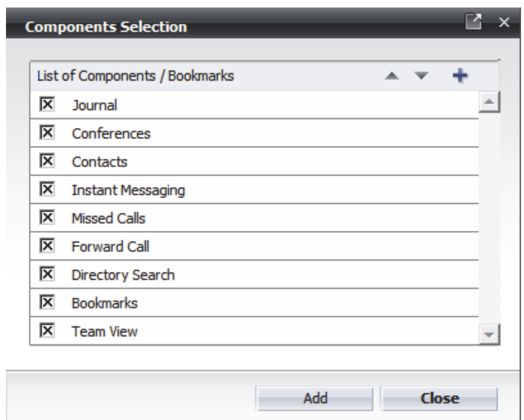
With a click on the tabs you can toggle the following function windows:

- **Missed Calls**

- **Journal**
- **Voicemail Box**
- **Conferences**
- **Contacts**
- **Instant Messaging**
- **Forward Call**
- **Directory Search**
- **Bookmarks**
- **Team View**

Depending on the size of the main 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 make tabs selectable 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.

3.9 Workspace Function Windows

The workspace contains the following function windows:

- **Call Control**
- **Contacts**
- **Instant Messaging**
- **Conferences**
- **Directory Search**
- **Journal**
- **Missed Calls**
- **Voicemail Box**
- **Forward Call**
- **Bookmarks**
- **Team View**

These function windows can be displayed individually via the tab bar under the program's main menu in the workspace of the main window. All function windows except **Forward Call** and **Bookmarks** can also be opened separately via the **Pearl** menu.

The following sections describe the available function windows, their controls and functionality.

3.9.1 General Controls

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 for browsing in the respective window. Use the following icons to selectively display list entries:

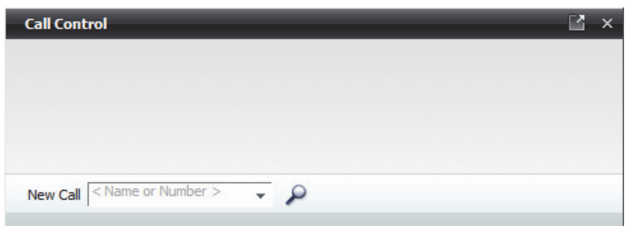
- The next entries are displayed.
  Example: If six entries can be seen in a journal, the next six entries are displayed.
- The previous entries are displayed.
  Example: If six entries can be seen in a journal, the previous six entries are displayed.
- The beginning of the list is displayed in the function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

3.9.2 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.

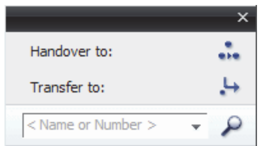
In this function window you find the following information:

- 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.

3.9.2.1 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.

3.9.2.2 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 .

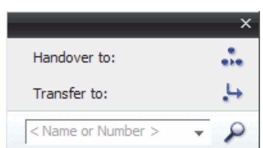
3.9.2.3 Active Call

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.

3.9.2.4 Outbound Connection

When you initiate a call, the OpenScape Desktop Client reacts according 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 soft phone). 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:

- **Drop a call**
  The connection setup is abandoned.
- **Request callback**
  – Completion of Calls to Busy Subscriber (CCBS) - If you receive the busy sign from the desired subscriber, you can click on to automate a connection setup in the PBX to the previously busy target subscriber before hanging up. If the previously busy line becomes free again, the OpenScape Desktop Client is informed by the PBX accordingly. The OpenScape Desktop 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 callback with a click on , the target subscriber is called by the PBX again.
  – Completion of Calls on No Reply (CCNR) - If the line of the other subscriber is free but he/she does not accept the call, you can click on to automate the connection setup to the desired subscriber in the PBX. When the target subscriber hangs up the next time, the PBX informs the OpenScape Desktop Client accordingly. The program then lets you

know by a call in the **Call Control** window that the subscriber is available. If you accept this call (callback) with a click on , the PBX connects you to the desired 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 PBX of the callee does not support the service.

3.9.2.5 Consultation Call

Controls of the held call

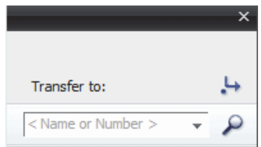
During a consultation call, the following controls are available in the area of the held call:

- **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.

3.9.2.6 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.

3.9.2.7 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 conference 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.

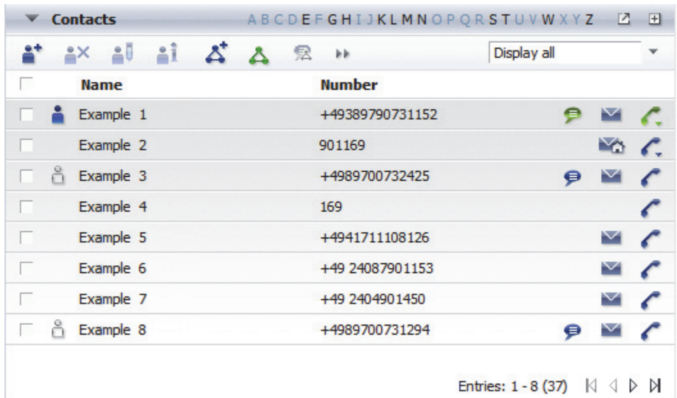
> ***NOTICE:*** The administrator can change the assignment of commands to the single keys. If the above default key assignments are not valid for your system, please consult your system administrator.

3.9.3 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

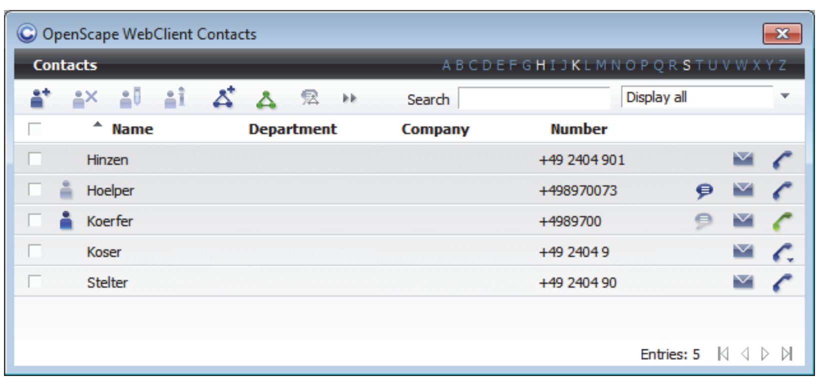
You reach the compact view of the **Contacts** function window on the tab displayed in the main window under the main menu.



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.

Extended view

You reach the extended view of the **Contacts** function window via the **Pearl menu > View > Contacts**. You open it in a separate window and it shows the contact attributes **Department** and **Company** in addition to the contact information displayed in the **Contacts (compact)** window.



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, this initial letter in the alphabet appears in white 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.

Furthermore, you find an entry field with the additional feature **Search** 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 **Search** 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.

3.9.3.1 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

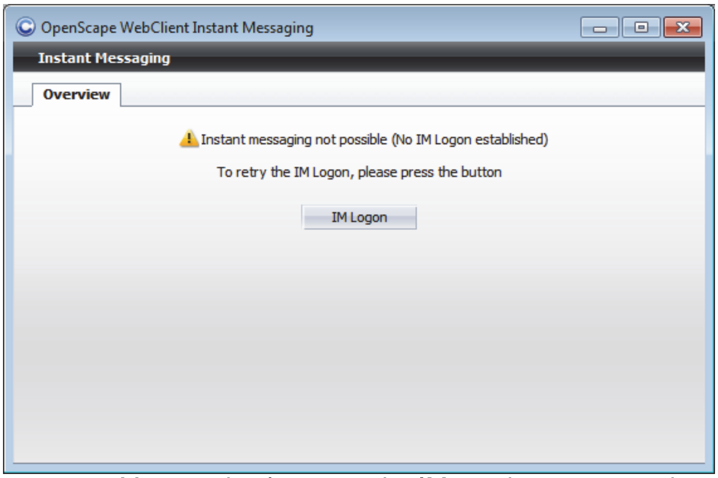
> ***NOTICE:*** On the left-hand margin of the area under the toolbar of the **Contacts** function window you find the **Select/Deselect all entries** radio button. It lets you select all contact entries in your contact list for synchronizing them with the global company contact directory, for example.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

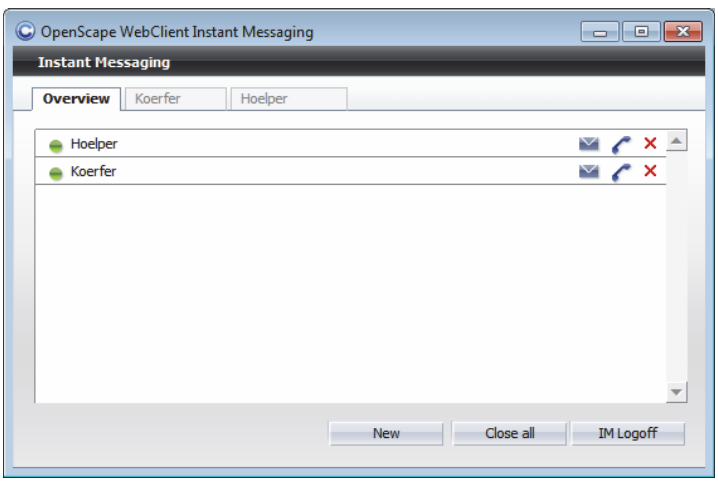
– The IM-status of this contact is *Offline*. The contact is not logged in at the system or at the instant-messaging service.

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.

3.9.3.2 Controls in the "Contacts" Window

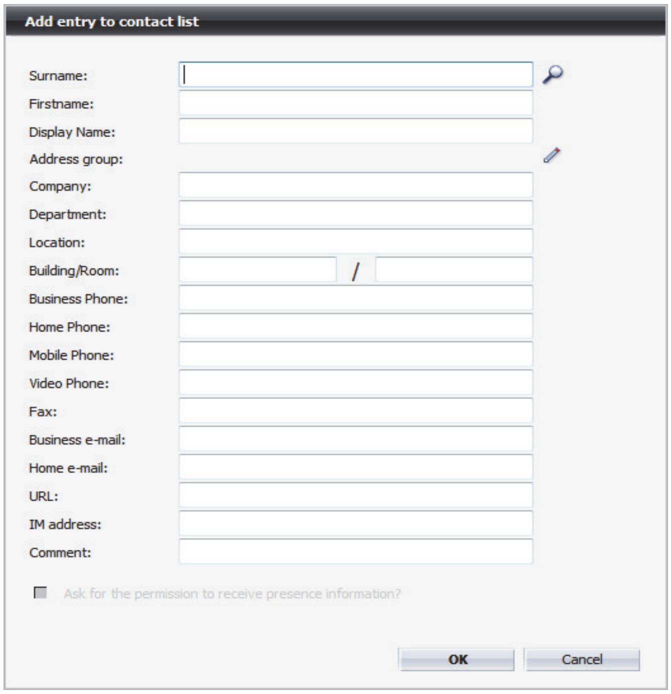
This section describes the functions available in the **Contacts (compact)** and **Contacts (advanced)** dialogs.

You can reach the following features via the toolbar of the **Contacts (compact)** as well as 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: With a click on you can initiate a video call. The video connection is only set up if you and your conversational partner have activated the video call feature in the Softphone menu. Otherwise, a pure audio connection will be established.

  – , **Send e-mail**

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

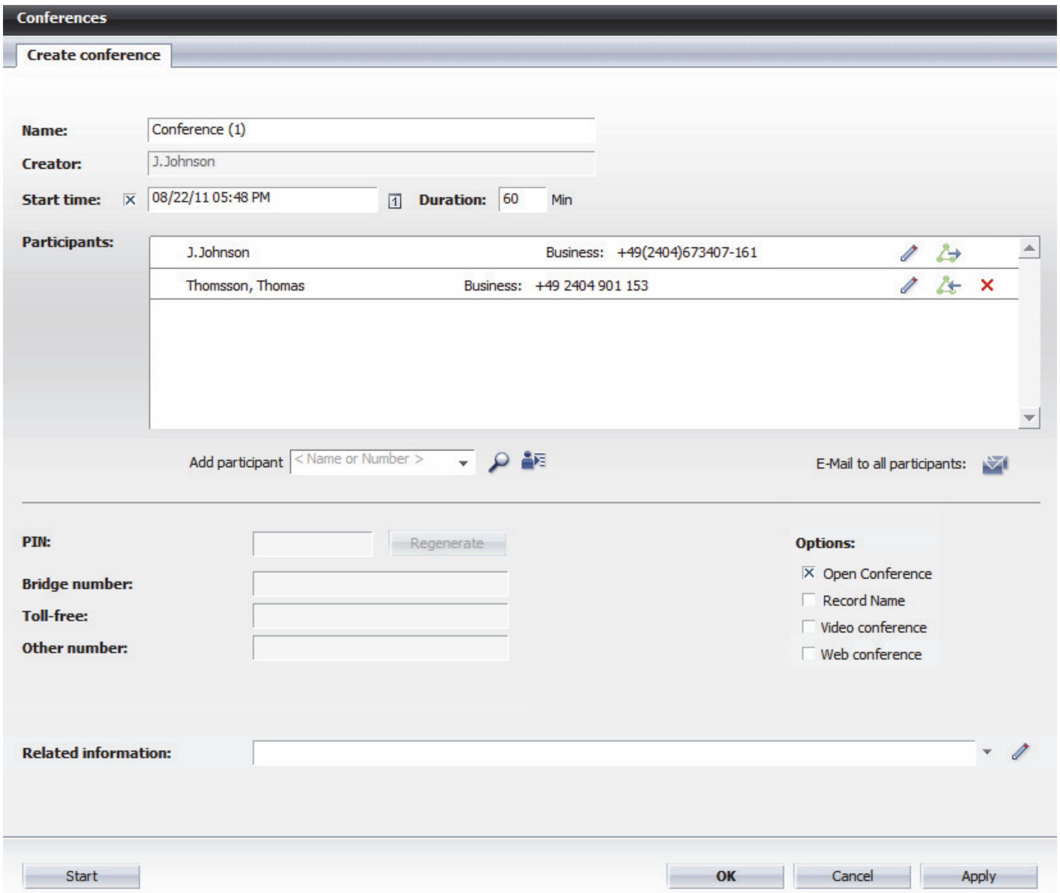
  – **Send instant message**

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

  – **Open a note**

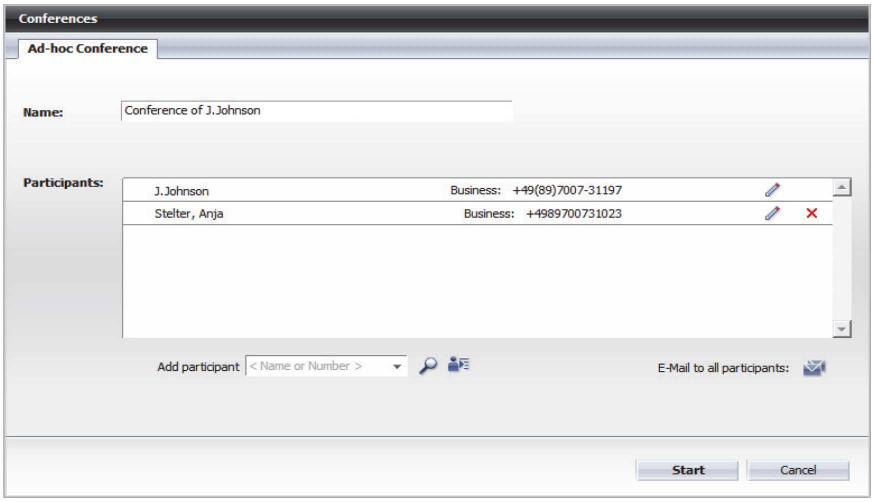
    Click on to add a note to the contact or journal entry.

- **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.



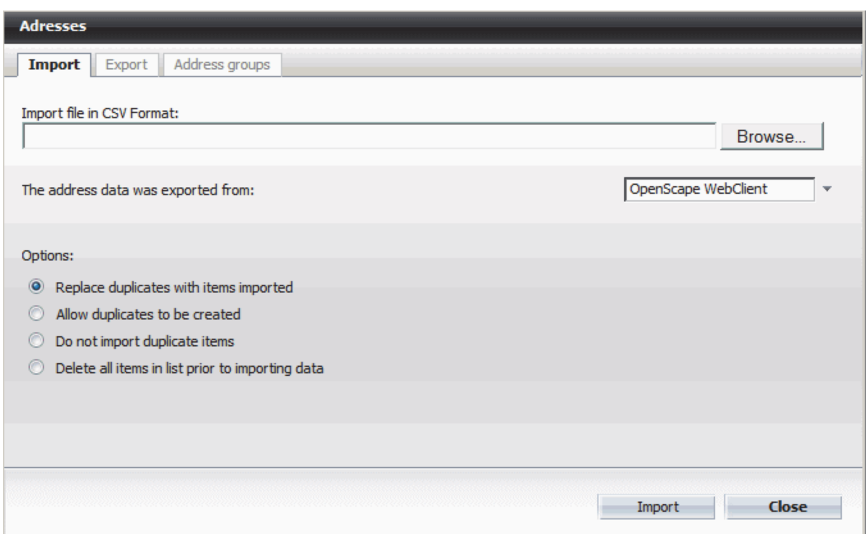
  The participants selected in the contact list have already been adopted as conference participants.

- **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.
- **Configure**
  A click on opens the following configuration dialog for the address data:



Via this dialog you can import address data in your contact list, export your contact list as well as edit and manage your configured address groups and define new address groups.

- **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 **File** button in this window and then select the **Save as ...** option. The directory selection dialog of Microsoft 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. Then click on the **Save** button.
  – **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:

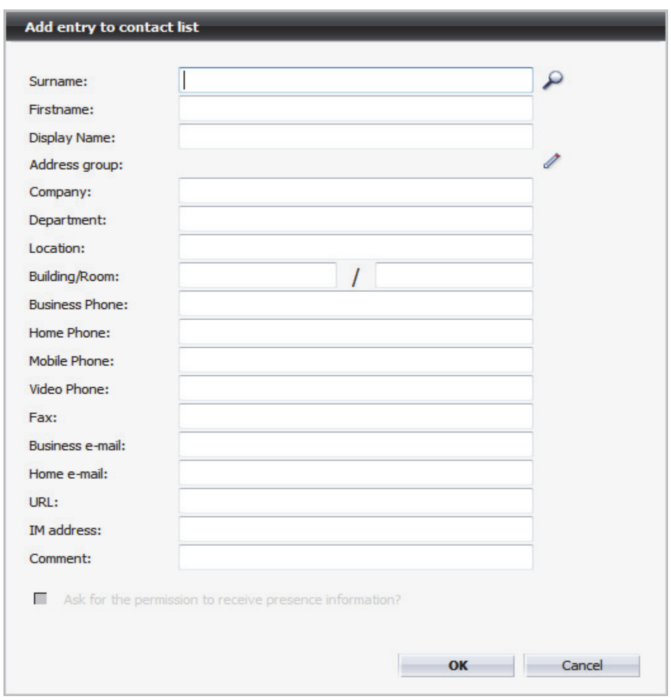
- **Display all**
  shows all contacts in alphabetic order, either ascendingly or descendingly,
- ***<Address group names>***
  and the address groups you have already created.
- **Edit...**
  A click on this option opens the configuration dialog for the address groups. In this dialog you can define 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 for e. g. starting an Ad-hoc or IM-conference with them. Another mouse click on this option cancels the selection.

3.9.3.3 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.

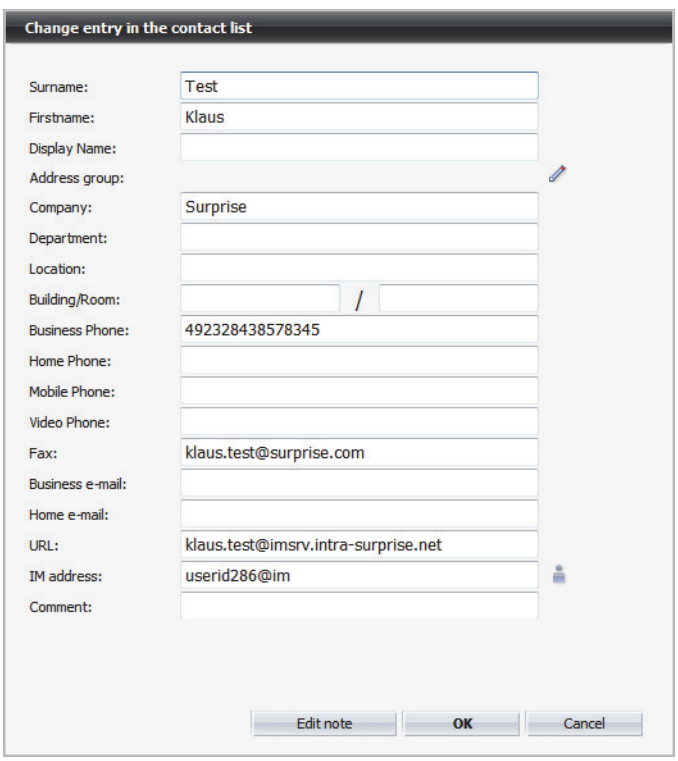
- **IM address**
  Here you can enter an instant-messaging address with a maximum of 64 characters.
- **Comment**
  Here you can enter a comment with a maximum of 255 characters.
- **Ask <contact name> for the permission to receive presence information?**
  When you integrate another OpenScape UC Application 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.

3.9.3.4 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.

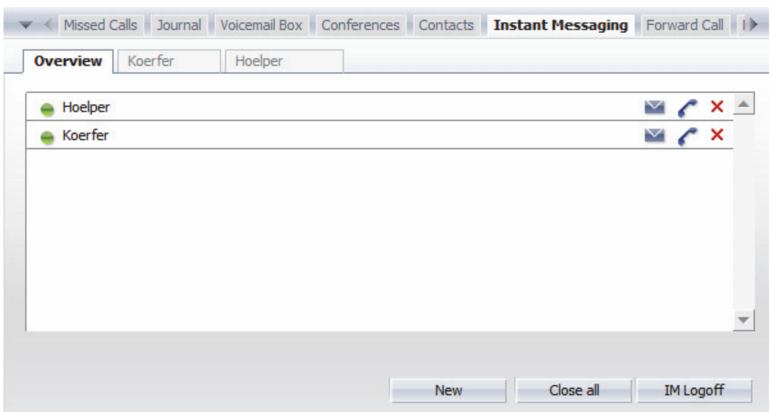
With a click on the **Cancel** button you can close the input mask without saving performed changes.

3.9.4 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:

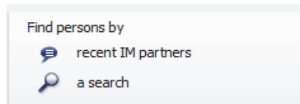
- As separate window via the **Pearl menu > View > Instant Messaging**
- As separate window with a click on one of the following icons in the **Contacts** window: , or .
- As part of the workspace by selecting the **Instant Messaging** option in the tab bar under the main menu.



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 contact entries 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:

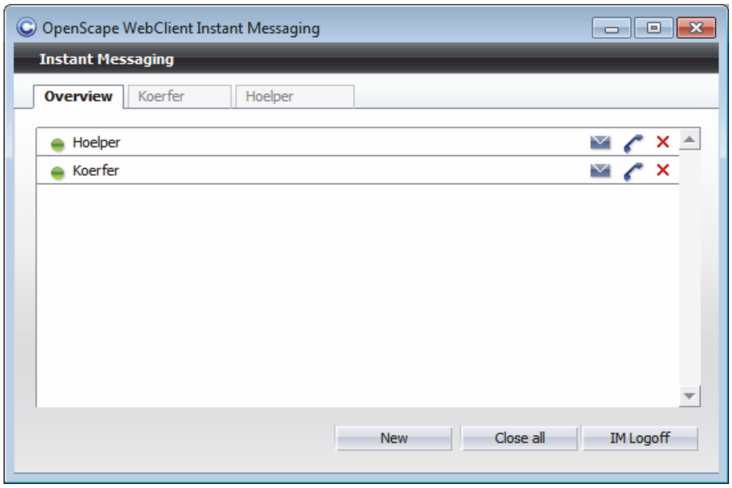
- With a click on , , in the row of the desired chat participant in the **Contacts** function window.
- With a click on in the row of the desired chat participant in the **Directory Search** function window after a performed contact search.
- By clicking the notifier toast displayed at the bottom right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

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

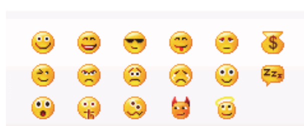
3.9.4.1 Controls in the “Instant Messaging” Dialog

Controls on the tab of an active chat connection

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

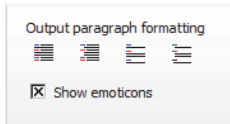


- - Opens the e-mail form of your default e-mail application for sending an e-mail to this contact.
- - Initiates directly a call to the displayed chat partner.
- - Deletes the message text displayed in the text window.
- - Closes the connection to the displayed chat partner.
- - You can insert various 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.

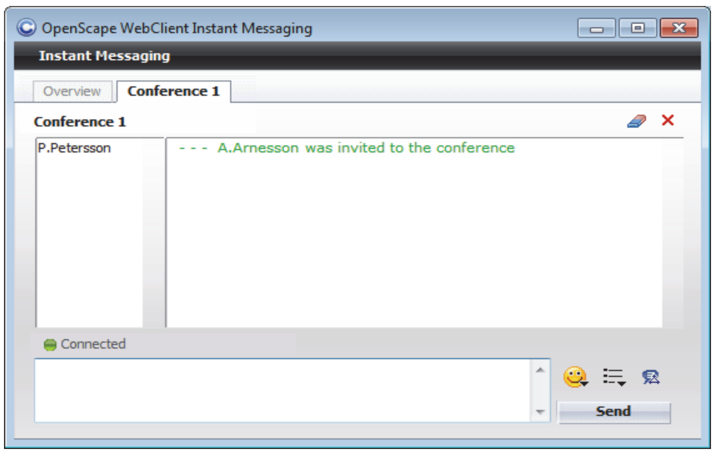


- - **Set output format**
  Via this option you can configure how the message text will be displayed. You have the following options for the output format (from left to right):
  – Text formatting as running text starting directly behind the send time.
  – Text formatting as running text indented around 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.



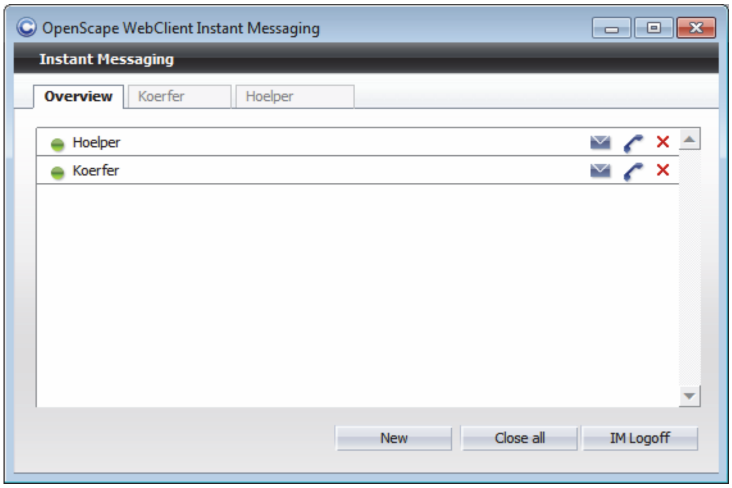
A click on opens a tooltip-like window for you to invite further chat partners. You have the following options:

– **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.

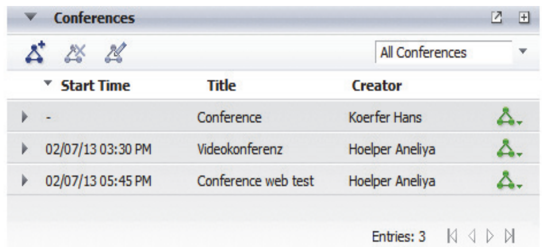


You reach the following functions via the **Overview** tab:

- - 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.

3.9.5 Conferences

You reach the **Conferences** function window by selecting the **Conferences** tab in the main window. The Conferences function window remains empty until you create at least one conference or have been invited for a conference. Thereafter, it 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.

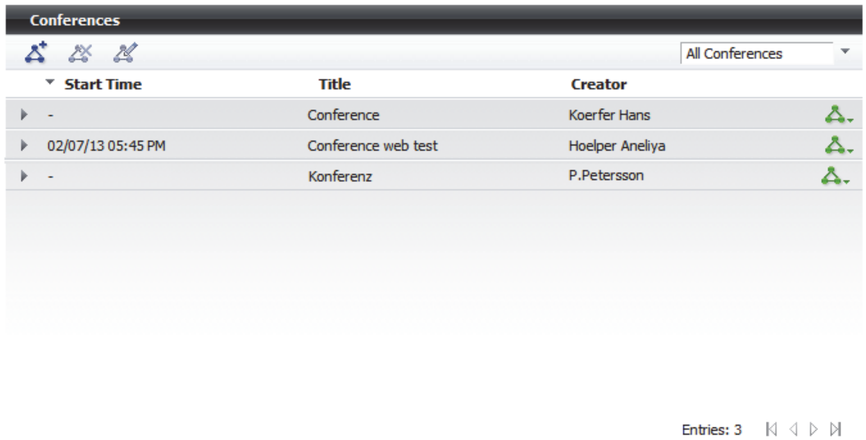


In this function window you can configure conferences, initiate already created conferences and modify or delete conferences you have created. It also lists all conferences you have created with the OpenScape Extensions for Microsoft Outlook application as well as those where you have been configured as participant.

> ***NOTICE:*** You can delete all conferences you have created with the OpenScape Extensions for Microsoft Outlook application from the conferences list displayed in the **Conferences** function window. The corresponding entries in your Microsoft Outlook diary are kept. You cannot start conferences from your Microsoft Outlook diary.

> ***NOTICE:*** You can open the **Conferences** function window also with a click on ▼ in the tab bar under the main menu. Select the **Conferences** option in the open selection list for this purpose.

With a click on **Pearl menu > View > Conferences** you can display the conference list as separate window.



3.9.5.1 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 realize via the connected PBX, you can use the following conference types:

- **Ad-hoc**
  An Ad-hoc conference is an audio 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. Subsequently, you can then expand this conference to a video and/or web conference.

  > ***NOTICE:*** You initiate Ad-hoc conferences only via 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 audio 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.

- **Video conferences**
  You can create video conferences in the **Conferences** function window by yourself and also participate in video conferences you have been invited for. In addition, you can take part in video-compatible Meet Me conferences created with the OpenScape Extensions for Microsoft Outlook application. To ensure video streaming, specific requirements must be met. These comprise for example free video licenses and operable video cameras. As soon as a video conference starts, the **Video** screen opens automatically. As long as only one participant is in the conference, a so-called "video-on-hold" is played by default. The user only needs to release sending his/her own video image for starting the video streaming.
- **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 something like the extension of a conference participant as PIN.

3.9.5.2 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**

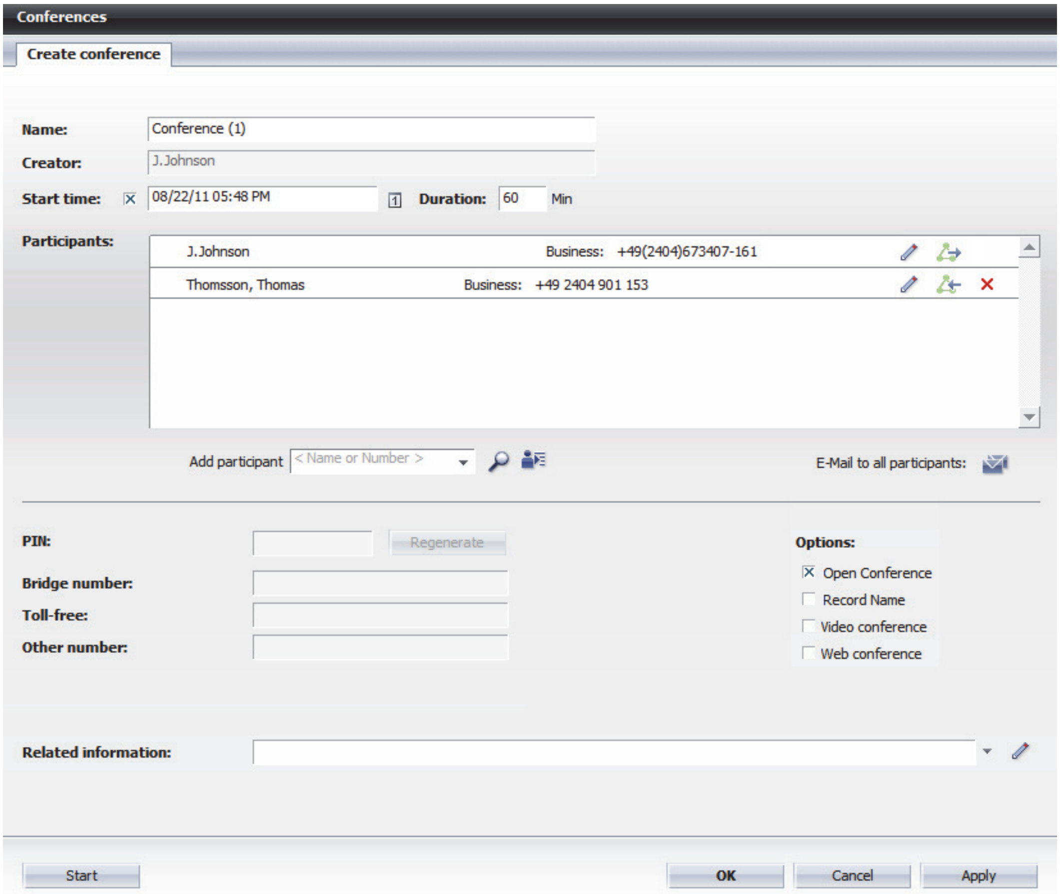
  Click on and select **View Conference** to display the connection data and control elements of an active conference in the **Call Control** window.

3.9.5.3 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 **Conferences** 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.

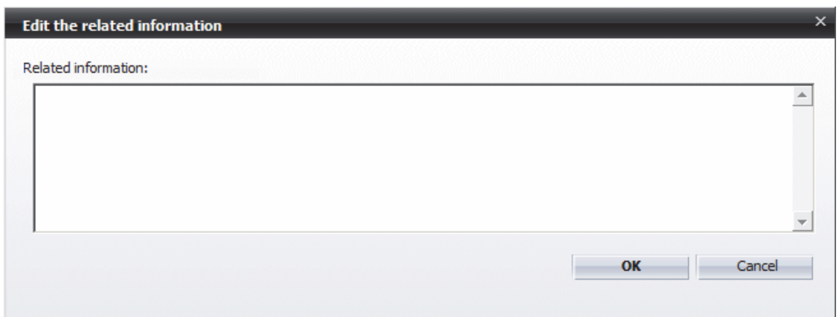
NOTICE: If you do not configure an e-mail address for the participant here, he/she will not receive a conference notification e-mail and thus no information about the conference access data.

- **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.

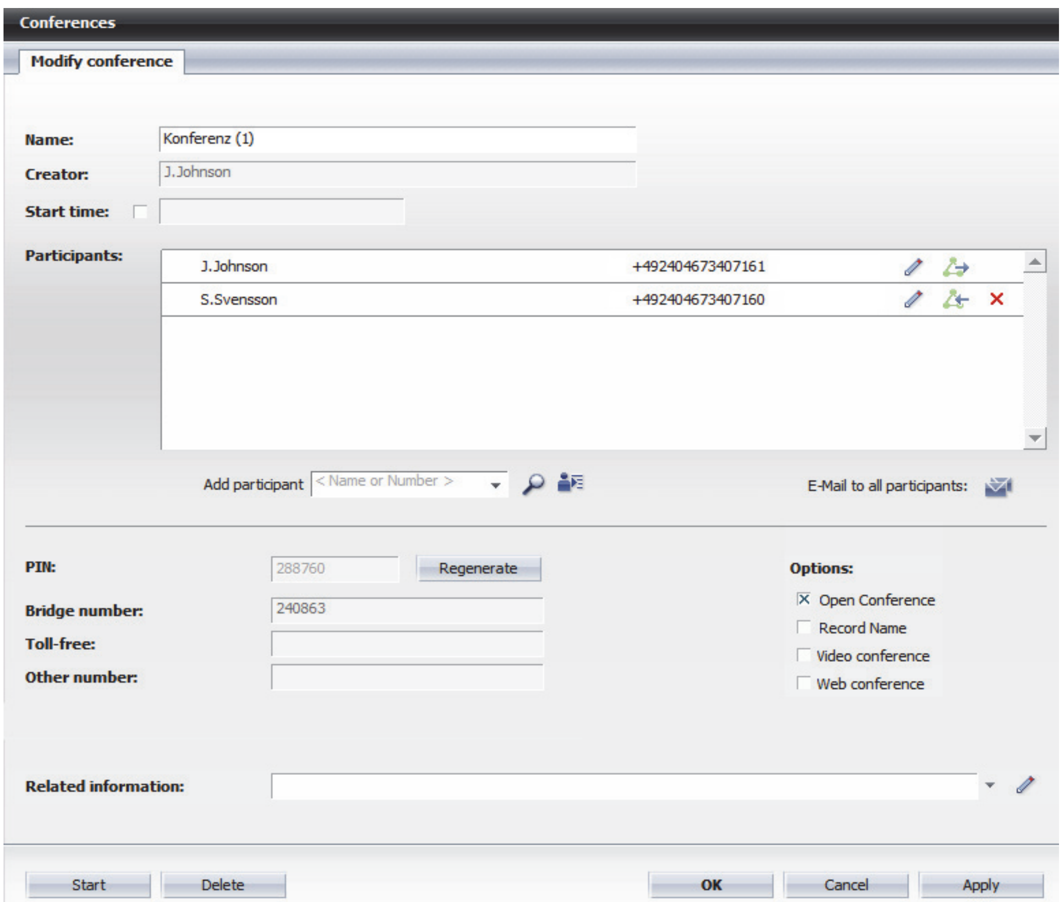
Configuration Options of an existing Conference

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.



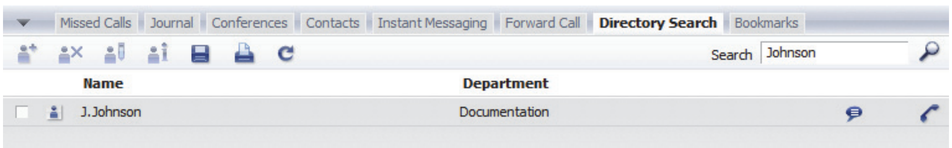
This dialog offers the same input fields, options and features like the dialog for creating a Meet Me conference and allows removing a conference from the conference list via the **Delete** button.

3.9.6 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 with a click on the Directory Search tab, which is displayed in the main window under the main menu. The **Directory Search** function window appears in the workspace of the main window.



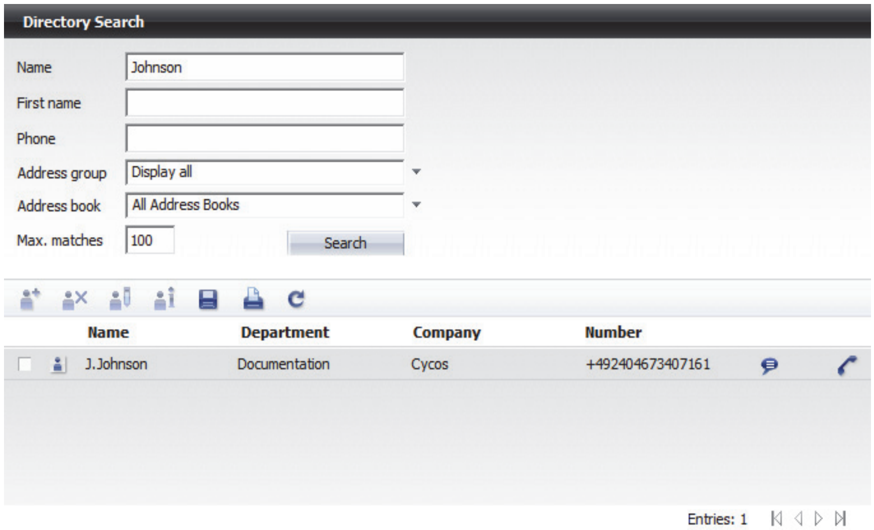
NOTICE: Alternatively, you can click on in the tab bar under the main menu and select the **Directory Search** option in the then open list.

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 **Pearl menu > View > Directory Search**. The extended view opens in a separate window and, 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 you wish to search.
- **Max. matches**
  Specify here the number of hits 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.

3.9.6.1 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.

3.9.6.2 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.

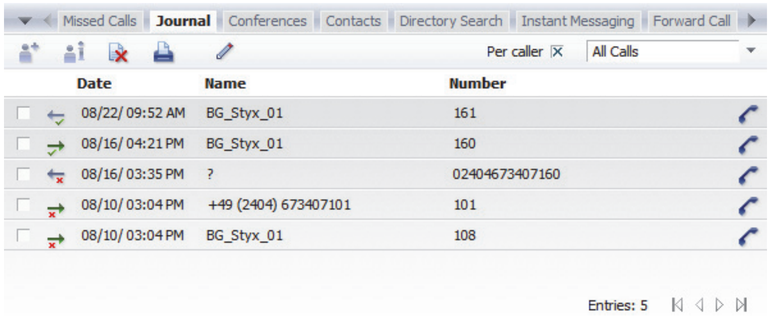
- **Reset search entry**
  To delete all entries in the **Search** input field, click on .

3.9.7 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

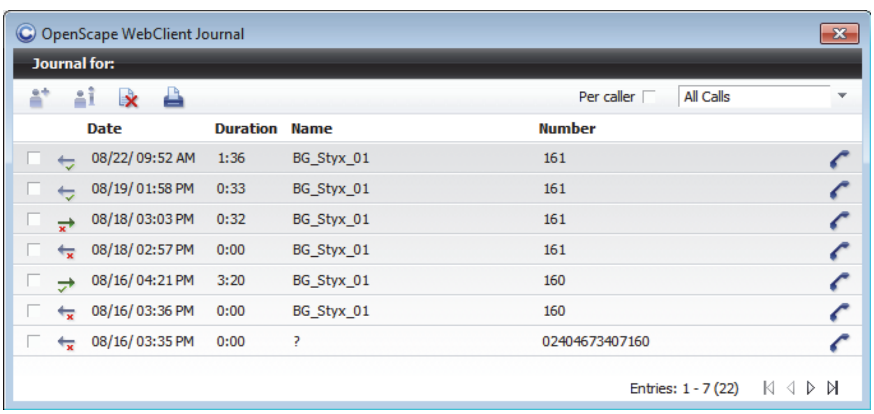
You reach the compact view of the **Journal** function window with a click on the **Journal** tab, which is displayed in the main window under the main menu. The **Journal** function window appears in the workspace of the main window.



NOTICE: Alternatively, you can click on ▼ in the tab bar under the main menu and select the **Journal** option in the then open list.

Extended view

You reach the extended view of the **Journal** function window via the **Pearl menu > View > Journal**. The extended view opens in a separate window and, in addition to the contact information represented in the compact view of the **Journal** window, it displays the contact attributes **Duration** and **Number**.



3.9.7.1 Information in the “Journal” Window

The **Journal** function window displays the following information about 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 invitation specifying that the system will call you to join the conference.
  – - Conference invitation specifying that you need to log on to 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 (in the extended view only).
- , 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 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**.

3.9.7.2 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.

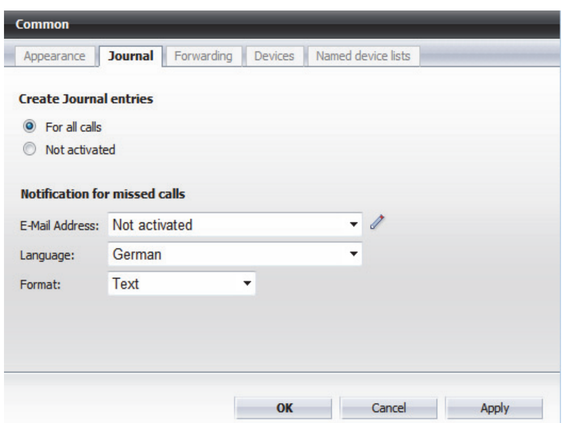
> ***NOTICE:*** Some features do not become active until you select a journal entry.

- **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.
- **Configure**
  A click on opens the following dialog with the settings for creating the journal entries and for the notification features.



  In this dialog you can activate/deactivate creating journal entries. Furthermore, you can determine whether to send a missed-calls notification, and if so, to which **e-mail address**, in which **Language** and in which **Format**.
- **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.

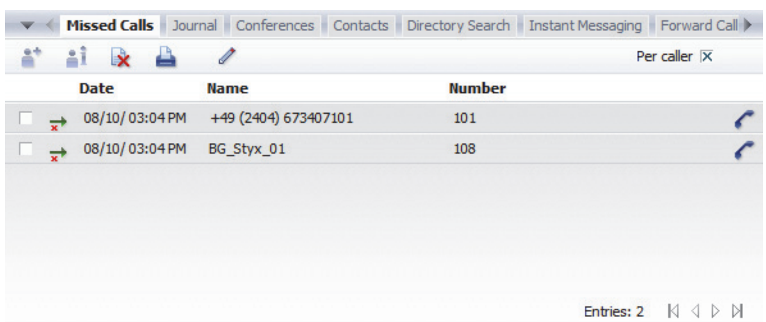
- **Combo box**
  Via the combo box on the right margin you can filter the journal entries according to the call type:
  - **All Calls** Default setting that shows all calls in the journal.
  - **Missed Calls** shows the unaccepted calls only. If a connection is established to this user at a later date, the call is no longer displayed as "missed".
  - **Incoming Calls** displays the inbound calls only.
  - **Outgoing Calls** displays the outbound calls only.

3.9.8 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 call type.

Compact view

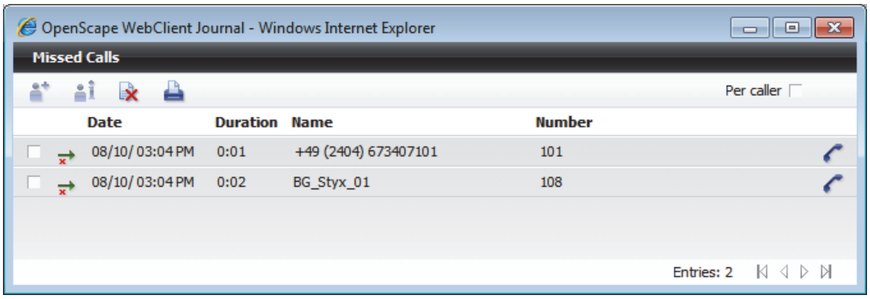
You reach the compact view of the **Missed Calls** function window with a click on the **Missed Calls** tab, which is displayed in the main window under the **main menu**. The **Missed Calls** function window appears in the workspace of the main window.



NOTICE: Alternatively, you can click on ▾ in the tab bar under the main menu and select the **Missed Calls** option in the then open list.

Extended view

The extended view of the **Missed Calls** function window is available via the **Pearl menu > Status Information > Missed Calls**. 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.



3.9.8.1 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.

- The caller's **Number** (extended view only)
- - 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 flagged with an additional small triangle. The journal row is then enlarged and shows all phone numbers under which this subscriber can be reached.

3.9.8.2 Controls in the "Missed Calls" Window

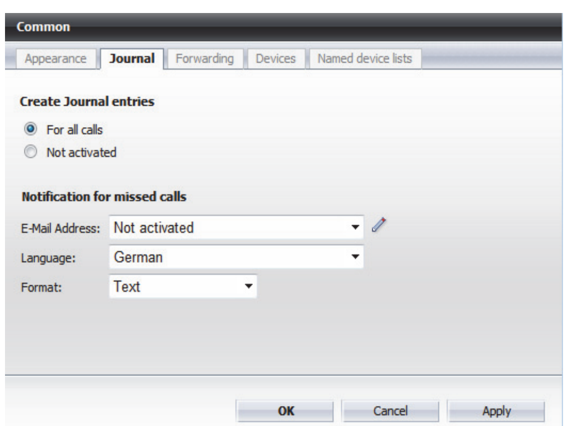
The following features are available to you in the toolbar of the compact as well as extended view of the **Missed Calls** window.

> ***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 entry 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.
- **Configure**
  A click on opens the following dialog with the settings for creating the journal entries and for the notification features.



In this dialog you can activate/deactivate creating journal entries. Furthermore, you can determine whether to send a missed-calls notification, and if so, to which **e-mail address**, in which **Language** and in which **Format**.

- **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.

3.9.9 Voicemail Box

You can send and receive voicemails if the system 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 with a click on the **Voicemail Box** tab, which is displayed in the main window under the **main menu**. The **Voicemail Box** window appears in the workspace of the main window.

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

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

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

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

3.9.9.1 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.

3.9.9.2 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.

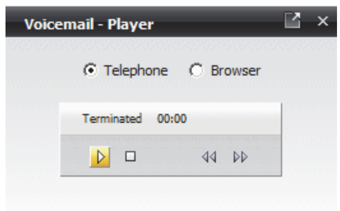
Under the toolbar of this function window you find the table header for the voicemail entries. With a click on the column description you can sort the journal entries ascendingly or descendingly by **Date**, **Name** and **Number**.

3.9.9.3 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

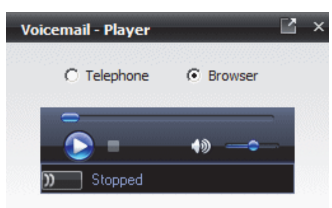
After picking up the receiver the following controls for voicemail playback by telephone are available:



- - 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.



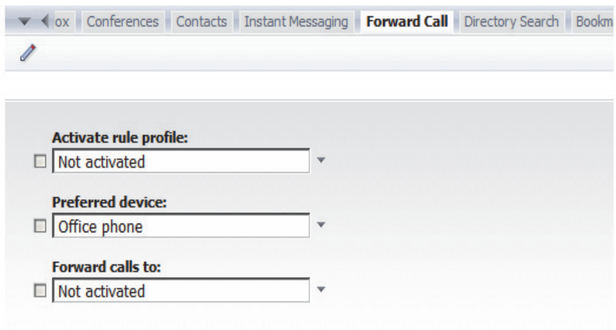
You can use the following controls for playback via the *Windows Media Player*:

- - 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.

3.9.10 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 **Forward Call** function window with a click on the **Forwarding** tab, which is displayed in the main window under the **main menu**. The **Forward Call** function window appears in the workspace of the main window.



This function window represents the compact view of the **Forwarding** tab, which 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 .

3.9.10.1 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.

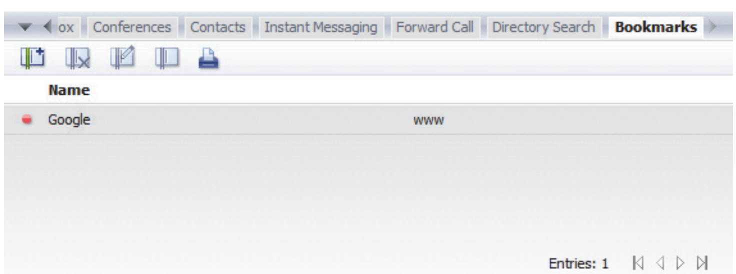
    NOTICE: This feature is only available for specific PBXs.

  – **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.

3.9.11 Bookmarks

You reach the **Bookmarks** function window with a click on the **Bookmarks** tab, which is displayed in the main window under the main menu. The **Bookmarks** function window appears in the workspace of the main window.



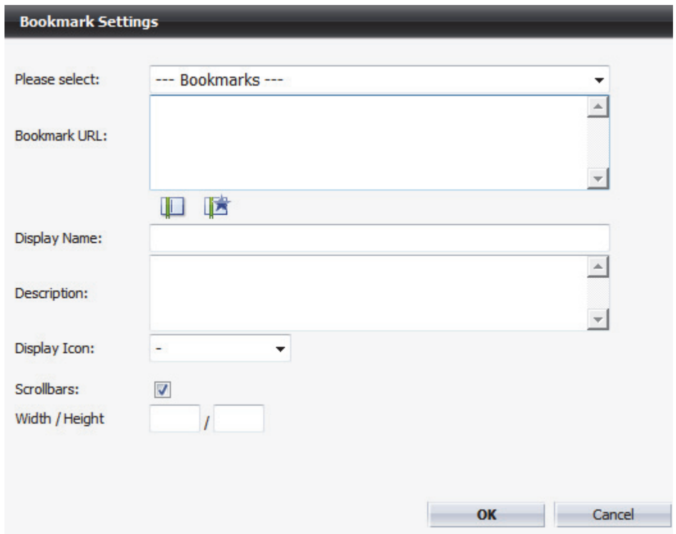
In this dialog you can default bookmarks or open internet pages via bookmarks already specified.

3.9.11.1 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.

3.9.12 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:

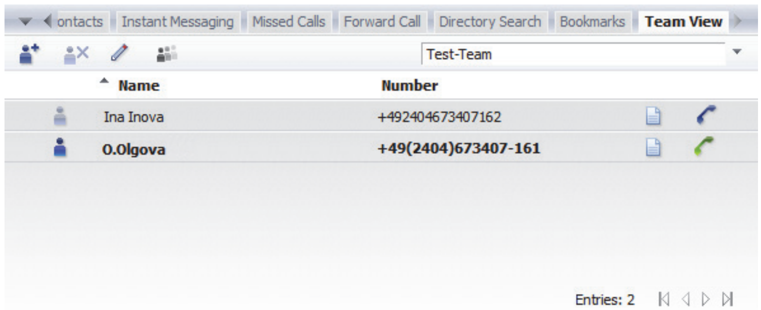
- Team administrator
  A team administrator is an OpenScape UC Application user who is privileged to manage the team. This includes adding new members to the team and removing members from the team. Every OpenScape UC Application user may adopt the Team Administrator role. A team can have several members 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.

3.9.12.1 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.

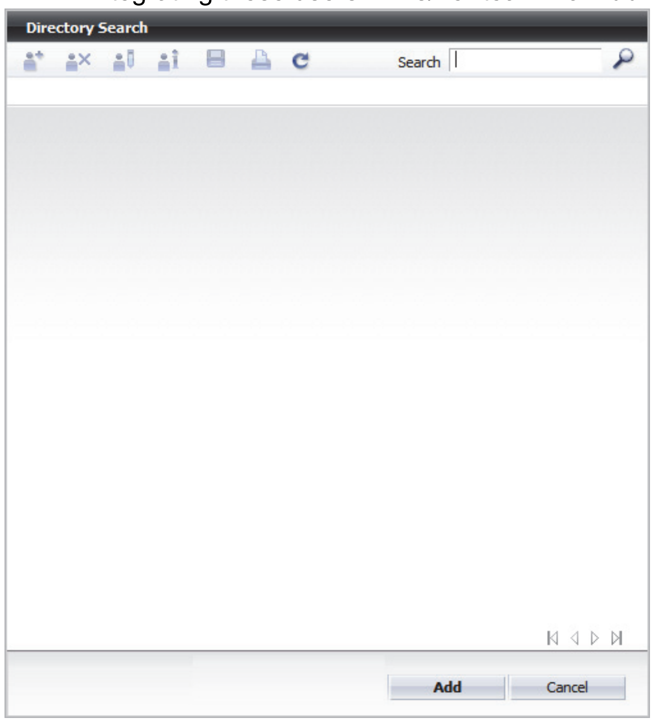
Depending on the OpenScape UC Application user profile (Team or/and Team Administrator) assigned to you, the **Team View** provides various features and information.



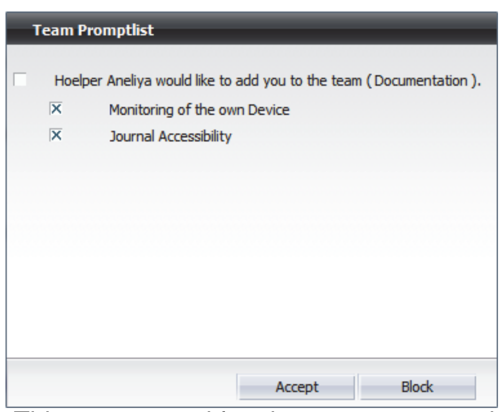
- **Search for team members**

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:

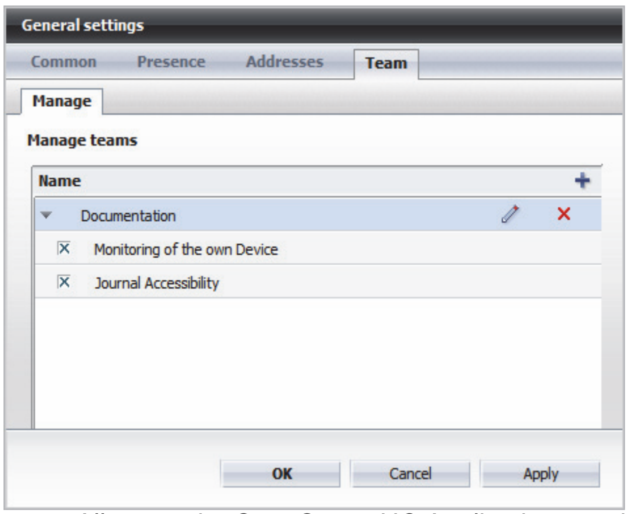


This prompt enables the new team member to decide whether or not to be integrated in the team. In addition, he/she can specify whether other team partners may access his/her journal entries or monitor his/her telephone status.

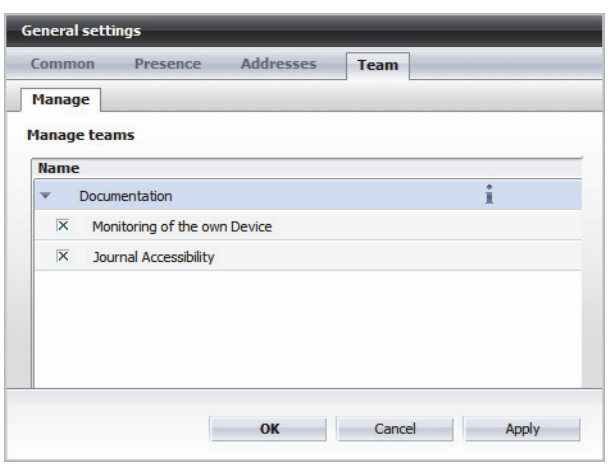
NOTICE: Inbound team prompts are signaled in the **Pearl menu**

> 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.

3.10 Video Telephony (SIP only)

Parallel to a voice connection you can also exchange images of the connection partners. This requires an operable video camera on your and your communication partners' side, a sufficient number of free video licenses and adequate bandwidth as well as configuring a video scheme in the **SIP Service Provider** settings.

If the above requirements are complied with, you can use the video telephony features as follows:

- You can switch the video image to an existing audio connection.
  When your connection partner complies with the video transmission requirements, you receive the video image of your connection partner automatically, no matter whether a video camera is installed or switched on at your station. This requires the **Video Viewer** module to be active. Your own video image or the one sent to your connection partner as well as the video image received from your connection partner appear in the **Video** window.
- By activating the video call feature via the icon in the Softphone menu you can automatically set up a video and audio connection to the desired conversational partner. A video call is automatically initiated only if both conversational partners have activated the icon for enabling/disabling the video call feature at the time the call shall be made. If they have done so, the **Video** window opens automatically on both sides. The partners' own video image is being transmitted and they receive the image of the respective other partner. The default view of the video window currently displayed depends on the settings in the **Default video configuration** of the **SIP Service Provider**.

> ***NOTICE:*** The video transmission or screen resolution quality may change during an active call. Such changes result from the bandwith for transmitting video data streams automatically adjusting to the available bandwidth resources of the communications system.

> ***NOTICE:*** If the SIP communications system does not provide a sufficient amount of free bandwidth, no video call can be set up and no active call an be expanded to a video connection. A corresponding message informs the user about this fact.

3.10.1 Video Features

The video telephony feature enables using the following functions:

Camera image

The camera image function opens your own video image in the **Video** window. You can perform camera image settings in the **Settings** dialog on the **Advanced > SIP Service Provider > Video schemes** tab. For example, you can configure whether the camera image or your own video image is automatically switched on at every program start or switched on/off with a click on in the Softphone menu. Your connection partner does not see this image. In addition, there are two options for you to represent your own image: mirrored and unmirrored. By default, you see your own video image mirrored, but it is transmitted unmirrored to the connection partner. The following figure shows an example of the **Video** window in which the camera image was automatically switched on at the program start. As long as there is no connection that transmits the video image of the connection partner, you can switch the camera image off with a click on the **Close (x)** button in the screen's top right corner or on in the Softphone toolbar. This also closes the **Video** window.

Receiving a video image

Received video images are always accepted and represented independently from an installed or active video camera. This, however, requires the **Video Viewer** module to be active. The representation of received video images cannot be suppressed or switched off. As long as your conversational partner sends his/her video image, the **Video** window stays open. There is no way you can close the **Video** window.

The next figure is an example of the **Video** window during an active call conducted between two connection partners. They receive the image of the respectively other participant, but do not yet send a video image by themselves.

Sending a video image (point-to-point video)

To send video images you need an installed and configured video camera as well as a video scheme defined in the **SIP Service Provider** settings. The video streaming can be switched to an audio connection only retrospectively. This applies for the caller as well as for the callee. During a call, a unilateral or a bidirectional video transmission may take place.

You start sending your own image with a click on in the Softphone toolbar of the video window. Your own video image appears in a red frame.

Another click on in the Softphone toolbar abandons sending your video image. You can then still see the image of your connection partner. After the active call has been terminated, video streaming comes automatically to an end too and you see only your own image in the Video window.

> ***NOTICE:*** While a video connection with mutual video streaming is up, you cannot close the Video window. You can merely disable the preview of your own video image via the Softphone toolbar with a click on .

Controls in the Softphone toolbar

You find the Softphone toolbar of the **Video** window at the bottom margin of the **Video** window where it provides the following features:

- Switch microphone on/off

> ***NOTICE:*** This icon stays inactive (grayed out) as long as there is no connection.

A click on the icon mutes the microphone. The icon then changes to . A click on the icon undoes the muting.

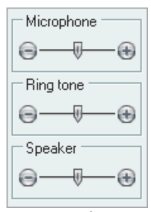
- Switch voice recording on/off

> ***NOTICE:*** This icon stays inactive (grayed out) as long as there is no connection.

A click on activates the conversation recording. The icon then changes its color from gray to orange.

- Display volume settings

A click on opens the following menu:



In there you can set the volume for **Microphone**, **Ring tone** and **Speaker** independently from your respective conversational state.

> ***NOTICE:*** Depending on the operating system these icons are not visible because performing such settings is only possible via the operating system settings.

- Hide/display DTMF keypad

NOTICE: This icon stays inactive (grayed out) as long as there is no connection.

A click on displays the following keypad:

During an active call you can use this keypad to dial a phone number or select other options (sending DTMF characters), for example when using an answering machine, playing voicemails, etc.
You can enter DTMF characters in the DTMF dialing keypad also via computer keyboard or by copy&paste.

- Start/stop video streaming

NOTICE: This icon stays inactive (grayed out) as long as there is no connection.

A click on starts the transmission of your video image. The icon then changes its color from gray to orange. Your own image is represented in a red frame at the bottom left margin of the **Video** window. Another click on this icon stops video streaming.

- Switch camera image on/off
  A click on activates the camera image. The icon then changes its color from gray to orange. Another click on this icon deactivates the camera image.
- Toggle video player views
  With a click on you can change the layout in the **Video** window. The following three views are available:
  – **In call**
  – **Full window**
  – **Full screen**
  – Switch video call on/off (SIP only)

3.10.2 Behavior of the Video Streaming

The video streaming behavior follows the changes analog to the audio transmission:

- **Call is on-hold**
  When a call is held, the video streaming stops as well. The held subscriber does not see a video screen. If the video streaming status changes during a held call, the restoration of the connection follows this change. If, for example, the camera is switched off, the video streaming is inactive when the call is resumed.
- **During a consultation call**
  The video streaming status changes during a consultation analog to a held call.
- **Toggling**
  When you toggle the active and held subscriber, the video streaming to the active subscriber is held and resumed to the held subscriber. The **Video** window shows only your own video image and the one of the respective subscriber. The video statuses of the two connections are independent from each other in this case. In other words, if the video streaming status of one connection is changed, it does not affect the other connection.
- **Transferring a call**
  When a call is transferred, the video installation and configuration of the subscriber to be transferred and of the new subscriber decides whether no, a unilateral or a bidirectional video connection exists.
- **Video conference**
  You can create video conferences in the **Conferences** function window by yourself and also participate in video conferences you have been invited for. In addition, you can take part in video conferences that were configured with the OpenScape Extensions for Microsoft Outlook application.

  After the video conference start, the **Video** window opens automatically. As long as only one participant is in the conference, a so-called "video-on-hold" is played by default. The conference participant only needs to release transmitting his/her video image for starting the video streaming. The **Video** window represents two video images: your own in a red frame and one in which you can mix the video images of the other participants. The conference portal provides different video layouts for the mixed image.

3.10.3 Views of the Video Window

The OpenScape Desktop Client video window provides three default views: **In call**, **Full window** and **Full screen**. In addition, the video feature of OpenScape Desktop Client enables you to customize video window views. You can specify in the **Settings > Advanced > SIP Service Provider > Video schemes** dialog whether to switch the camera image automatically on at the program start and which view of the video window to display during an active video connection by default.

> ***NOTICE:*** The figures shown in the following are examples. They help the user to imagine possible default views of the **Video** window.

In call

During an active video connection the **Video** window contains two images by default: your own (sent image) and the one of the connection partner (received image). The image of the connection partner appears in a larger frame than your own image and is represented slightly turned. Your own image is displayed in a smaller frame at the bottom left window margin. It is slightly turned and appears in a red frame during an active image transmission.

In the **In call** view the **Video** window may contain just one image, for example:

- If you have disabled the camera image, the **Video** window contains in the **In call** view only the image received from the connection partner. This image appears centered and in a frame .

- If the connection partner has not yet activated his/her video transmission, the **Video** window contains in the **In call** view your own image only. This image appears centered and in a frame .

Full window

In this view the **Video** window may contain one or two images. The image received from the connection partner always appears centered and without a frame. Your own image is displayed in a smaller frame at the bottom left window margin. It is slightly turned and appears in a red frame during an active image transmission. The following figure shows for example the **Video** window in the **Full window** view when the image of the conversational partner is received. Your own image is transmitted but the camera image is disabled.

If you activate the camera image in addition, the **Video** window in the **Full window** view may look as follows:

Full screen

In this view the **Video** window may contain one or two images. The received image occupies the entire screen. If the camera image is active, your own image appears bottom left. The Softphone toolbar is hidden and only displayed again at the bottom screen margin when you position the mousepointer on it.

Customized views

The video feature of the OpenScape Desktop Client enables you to customize the default view **In call**.

- Moving a video image in the video window
  To change the position of an image in the video window, click in the center of the video image. The mousepointer appears in the center of the image. Keep the left mousebutton pressed and drag the image to the desired position in the video window. Then release the mousebutton.

  NOTICE: While you adjust a video image, it appears transparent.

- Maximizing/minimizing the video image
  Click on one margin of the image frame, keep the mousebutton pressed and drag the mousepointer in the desired direction to maximize or minimize the image.
  You can also rightclick the center of an image, keep the right mousebutton pressed and move the mouse up and down. The proportions of the selected video image become smaller or larger.

  NOTICE: While you adjust a video image, it appears transparent.

- Turning the video image
  Rightclick the center of an image, keep the mousebutton pressed and move the mouse to the left or right. The image turns to the corresponding direction.

  NOTICE: While you adjust a video image, it appears transparent.

The changes you perform for the **In call** view are automatically applied to current operation. Whether such changes are kept to be used at the next program start or dismissed when you shut the program down depends on the configuration of the **SIP Service Provider** module. The view used last is saved when you shut OpenScape Desktop Client down and deployed again at the next start of the program if item **Keep previous** is selected for the **Layout** option in the dialog **Settings > Advanced > SIP Service Provider > Video schemes**. Otherwise, only the three pre-defined views will be available when you start OpenScape Desktop Client again.

Video conference layouts

Depending on the configuration, the video window contains during an active video conference up to two video images: your own, sent image (if active) and an image in which you can mix the video images of other participants. For the mixed video image you can choose from the following layouts provided by the conference portal:

- **Tiled**
  The transmitted video sequences of all conference participants are displayed on the video screen in tiles of the same size.
- **Active Speaker**
  The video sequence of the currently active speaker is highlighted by representation in a bigger tile. In addition, the transmitted video sequences of all conference participants are displayed on the video screen in tiles of the same size.
  By default, the image of the currently active speaker reacts delayed to switching the person who conducts the conversation. This prevents the image of the active speaker from changing too often.

  > ***NOTICE:*** The sensitivity with which the image of the active speaker reacts to switching the person who conducts the conversation is a system setting that the system administrator can change.

- **Single**
  Only the video sequence of the currently active speaker is displayed on the video screen.

The respective video conference participant does not see his/her own video sequence in a video tile by default. The user may add his/her own video sequence via the menu in the video window (**Layout > Self-View**).

The video tiles of participants who have left the conference are kept up for a while in the video window (grace period). The grace period is defaulted by a system setting. It enables the conference participant to dial back into the conference at a later date. The still open video tiles show the image sent last by the respective participant in black/white during the grace period. This indicates to the other participants that the grace period is being active.

Conference participants whose video tile shows a video animation have either not released their video streaming or a defective video camera.

3.10.4 Controlling a Video Conference via Video Menu

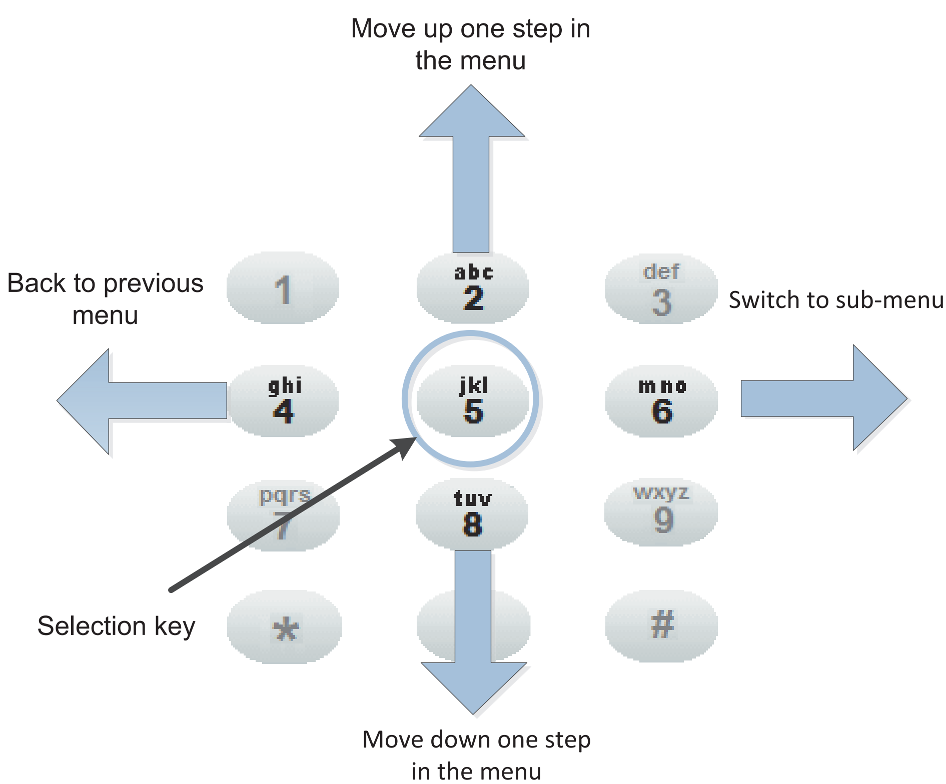
This section describes the options you have to control a video conference via the video menu.

During a video conference you can use the default keypad of your phone or the DTMF dialing option in the Softphone menu to display a video menu on the video screen and to trigger conference control functions.

Open the video menu via the key command 0 0. Then select the functions you wish to edit. If you do not make an entry in the menu, the menu view is displayed for 20 seconds. After this period, the video menu closes automatically.

NOTICE: To hide the video menu manually, enter 0 0 once again.

The following overview shows how the menu selection functions are assigned to the phone or DTMF keys:



Key	Function
abc 2	Move up in the menu list.
ghi 4	Move back one menu level from a sub-menu.
jkl 5	Trigger the currently selected function.
mno 6	If available, open the associated sub-menu.
tuv 8	Move down in the menu list.

The displayed video menu provides the following function menus:

- **Conference**
  This menu lets you apply the following functions to the conference:
  - **Participants**
    Select this function for displaying the participant list for a conference. Via the 0 0 command you can hide the participant list again.
  - **Mute**
    Select this function for muting the entire conference. Invoking this function once more undoes the muting. The current muting status of the conference is displayed in the status window (head-up display) **Conference Information** in the top right area of the video screen.

    NOTICE: In case of a moderated conference only the moderator can mute the entire conference; in open conferences all conference participants can mute a conference.
  - **Lock**
    Select this function if you do not wish any further conference participants to join in. Invoking this function once more undoes this restriction. The current locking status of the conference is displayed in the status window (head-up display) **Conference Information** in the top right area of the video screen.

    NOTICE: In case of a moderated conference only the moderator can lock the conference; in open conferences all conference participants can lock the conference.
- **Layout**
  This menu lets you set the representation mode on the video screen. The system configuration determines which options are available in this menu.

  NOTICE: If you change the layout setting, it changes for all conference participants.

- **Tiled**
  The transmitted video sequences of all conference participants are displayed on the video screen in tiles of the same size.
- **Active Speaker**
  The video sequence of the currently active speaker is highlighted by representation in a bigger tile. In addition, the transmitted video sequences of all conference participants are displayed on the video screen in tiles of the same size.
- **Single**
  Only the video sequence of the currently active speaker is displayed on the video screen.
- **Self-View**
  You can use this option to display your own video sequence in addition to the video sequences of other video conference participants. If you invoke this function once more, displaying your own video sequence will be disabled to restore the defaulted state.

• **Options**
  You can use this menu to see conference and video streaming information.
  - **Conference Information**
    Select this function is you wish to display the status window (head-up display) with information about the current conference on the video screen.
    In this status window you see the following information (from left to right):
    - Name display of video-incompatible conference participants
    - Conference locked/unlocked icon
    - Conference muted/unmuted icon
    - Conference duration display
    - Number of video-incompatible conference participants
    - Number of video-compatible conference participants
  - **Video Information**
    Select this function is you wish to display the status window (head-up display) with video streaming information on the video screen.
    In this status window you see the following information (from left to right):
    - Resolution of the video signal on the current device
    - Encoder quality of the video signal in percent
    - Bandwidth for the received video signal
    - Number of data packages sent for video streaming
    - Number of complete data packages for the decoder (iFrames)

NOTICE: The video transmission or screen resolution quality may change during an active call. Such changes result from the bandwith for transmitting video data streams automatically adjusting to the available bandwidth resources of the communications system.

When operating the displayed menu please heed the following points:

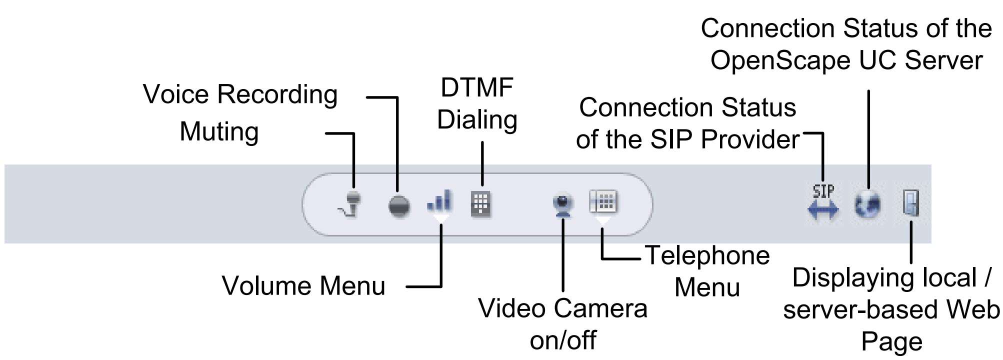
- Each conference participant has his/her own menu. In other words, he/she is the only one to see and operate this menu.
- An inactivity timeout is implemented for displaying the menu. In other words, if nobody uses the menu for a specific period, it closes automatically. The system default for this inactivity timeout is 20 seconds.

> ***NOTICE:*** Please also note the operating restrictions conditioned by the conference type (moderated conference/open conference).

3.11 Softphone Menu

You find the Softphone menu at the bottom margin of the main window. Depending on the hardware and user settings, different functions are displayed there.

The following figure is an example of the Softphone menu when the program is connected to an SIP communications system (OpenScape Voice) and used as SIP softphone.



In the following we describe all functions provided in the Softphone menu:

Softphone functions

- / Muting on/off
  Activates and deactivates the muting of an existing connection.
- **Voice recording (SIP only)**
  Activates or deactivates the voice recording function. You find the recorded conversation in the following folder:

```
My Documents\My Music\VoiceRecordings
```

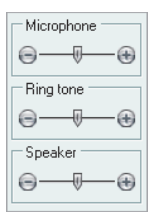
- **Speaker**
  Activates or deactivates the speaker during an active call or in idle state

> ***NOTICE:*** This feature is available if for example plathosys CT-180/220/Headset is used as audio device and **plathosys CT-180/220/Headset** is selected under *Control* in the corresponding audio scheme.

- **Headset**
  Switches the headset on/off in case of an active call or in idle state

> ***NOTICE:*** and the headset volume control are only available if you use a terminal device with appropriate signaling and this audio device was configured in the active audio scheme.

- **Additional speaker**
  Switches the additional speaker on/off in case of an active call or in idle state. The additional speaker must be configured in the settings for the currently used audio scheme.
- **New Audio Device**
  This button appears only if a new audio device is connected during operation. It allows you to integrate the new device in a new audio scheme and to connect and use the audio scheme or the new device. The program need not be rebooted for this purpose.
- **New Video Device**
  This button appears only if a new video device is connected during operation. It allows you to integrate the new device in a new video scheme and to connect and use the video scheme or the new device. The program need not be rebooted for this purpose.
- **Volume menu**



Open the volume menu depicted above with a click on to set the volume of **microphone**, **ring tone**, **loudspeaker** and **additional loudspeaker** (if configured) independently from your respective call state. Here you can adjust the volume of the relevant audio device.

> ***NOTICE:*** Depending on the operating system these icons are not visible because you can perform such settings only via the operating system settings.

- **DTMF dialing**

  Click on . The following keypad is displayed.

  During an active call you can use this keypad to dial a phone number or select other options (sending DTMF characters), for example when using an answering machine, playing voicemails, etc.
  You can enter DTMF characters also via the computer keyboard or by copy&paste. Copy the desired content (for example PIN, phone number, etc.) by simultaneously pushing **[Ctrl] + [C]** to the clipboard. Then click on . Paste the copied content via **[Ctrl] + [V]** in the **DTMF dialing** keyboard. Enable at the top right margin on the **DTMF dialing** keyboard for sending this content. The selected DTMF characters are displayed at the top left margin of the **DTMF dialing** keypad.

- **Video camera preview on/off (SIP only)**

  > ***NOTICE:*** This icon is only displayed if you operate the program at an SIP communications system (OpenScape Voice) and have an operable video camera currently used by a video scheme of the **SIP Service Provider**.

  A click on this icon activates or deactivates the preview of your own video image.

- **Switch video call on/off (SIP only)**

  > ***NOTICE:*** This icon is only displayed if you operate the program at an SIP communications system (OpenScape Voice) and have an operable video camera currently used by a video scheme of the **SIP Service Provider**.

  The state of this icon – active or disabled – specifies whether or not video resources are reserved during the connection setup. It thus determines whether the call shall be initiated as video or pure audio call.
  The icon for activating/disabling the video call feature is inactive by default, i.e. the feature is in idle state. Consequently, all calls are set up as pure audio connections. However, you can extend such connections to video connections via the icon in the Softphone toolbar at a later date.
  If the icon for activating/disabling the video call feature is enabled, each call is automatically initiated as video or audio connection depending on the state of this icon on the conversational partner's side. If both partners have activated this icon, a video connection is automatically switched to the audio

connection. The **Video** window opens automatically. The video images of the conversational partners are being transmitted. The displayed video view corresponds to the **Default video configuration** in the **Settings** dialog on the tab **Advanced > SIP Service Provider > Video schemes**.

If only one of the two conversational partners has activated the video call feature, a message in the automatically opened **Video** window informs him/her that the other one does not wish to set up a video connection. The subscriber who has activated the icon sees only his/her own image in the pre-set view of the **Video** window. It is not automatically transmitted. In this case, supplementing the audio transmission with video via the icon at a later date is not possible.

- **Telephone menu**

  Click on to display a menu with the following features:

  – **Directed call pickup**
    This feature allows you to accept calls that are designated for someone else. If, for example, your colleague is called but he/she cannot accept the call himself/herself (he/she is in a meeting, on the phone on another line, etc.), select the **Directed call pickup** option. In the open dialog of the same name enter the phone number of the device with the alerting call. Click on **OK**. You are connected to the caller.

  – **Voice recording**
    Activate/deactivate the **Voice recording** option to activate or deactivate recording the conversation. You find the recorded calls in the folder `My Documents\My Music\VoiceRecordings`.

  – **Ringer cutoff**
    When you activate the **Ringer cutoff** option, the program will signal incoming calls without ring tone.

  – **Second call without tone**
    This option corresponds to **Call waiting**, but no call-waiting tone is played.

  – **Do Not Disturb**
    Click on the **Do Not Disturb** option if you do not want to receive any calls. The caller receives a busy tone.

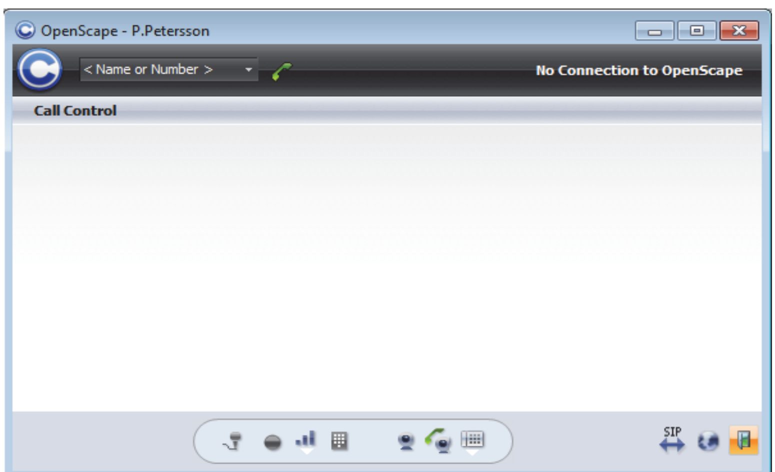
  – **Call waiting**
    When the **Call waiting** option is active, another call that comes in during an active call is signaled by a so-called call-waiting tone. The caller hears a normal ringing tone and no busy tone. You can then accept, ignore or reject the second call. To accept the second call, click on the green handset icon. The active call will then automatically be held.

– **Disable callback**
This option allows you to disable the callback service that is active in the **Call Control**.

NOTICE: The PBX used and its settings determine whether or not this feature is displayed in the phone menu.

Status information

- / or / indicates that the connection to the SIP or HFA communications system exists or does not exist.
- or indicates that the connection to the OpenScape UC Application server exists or does not exist. Consequently, you can or cannot use the OpenScape UC Application features (for example the presence and conferencing function).
- or Clicking this icon you can toggle the view of a local or server-based web page in the workspace.
The local web page opens automatically when the OpenScape UC Application server fails and looks as follows:



The program then works in the so-called local mode and can only be used as SIP or HFA softphone. You cannot access the OpenScape UC Application features.
Switching to the local web page manually is useful in the following scenario, for example:
You have used your SIP softphone number for logging on to the OpenScape Voice. During the login procedure you have entered this phone number in the **User** field of the **Settings** dialog on the tab **Advanced > SIP Service Provider > Main line**. After you have logged on to the OpenScape UC Application server also, you use your office phone as preferred device which has been assigned your *ONS* number. When a caller dials your softphone number, the inbound connection is only signaled at the connected headset. The **Call Control** window does not open and the call is not signaled in the program. In this case there are the following options to accept the call:

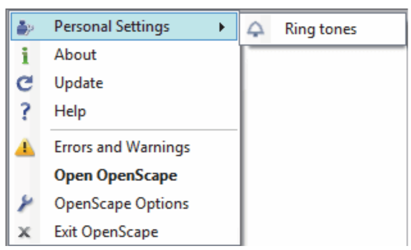
– With a click on in the desktop notification, which appears at the bottom right margin of your desktop.
– By switching to the local web page via the icon in the Softphone menu. The incoming call is displayed and you can accept it with a click on .
You can terminate the active call only via .

3.12 OpenScape Icon in the Notification Area

The OpenScape icon is a display that appears in the notification area of the Windows taskbar. Within this icon you can also see the current presence status of a user, i.e. the OpenScape icon changes its appearance according to the currently defined presence status. For example, is displayed, when the program has been started and the user is **available**.

3.13 Context Menu of the Program

Rightclick the program's icon (for example) in the notification area of the Windows taskbar to open the context menu.



This context menu provides the following features:

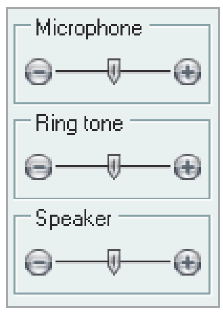
- **Personal Settings**
This option allows configuring an individual ringtone (`WAV` or `MP3` format) for signaling incoming calls. It opens the **Advanced** tab in the **Settings** dialog. On this tab you can, depending on the communications system (SIP or HFA) used, select the desired ring tone under **SIP Service** or **HiPath Provider > Ring tones**.
- **About**
You use this option to open the **Product Information** window and to display the program's version number.
- **Update**
Establishes a connection to the latest program version that your system administrator has downloaded. If no program update is available, a message informs you accordingly.
- **Help**
Opens the help file for the entire application.

- **Errors and Warnings**
  When loading a module is accompanied with an error, the **Errors and Warnings** item appears in the list of context menu options. Selecting this option displays the **Current Error Report** window. This report contains further information about these errors.
- **Open OpenScape**
  Selecting this option or doubleclicking the icon in the notification area of the Windows taskbar moves the program's main window to the foreground of the desktop.
- **OpenScape Options**
  Selecting this option opens the **Settings** dialog and the current configurations of the program are displayed. You can only change the **Audio Schemes** and the following settings on the **Advanced** tab:
  - **General > General**
  - **General > Program Start**
  - **General > Task Bar and Notification Area**
- **Exit OpenScape**
  This option serves for closing the application.

3.14 Audio Control Operating Elements

When you integrate an audio scheme in OpenScape Desktop Client, various audio icons are displayed in the main bar depending on the hardware and user settings. Using these audio icons you can quickly and effectively activate the corresponding features:

Icon	Function / Meaning
	**Lift receiver** (handset or another provided audio device) • In case of an active connection request, for example an incoming call: accept call and set up connection. • In idle state: activate handset or another provided audio device.
	**Hang up** (handset or another provided audio device) • In case of an established connection: close connection. • In the system menu: finish scrolling, return to idle state.
 	**Microphone on/off** • In case of an established connection: activate or deactivate audio device muting.
	**Loudspeaker on / off** • In case of an established connection or in idle state: activate or deactivate speaker.
	**Headset on / off** • In case of an established connection or in idle state: activate or deactivate headset operation.

Icon	Function / Meaning
	**Volume control** Move control to the right (louder) or to the left (softer) to set the volume: • **Ring tone** - when the OpenScape Desktop Client is in idle state or a connection request is received. • **Speaker** - in case of an established connection with activated speaker. • **Handset** - in case of an established connection with activated handset and deactivated speaker. • **Headset** - in case of an established connection with activated headset and deactivated speaker.
	**"Volume" menu** Open the "Volume" menu with a click on the "Volume" button (to the right of the slider) to set the **microphone**, **ring tone** and **speaker** volume independently from your respective call state in OpenScape Desktop Client. Here you can adjust the volume of the relevant audio device. Depending on the operating system, these icons are not visible because performing such settings is only possible via the operating system settings.
	**Additional speaker on / off** If your computer has an operable additional speaker and this speaker is configured in the settings for the current audio scheme, you can activate or deactivate it with a click on the "additional speaker" icon.

NOTICE: The  **headset** icon and the headset volume control are only available if you use a terminal device with appropriate signaling and this audio device was configured in the active audio scheme.

3.15 IBM Lotus Notes Integration

If the IBM Lotus Notes client is already available on the computer when you install OpenScape Desktop Client, you can use the IBM Lotus Notes Integration feature after the setup. It expands the toolbar of the IBM Lotus Notes client by the **Dial** button.

If the OpenScape Desktop Client is integrated in your IBM Lotus Notes client, you can initiate a call from your private or global IBM Lotus Notes address book:

In this process, all phone number information contained in the IBM Lotus Notes address book for the selected contact is transferred to OpenScape Desktop Client. If several phone numbers are available, you need to select one of them for setting up a connection.

To initiate a call in the IBM Lotus Notes client, select the desired IBM Lotus Notes contact in the IBM Lotus Notes address book. Then click on **Dial** in the toolbar of the IBM Lotus Notes client.

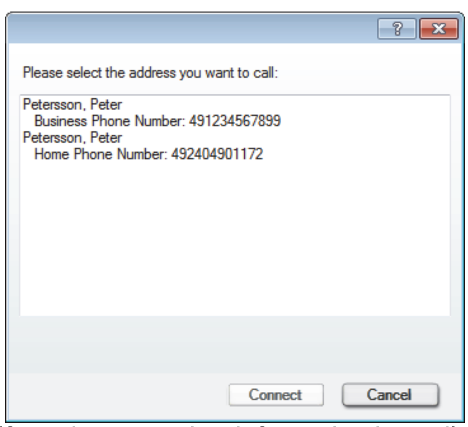
As soon as you have initiated the call, the main window of OpenScape Desktop Client appears in the foreground. In there you can control the connection in the **Call Control** frame as usual.

3.16 Microsoft Outlook Integration

If Microsoft Outlook 2003/2007/2010 is already present on your PC when you install the OpenScape Desktop Client, the Microsoft Outlook toolbar contains the **Dial** button.

If the OpenScape Desktop Client is integrated in your Microsoft Outlook client, you can initiate a call from the following Microsoft Outlook elements:

- Your Microsoft Outlook contact list
  If you have selected a contact entry in your Microsoft Outlook contact list and click the **Dial** button, Microsoft Outlook evaluates the current object (name, phone number, e-mail address etc.) and determines the associated phone number based on the Microsoft Outlook contacts. The phone number is transferred to the OpenScape Desktop Client that uses it as destination number and sets up a connection.
  If several phone numbers are available for the current Microsoft Outlook contact, for example business phone, private and mobile phone, the following dialog in which you must select one of them opens.



  If no phone number information is available, the connection setup fails.

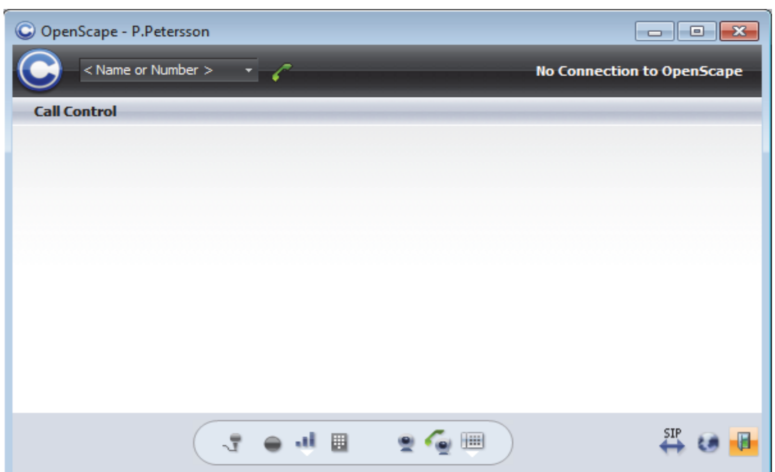
- Your Microsoft Outlook inbox
  If you select an e-mail and click the **Dial** button, the Microsoft Outlook client searches the Microsoft Outlook address books (your private Microsoft Outlook contact list and, for example, the corporate directory) for the originator's name. The phone numbers that can be associated to the originator are transferred to the OpenScape Desktop Client.
  If several phone numbers have been stored for the selected contact, proceedings are the same as outlined above.
  If no phone number information is available for the selected e-mail originator, the connection setup fails.

> ***NOTICE:*** This dialog appears even if you have selected a sent e-mail with several addressees. Select the desired contact from this dialog.

3.17 Operation in Local Mode

If the OpenScape UC Application server fails, the OpenScape Desktop Client Enterprise Web Embedded Edition switches automatically to local mode. You can then use only a restricted number of the server's softphone functions and no OpenScape UC Application-specific features such as presence, conferencing, controlling the preferred device.

During operation in local mode the main window may look as follows:



The main menu does not contain any further controls except the **Pearl** menu (without function here), the **<Name or Number>** field for entering a phone number to be dialed and the icon for dialing the phone number. Its right-hand section displays the message **No Connection to OpenScape** .

A local **Call Control Page** opens in the workspace of the main window for you to reach the following functions depending on the connection status:

- Terminate an initiated/active call

- / Accept/reject incoming call
- Set active call to on-hold
- Retrieve held call
- Make a consultation call
- Toggling
- Connect consultation call subscriber with waiting subscriber.

If the main window is minimized or placed in the background, push the hotkey defined in the program's settings dialog. The main window opens again or appears in the foreground. The cursor is automatically positioned in the **<Name or Number>** input field. If you have selected a phone number in another application in addition, this number appears in the **<Name or Number>** input field and the program dials it automatically.

NOTICE: You define the desired hotkey in the settings dialog on the **Advanced** tab under **General > General**.

When the OpenScape UC Application is available again, the OpenScape Desktop Client returns automatically to the normal operation mode. You can use the full range of OpenScape UC Application features again.

4 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.

4.1 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:

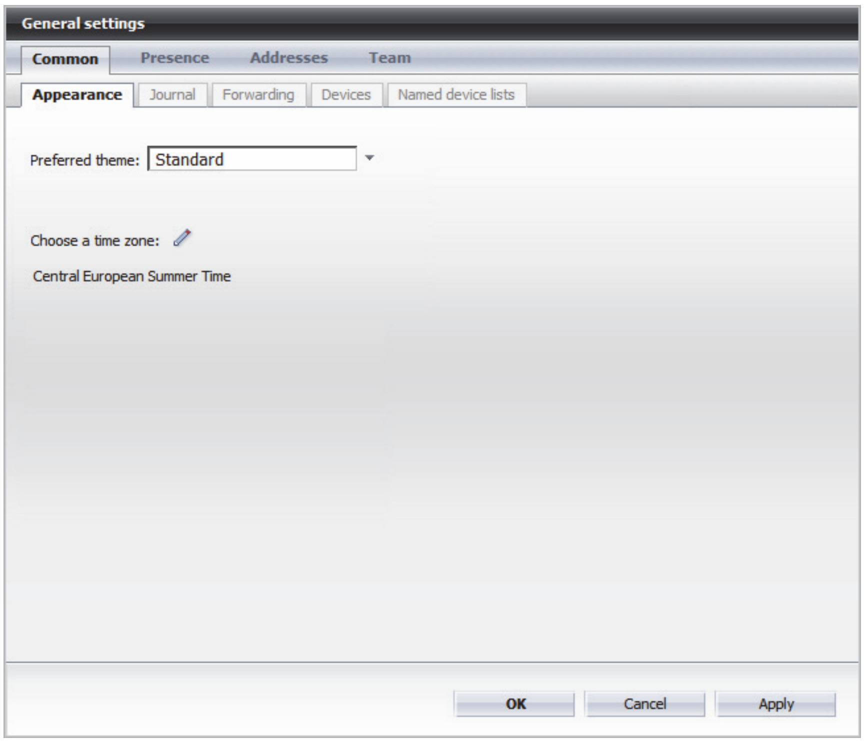
- **Appearance**
  On this tab you set the theme you prefer for the user interface. In addition, you can select the mobile time zone to be currently used.
- **Journal**
  On this tab you perform the settings for logging calls and for the missed-call notifications.
- **Forwarding**
  On this tab you perform 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.

4.1.1 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.

- **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 Desktop 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

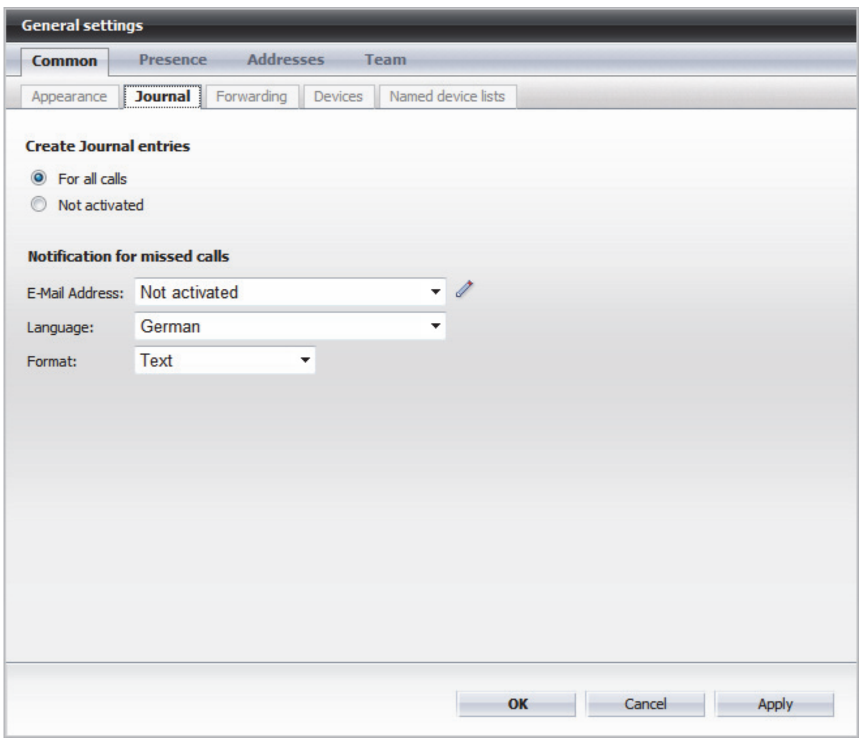
contacts in your contact list see your **current time** when they hover the mousepointer on your presence status symbol. In this case this is the local time you have previously set as **mobile time zone**.

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.

4.1.2 Journal

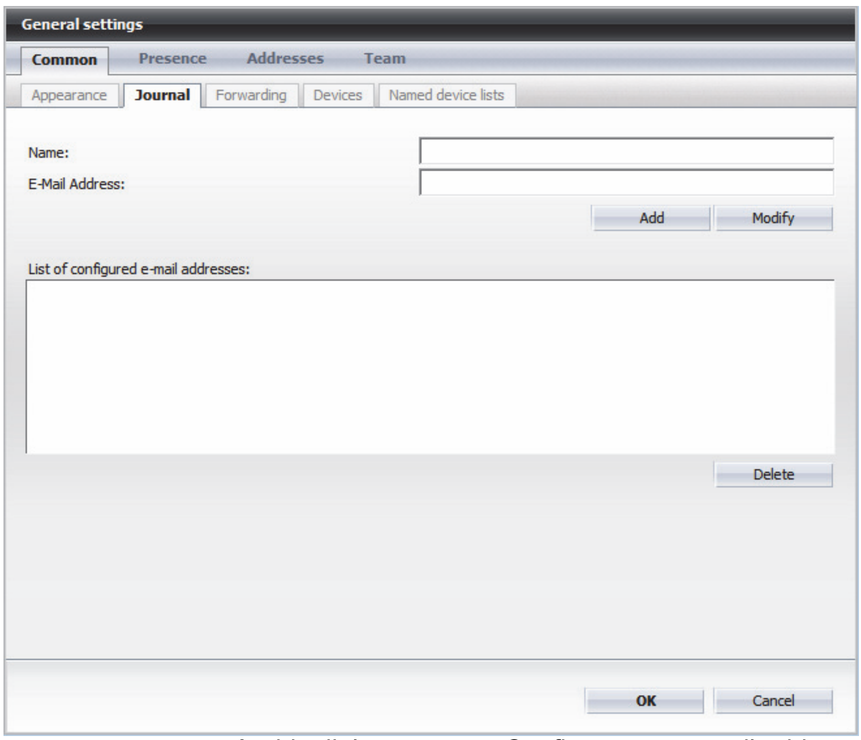
On the **Journal** tab you perform the settings for creating the journal entries and for the notification feature. You reach this setting dialog via **menu > General ... > Common tab > Journal tab**.



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:



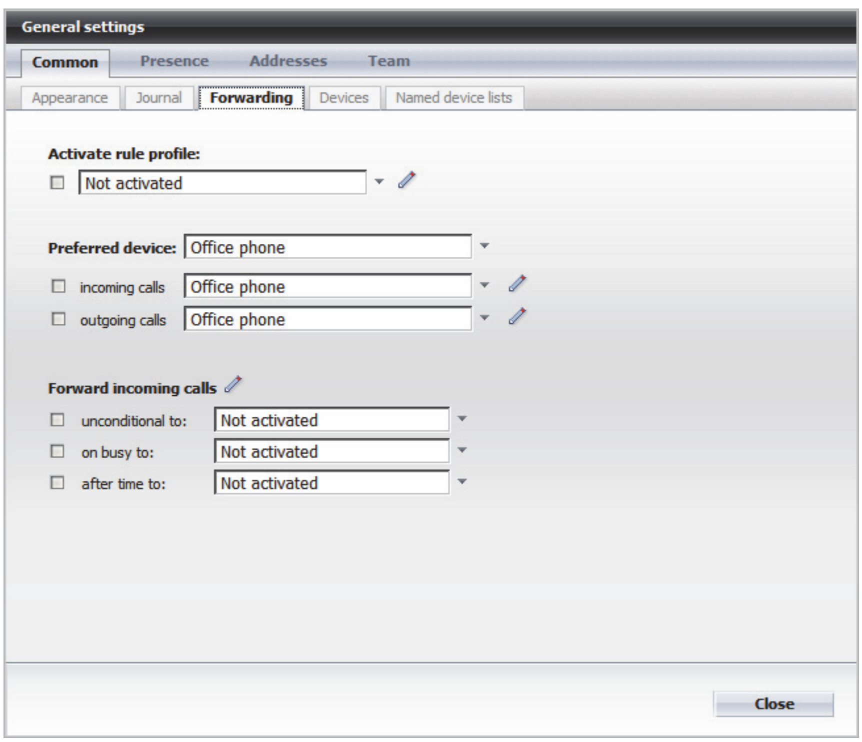
    In this dialog you can: Configure new e-mail addresses via the **Add** button, edit e-mail addresses via the **Modify** button, or remove them from the **List of configured e-mail addresses** via the **Delete** button.
  - **Language**
    Use this combo box to select the notification language.
  - **Format**
    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.

4.1.3 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

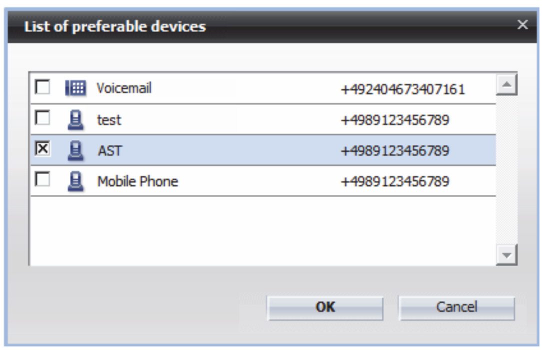
If you want to configure the call forwarding according to a rule profile you have defined, select the corresponding rule profile via the combo box. To edit rule profiles (adding, modifying or deleting), you can click on ✎ to open the **Rules** dialog.

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

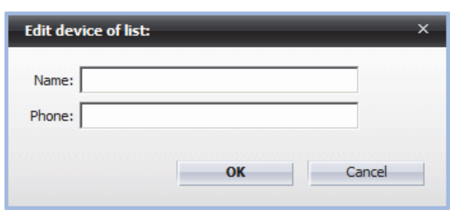
Use this combo box to select the device you prefer for the *One-Number Service* if this device is to be indicated on the caller side with incoming as well as outgoing calls.

- **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.

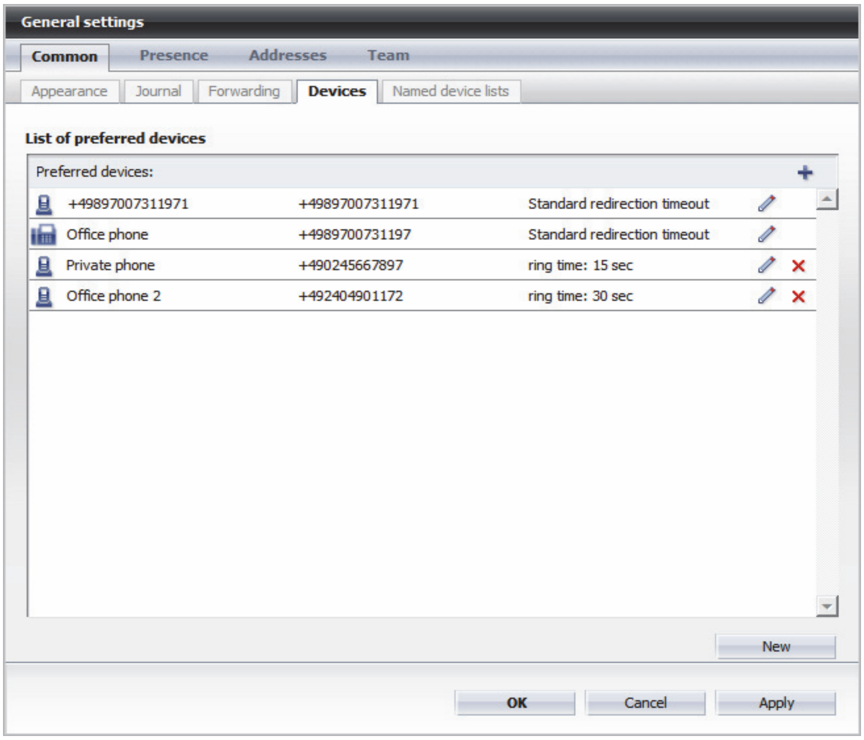
  NOTICE: This feature is only available for specific PBXs.

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

4.1.4 Devices

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

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



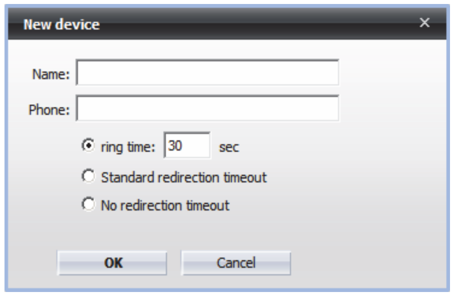
On this tab you can add further devices to be used, modify device settings and delete devices no longer required from the device list. You can then select the single devices in the main menu via the **device display** combo box.

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.

In this dialog you can perform the following settings:

– **Name**
Enter here an expressive name for the device. Under this name the device is displayed in the list and in the selection fields.

– **Telephone**
Enter here the new device's phone number.
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`.

– **ring time: <number>sec.**
This is the individually configurable ring time in seconds after which the ring tone is automatically switched to the next configured device. The default value for this setting is 30 seconds.

– **Standard redirection timeout**
This is a ring time configured by the system administrator in the CMP (*default waiting period Ring-No-Answer (RNA)*) after which the ring tone is automatically switched 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.

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.

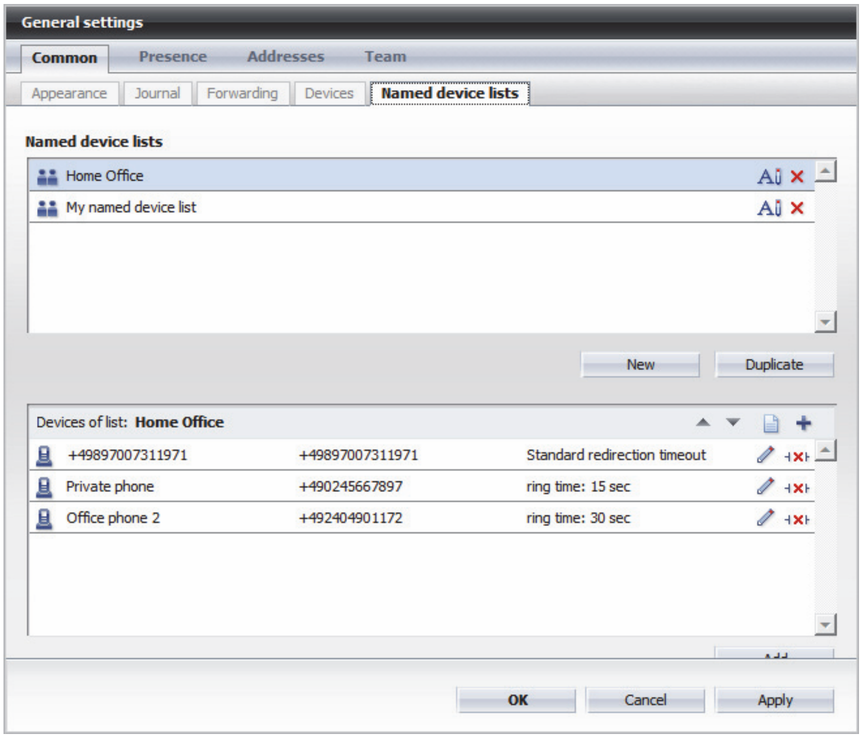
IMPORTANT: The *One-Number Service* (by default the topmost entry in the list) and the device currently used cannot be deleted.

4.1.5 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 priority lists of phone numbers 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 ring time that is configured.

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.

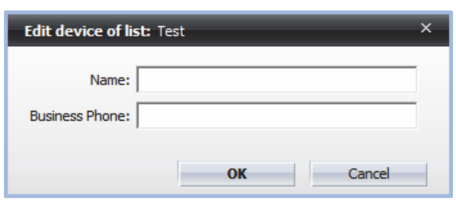
> ***NOTICE:*** You can also click the name of the named device list directly to rename it.

- - 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.
- - Create new phone number
  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.

4.2 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.

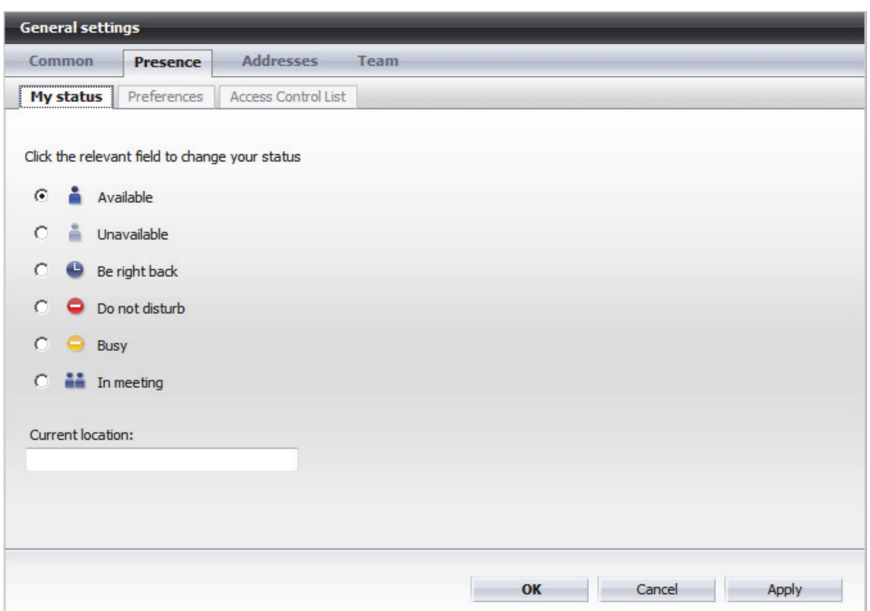
You reach this dialog via **menu > General... > Presence tab**.

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.

4.2.1 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.

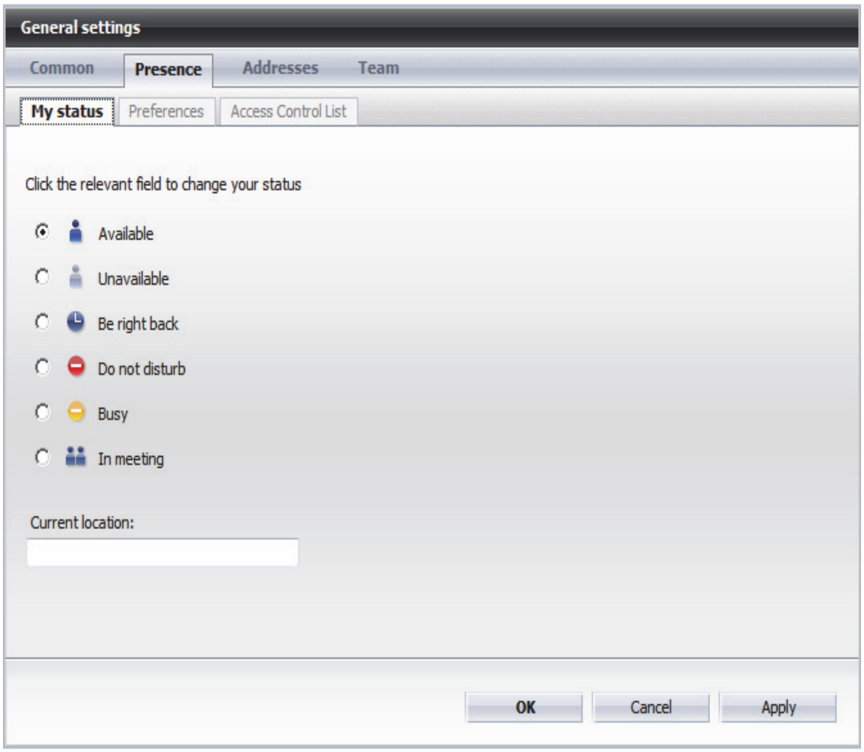
In the **Current location** field you can specify your current location as text entry. This text is also displayed as quick info.

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.

4.2.2 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:

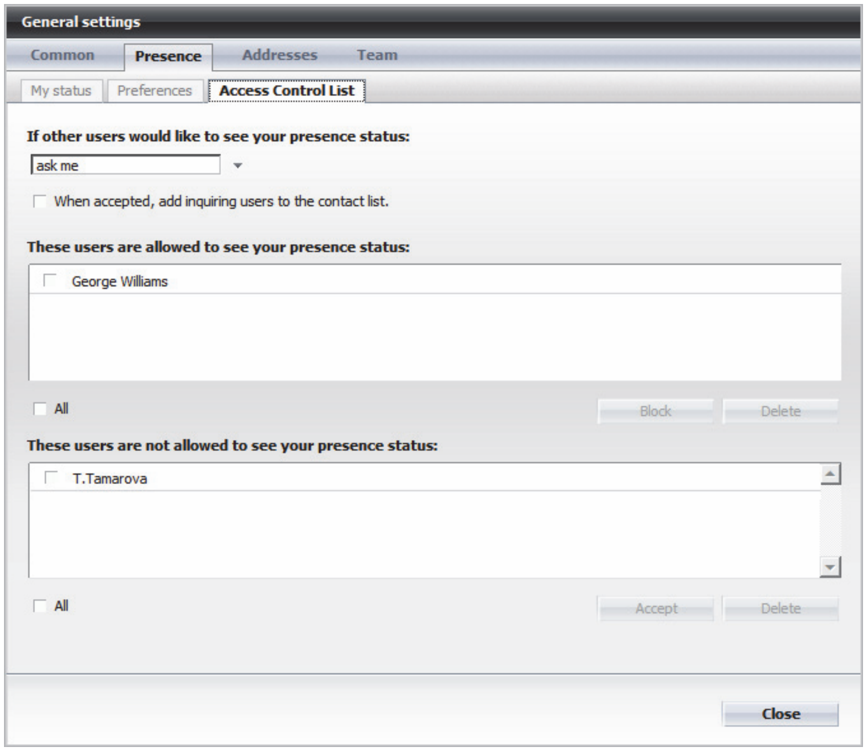
- Click on the **Apply** button to save your settings without closing the **General Settings** dialog.
- Click on **OK** to save your settings and to close the **General Settings** dialog.
- Click on the **Cancel** button to close the **General Settings** dialog without saving the settings already performed.

4.2.3 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:

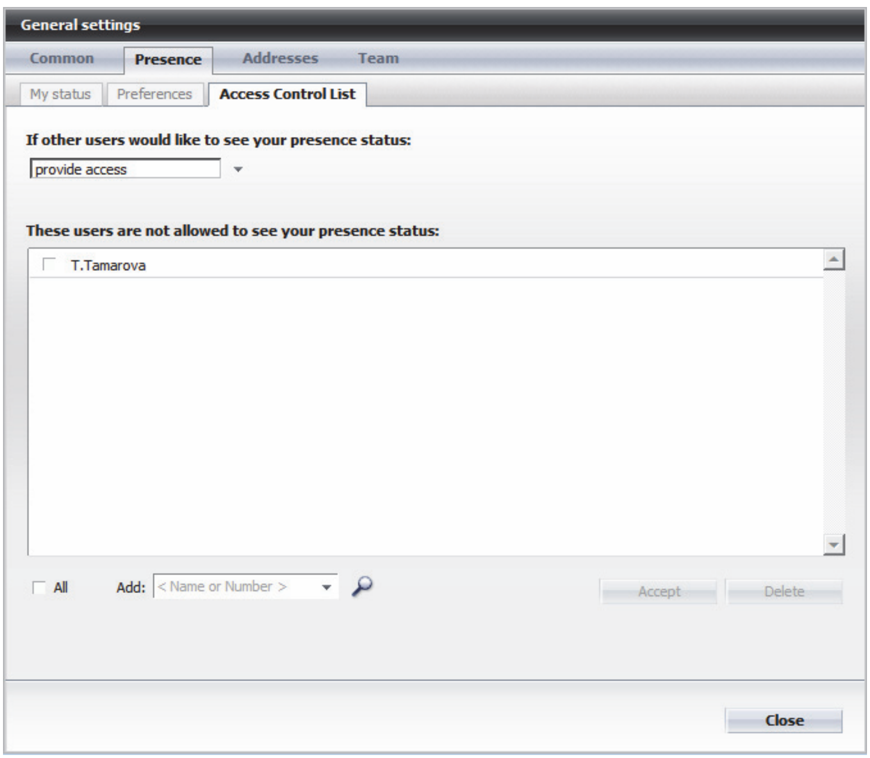


  – **When accepted, add inquiring users to the contact list.**
    If OpenScape UC Application users who send you a presence request that you accept are to be integrated in your private contact list automatically, tick this check box.

  – **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.

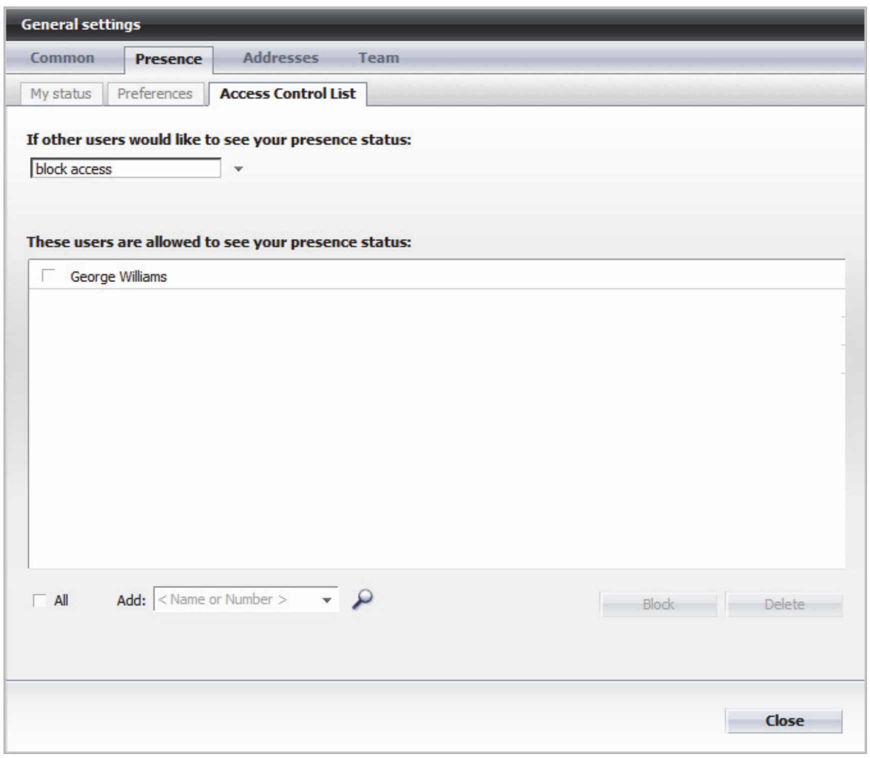
• **provide access**
This option determines that all requesting users are automatically allowed to view your presence status. The **Access Control List** tab may look like this:



- **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.

4.3 Addresses

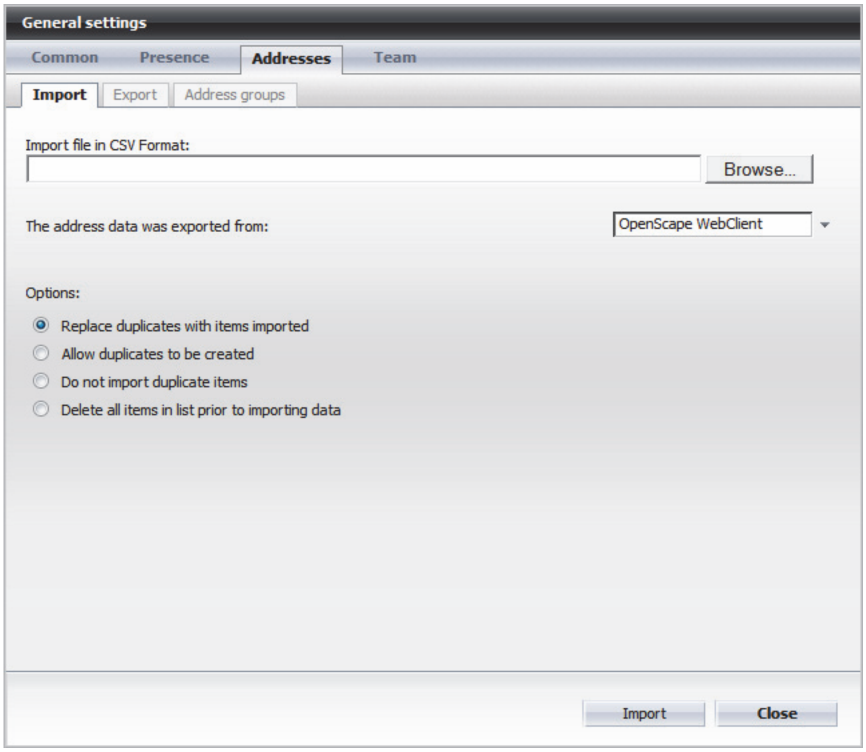
The **Addresses** tab serves for administering your address data. You reach this dialog via **main menu > menu > General ... > Addresses tab**.

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.

4.3.1 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.

4.3.1.1 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:

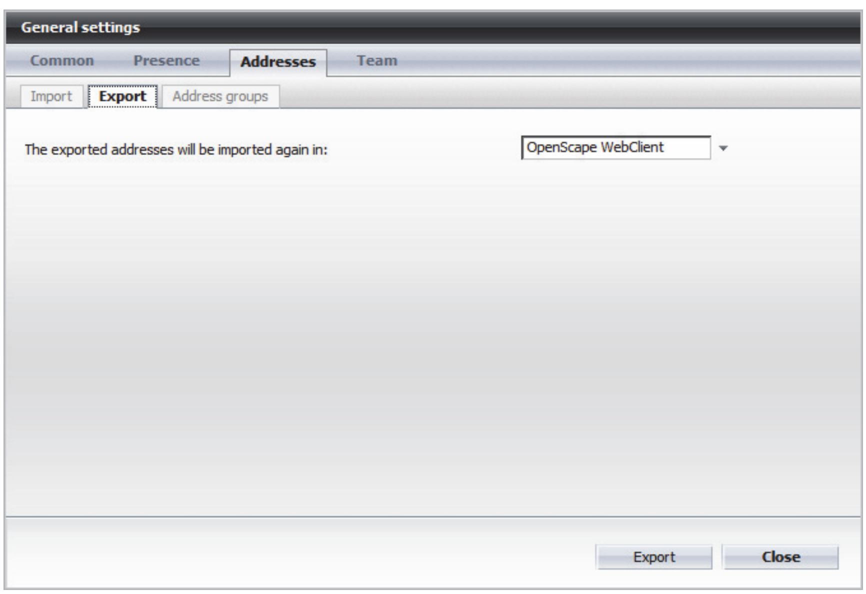
- Export from IBM Lotus Notes:
  - For the file export from IBM Lotus Notes select the Structured Plain Text format.
  - Select the **All documents** export option to export all contacts.
- Import to IBM Lotus Notes:
  - Select Structured Text as import format.

    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”.

4.3.2 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**.



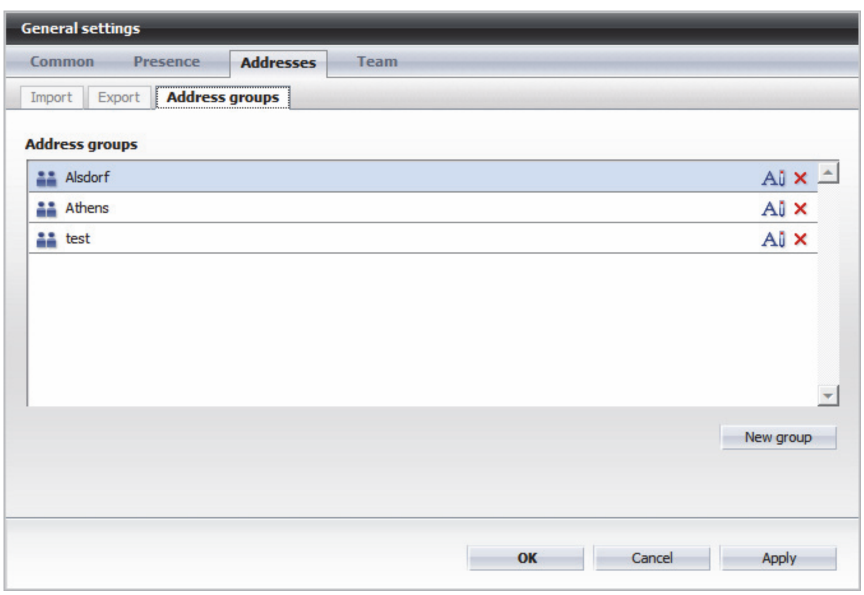
The following options are available in this dialog:

- **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.

4.3.3 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.

4.4 Team

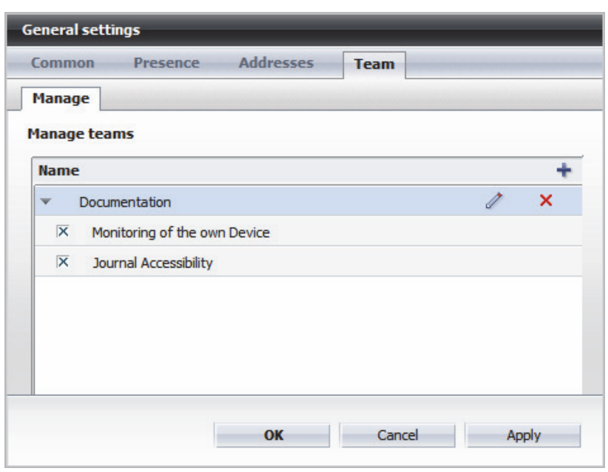
The **Team** tab features the **Manage** tab. It allows team administrators to manage teams and team members to determine which privileges shall be assigned to other team partners.

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.

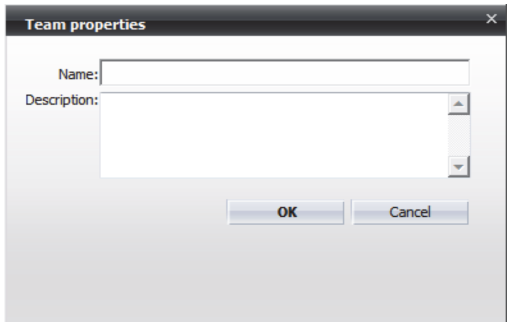


As team administrator you can access the following features:

- 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.

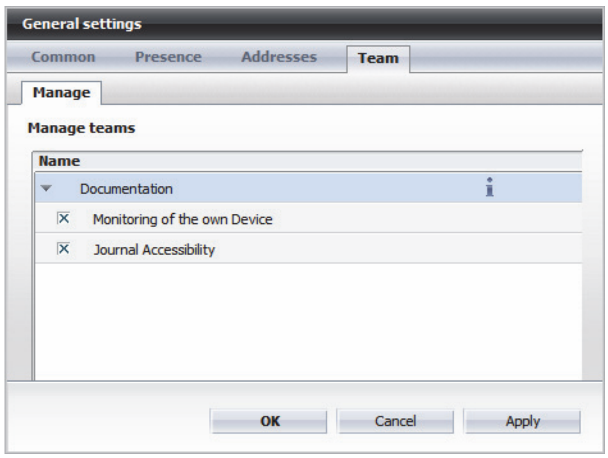
- × Delete team

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.

5 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 via one telephone number. You can create, edit, and delete access to your communication devices to initiate and receive voice communication messages. Configurable devices can include your cell phone, home phone, office phone, and softphone (computer telephony feature).

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

OpenScape Desktop Client processes the different presence states. If you change your presence status, the device that you have selected for incoming and outgoing calls changes according to your specifications in the customizable OpenScape Desktop Client routing lists. If you do not select a device for a presence status, incoming calls go to your voicemail system automatically.

5.1 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.

5.1.1 How to Configure the One-Number Service

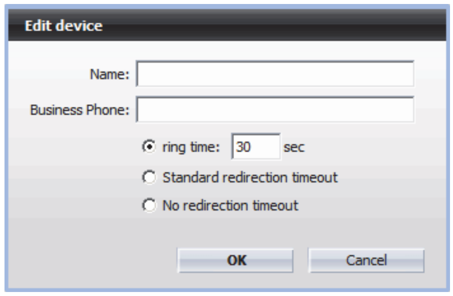
Using the *One-Number Service* feature requires the following settings:

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*.

5.2 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 .

5.3 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.

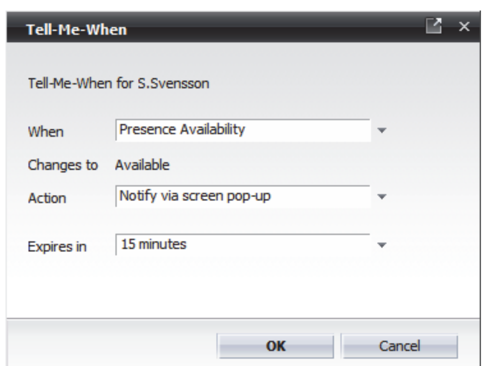
You can reach this notification feature via the **More functions** option in the toolbar of the **Contacts** function window.

> ***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**.

5.3.1 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.

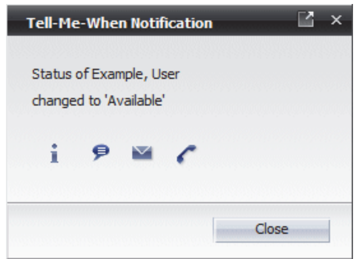
- You use the **Action** combo box to determine the action to be performed when the voice or presence availability changes. You also determine the type of notification to be used to inform you about these changes. The following options are provided in this combo box:
  - **Notify via screen pop-up**
    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.

5.3.1.1 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:

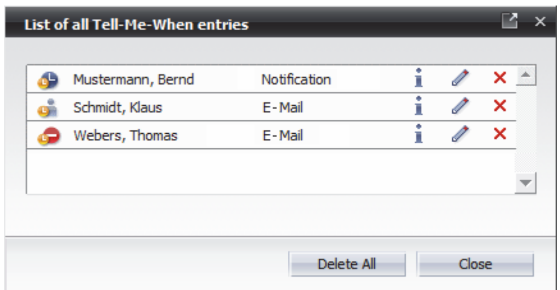
- Lookup Person
  A click on this icon opens the Lookup Person window, which contains information related to the selected contact.
- Start a chat with the displayed contact
  A click on this icon opens the Instant Messaging window. You can enter an instant message and sent it to the contact.
- Send an 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.

5.3.2 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.

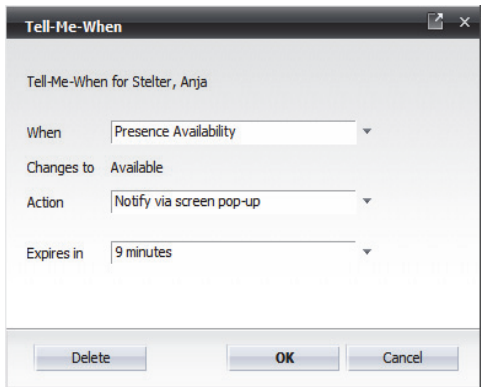
Furthermore, this dialog provides the following two buttons:

- **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.

5.3.3 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.

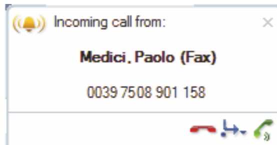
Furthermore, you can use the **Delete** button to deactivate the *Tell-Me-When* feature for the selected contact.

5.4 Notifier Toasts

Notifier toasts inform the OpenScape UC Application user about an incoming instant message or show an incoming call. They always appear in the bottom right area of the desktop.

Incoming call

The notifier toast depicted here is displayed upon the first ring initiated by the incoming call and until the call is accepted or the caller hangs up.



The notifier toast displays the name and/or number of the calling party if this information is available. It otherwise contains the indication that such details are unknown. The notifier toast will stick and stay if you hover the cursor over it.

This type of notifier toast provides you with the following features:

- **Accept call**
  If your preferred device is on your desktop, you can either pick up the handset to answer the incoming call or click the icon to activate the speaker.
  If you have a softphone, click the icon to use the headset.

  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 desktop notification. You can accept the call only via the currently configured preferred device.

- **Forward call/Handover to**
  – **Forward Call**
  Use this option to forward the incoming call to another device or another contact. To do this, enter the name or the phone number of the relevant person in the corresponding input field in the displayed **Forwarding call** dialog. After pushing the return key (**OK**), the **Call Control** window closes. The call is accepted by the specified person. The call control features have been transferred to this person.
  – **Handover to**
  With a click on this option you can select the device for accepting the call. The call is redirected. You keep control over the connection/the call control.

- **Reject call**
  Click on this icon to cancel the connection setup. The **Call Control** window is closed.

Receiving a new instant message (instant-messaging chat)

Another type of notifier toast informs the user that he/she has received a new instant message. This notification displays the sender's name and parts of the message body/the entire text. When you click on an area in the notification, the **Instant Messaging** function window opens, the top area of which showing the complete instant-message text.

> ***NOTICE:*** To display this notifier toast even if the OpenScape Desktop Client or the OpenScape Web Client is shut down, the OpenScape Desktop Integration must have been installed and started on the system.
>
> Please obtain more detailed information about the installation, function, and operation of the OpenScape Desktop Integration from the *OpenScape UC Application V7 Client Applications* manual.

6 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.

6.1 General Information

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

6.1.1 How to Start the Program

To start the program proceed as follows:

Step by Step

› Click on **Start** in the Windows task bar and select **OpenScape Desktop Client**.

> ***NOTICE:*** The program always starts under the user profile used last. The dialog for the user login appears right after the program start by default. Depending on the program start settings (the **LIN** field may be hidden, for example), the program starts without any further login actions required. To change the user profile then, you need to push the **shift key** at the program start.

6.1.2 How to Log on to the Program

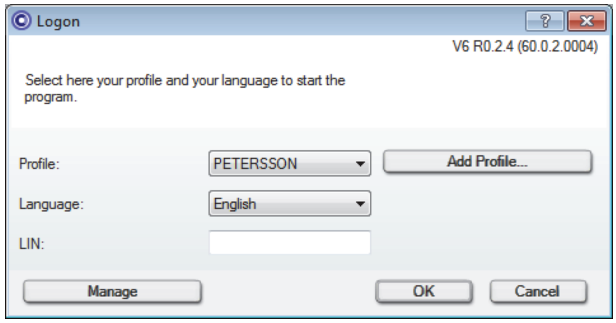
> ***NOTICE:*** The program always opens the **Logon** dialog if a user profile already exists under the current Windows account.

How to log on to the program:

Step by Step

1) Start the OpenScape Desktop Client.

The **Logon** dialog opens.



2) Select the desired profile from the **Profile** combo box.

3) Confirm the default **language** used to display the controls and online help or select another language from the list of available languages.

4) Then click on **OK**.

The Logon dialog closes.

The program is started.

6.1.3 How to Shut the Program Down

The program can be shut down as follows:

Step by Step

1) Rightclick the OpenScape icon in the notification area of the Windows taskbar.

The OpenScape context menu is displayed.

2) Select **Exit OpenScape**.

The main window closes. You are logged off from the program.

6.2 First Steps after the Installation

This section contains information about configuration adjustments to be performed at the initial program start after the setup.

> ***NOTICE:*** You find detailed information about the installation and uninstallation of OpenScape Desktop Client in the manual *OpenScape UC Application V7 OpenScape Desktop Client Enterprise Web Embedded Edition Installation and Administration*.

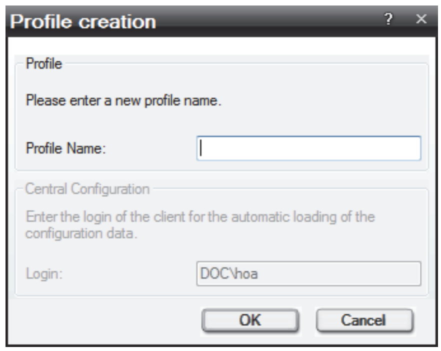
6.2.1 How to Log on to the Program for the first Time

To log on to the program for the first time proceed as follows:

Step by Step

1) Start the program.

The **Profile creation** dialog opens.



2) Enter the name of the new profile in the **Profile Name** field.

3) Click on **OK**.

The **First Login** dialog closes.

The program creates the specified profile and switches automatically to the **Settings** dialog in which you can configure the profile settings.

6.2.2 Initial Configuration

When you perform the initial configuration in the **Settings** dialog you set the user data for connecting the communications system as well as the audio device for signaling connection requests and for conducting calls.

NOTICE: When you log on as user for the first time, you need to configure user-specific program settings, for example to connect to the communications system, in addition to the user-specific login information. You cannot operate the program without these settings.

6.2.2.1 How to Configure an Audio Device

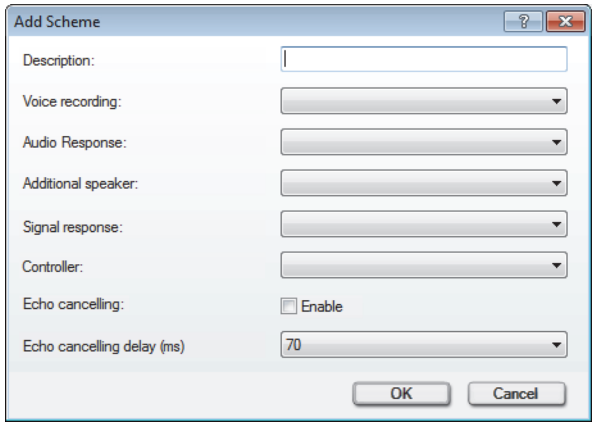
So that you can conduct phone calls, your computer must be equipped with speaker and microphone, for example in the form of a headset. The hardware settings are grouped in audio schemes.

How to configure an audio device:

Step by Step

1) Click on the **Add...** button on the **Audio Schemes** tab of the **Settings** dialog.

The following dialog opens:



2) Specify the **Description** of the audio scheme.

3) Define the audio hardware for the following features:

- **Voice recording**
  Microphone for voice recording
- **Audio Response**
  Primary playback speaker
- **Additional speaker**
  Speaker for the *"open listening*" feature. If an additional speaker has been selected here and this audio scheme is active, the softphone menu displays the icon for the *"open listening"* feature.
- **Signal response**
  Speaker for the signal output (ringing).
- **Controller**
  Select the hardware you use. If this hardware is not contained in the selection list, then use **Soundcard**.

4) Activate the **Echo cancelling** option.

5) Select the value suitable for your system under **Echo cancelling delay (ms)**.

6) Click on **OK**.

The **Add Scheme** dialog closes.

The new audio scheme is the top entry in the list of configured audio schemes on the **Audio Schemes** tab. This sets it automatically as the currently used hardware for audio connections.

6.2.2.2 How to Configure the HiPath Connection

Prerequisites

- When installing the program you selected the **HiPath Provider** as default provider.

How to configure the **HiPath Provider** module, thus the Softphone functionality of OpenScape Desktop Client:

Step by Step

1) Start the OpenScape Desktop Client.

The Logon dialog opens.

2) Click on the **Manage** button.

A selection menu opens.

3) Select the **Settings** menu option.

The **Settings** dialog opens.

4) Switch to the **Advanced** tab.

5) Under **HiPath Provider > Device** you select your **Phone type** and your **Key module type** if required.

6) Under **HiPath Provider > Main connection** set the following parameters:

- **Type**: <Select your PBX here.>
- **Gatekeeper**: <Enter here the IP address of the communications system's gatekeeper.>
- **Extension number**: <Enter here the number under which you can be reached on the connected communications system.>
- **Password**: <Specify here the password configured for your extension number.>
- **Own IP address**: <Select the **Detect automatically** option.>

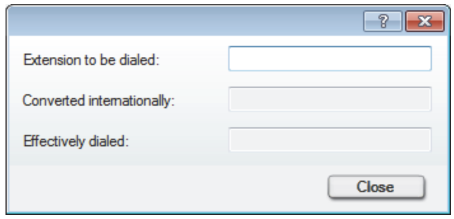
7) Under **HiPath Provider > Main network access** determine the following parameters:

- **Country code**: <Enter here the international prefix for your site, for example `49` for Germany.>
- **Area code**: <Enter here the area code of your location without leading zero.>
- **System identification number**: <Enter here the system identification number.>
- **Trunk code:** <Enter the code configured on your system for allocating outbound trunks, for example 0.>
- **Prefix for long distance calls:** <Enter here the network operator code for long distance calls, for example 0.>

- **Prefix for international calls**: <Enter the network operator code for international calls, for example `00`.>

8) Click the **Test** button to check your entries.

The following dialog opens.



9) Enter the **Extension to be dialed**. Based on the parameters set for the **Main network access**, the OpenScape Desktop Client automatically determines the phone number in the international number format in the **Converted internationally** field.

10) When the test has confirmed your entries for the main network access parameter as correct, click on the **Close** button.

The test dialog closes.

You have configured the OpenScape Desktop Client as your softphone with connection to a HiPath communications system.

6.2.2.3 How to Configure the SIP Connection

Prerequisites

- When installing the program you selected the SIP Provider as default provider.

How to configure the **SIP Service Provider** module, thus the softphone functionality of OpenScape Desktop Client:

Step by Step

1) Switch to the **Advanced** tab in the **Settings** dialog.

2) Under **SIP Service Provider > Main line** enter the following parameters:

- **User**: <Enter your phone number here>
- **Display**: <Enter your name here>
- **Tooltip text**: <Enter something like `SIP Phone` optionally>
- **ID**: <Enter your phone number or e-mail address.>
- **Password**: <Enter here the password provided by your system administrator.>

3) Under **SIP Service Provider > Registrar** set the following parameters:

- **Server**: <Enter here the IP address provided by your system administrator>

- You determine the port for the server connection in the **Connection** section. Your system administrator will provide further information.

4) Under **SIP Service Provider > Proxy** set the following parameters:

- **Server**: <Enter here the IP address provided by your system administrator>
- You determine the port for the server connection in the **Connection** section. Your system administrator will provide further information.

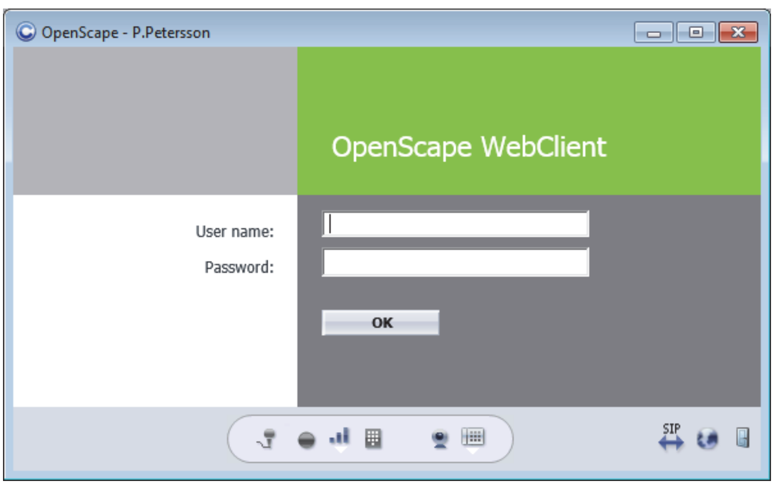
5) Under **SIP Service Provider > Network access** enter the network access data provided by your system administrator.

> ***NOTICE:*** Make sure that the **Normalize call numbers** option has been set under **SIP Service Provider > Address conversion**. The network access data is otherwise not required.

You have configured the OpenScape Desktop Client as your SIP softphone.

6.2.3 How to Log on to the OpenScape UC Application System for the first Time

The following dialog opens at the initial program start.



> ***NOTICE:*** This dialog is also displayed when you have quit the system via the main menu **menu > Logout**.

You use this dialog to log on to the OpenScape UC Application system with the integrated OpenScape Web Client. After you have successfully logged in at the system you can use the OpenScape UC Application features.

> ***NOTICE:*** If *the Single Sign-on* feature has been configured for your Windows user account, the above dialog is not displayed. *Single Sign-on* enables you to use the features of the OpenScape UC Application via the OpenScape Desktop Client after logging in at your workstation without having to additionally authenticate against the OpenScape UC Application system. You find continuative information about *Single Sign-on* in the administrator documentation OpenScape UC Application.

> ***NOTICE:*** If *the Single Sign-on* feature has been configured for your Windows user account, the above dialog is not displayed. *Single Sign-on* enables you to use the features of the OpenScape UC Application via the OpenScape Desktop Client after logging in at your workstation without having to additionally authenticate against the OpenScape UC Application system. You find continuative information about *Single Sign-on* in the administrator documentation OpenScape UC Application.

Step by Step

1) Enter your **User name**.

2) If required, select your domain via the **Domain** combo box.

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

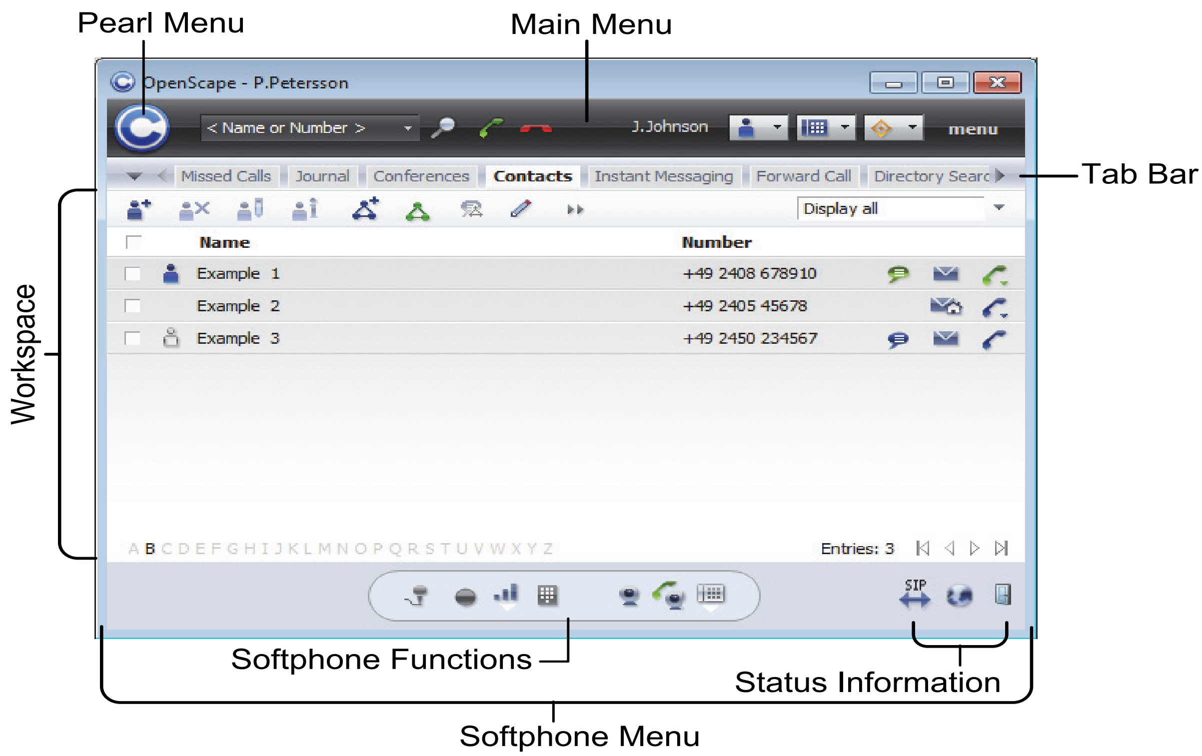
3) Enter your user password in the **Password** field.

4) Click on **OK** or push the **return key** (Enter).

The user interface of the integrated OpenScape Web Client opens.

6.3 Overview of the User Interface

After you have successfully logged in at the system, the main window opens by default. It features the following elements:

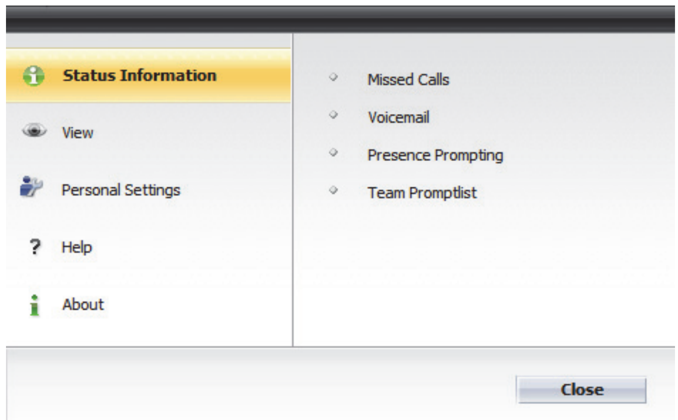


Main menu

You find the program's main menu at the top margin of the main window. It enables quick program operation.

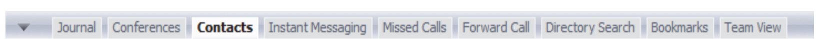
Pearl menu

This is an application menu icon for accessing the program's basic features.



Tab bar

Under the main menu you find a bar that displays the single function windows of the workspace as tabs.



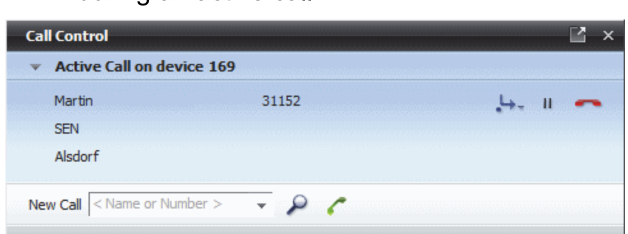
With a click on the tabs you can toggle the following function windows:

- **Missed Calls**
- **Journal**
- **Voicemail Box**
- **Conferences**
- **Contacts**
- **Instant Messaging**
- **Forward Call**
- **Directory Search**
- **Bookmarks**
- **Team View**

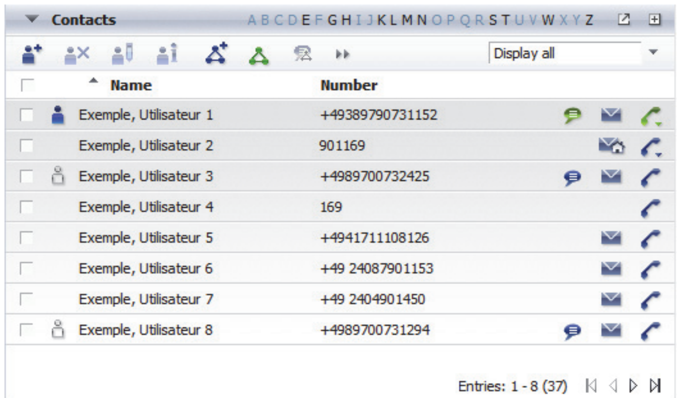
Workspace

The workspace offers access to the features of the different function windows:

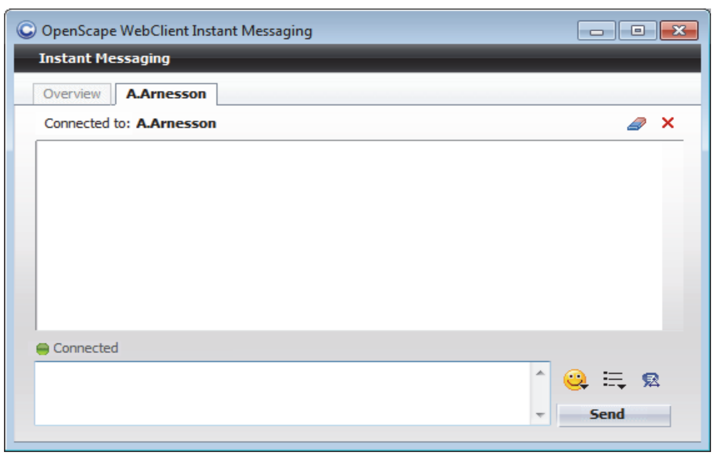
- **Call Control**
  The **Call Control** function window lets you look for and call a contact, shows information about in- and outbound calls and provides telephony features during an active call.



- **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 call single contacts directly, edit and remove existing contact data as well as send e-mails and instant messages from the contact list.

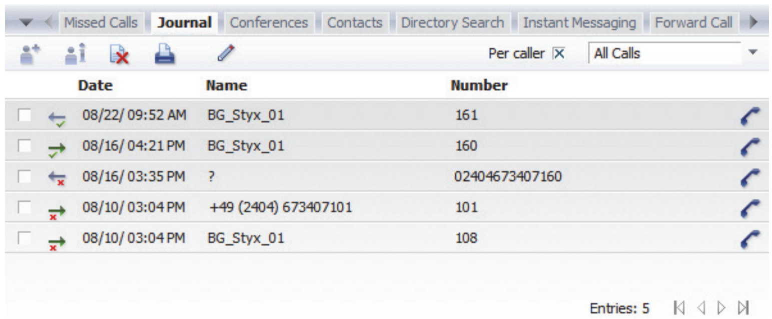


- **Instant Messaging**
  The **Instant Messaging** function window enables sending and receiving instant messages. It also provides an overview of the active chat connections as well as the option to log off from/log on to the Instant-Messaging service.

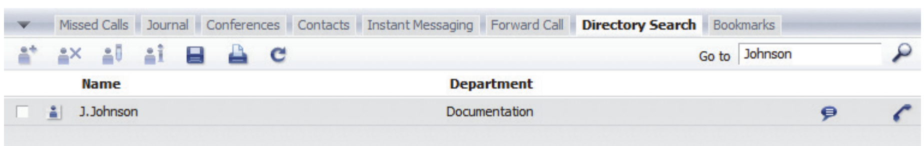


- **Conferences**
  The **Conferences** function window provides the controls for creating a new conference or for starting a configured conference. If you have a configured web conference connection, you can select whether this connection is to be started at a conference also.

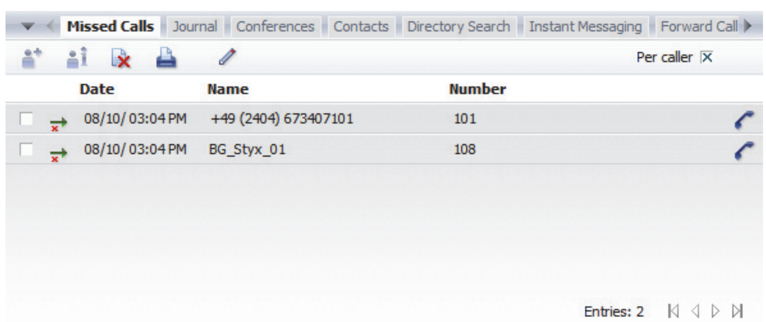
- **Journal**
  No matter whether you are logged on or off, the OpenScape UC Application server logs all in- and outbound calls in the **Journal** function window. Furthermore, you can initiate connections to logged communication partners from the **Journal**.



- **Directory Search**
  The program supports integrating several directories. You can search these directories for specific contacts and get in touch with such contacts directly by e-mail or phone as well as integrate them in your private contact list.

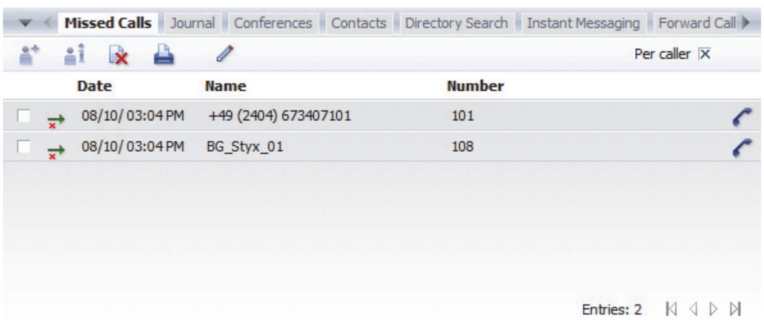


- **Missed Calls**
  The **Missed Calls** function window enables fast access to all missed calls.

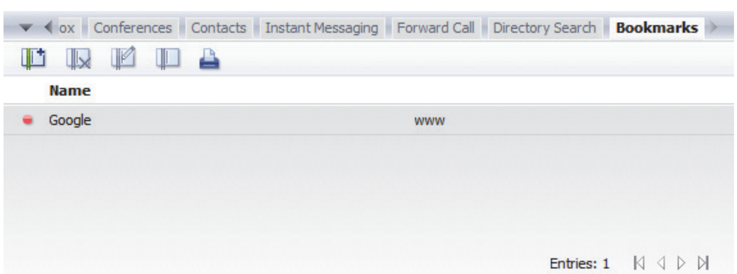


- **Voicemail Box**
  The **Voicemail Box** function window enables fast access to received voice-mails and provides controls for playing them.

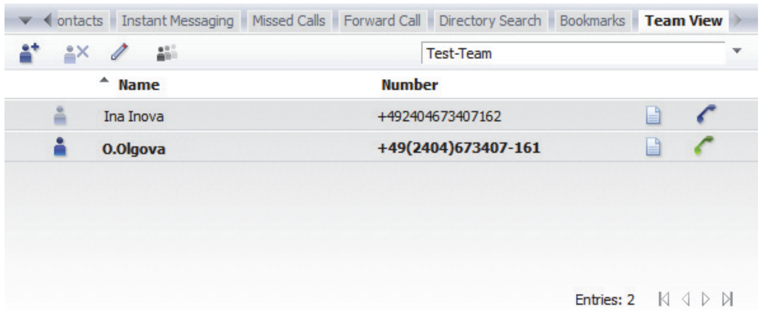
- **Forward Call**
  The **Forwarding Call** function window enables diverting incoming calls from the office phone to other configured devices.



- **Bookmarks**
  The **Bookmarks** function window enables configuring new bookmarks or displaying internet pages via bookmarks already defined.

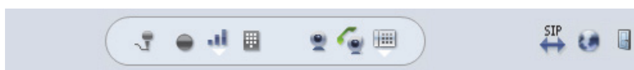


- **Team View**
  The **Team View** function window shows the member list of the respectively selected team and provides useful features for telephoning in the team. This function window remains empty until you are added to a team as member or have created a team.



Softphone menu

You find the softphone menu at the bottom margin of the main window.



It provides various softphone functions, enables controlling the volume and shows the status of the connection to the communications system and to the OpenScape UC Application server.

6.3.1 How to Open a Function Window

You reach the workspace function windows via the tab bar, which is displayed in the main window under the main menu.

Step by Step

› Click on the desired tab in the tab bar.

The selected function window appears in the workspace of the main window.

NOTICE: If you cannot see your desired tab, click on ◀ or ▶ in the tab bar under the main menu.

6.4 Settings-related Actions

You can perform the following individual settings for each user:

6.4.1 How to Create a new Profile

You can change the user profile only while performing the default logon to the program. Proceed as follows:

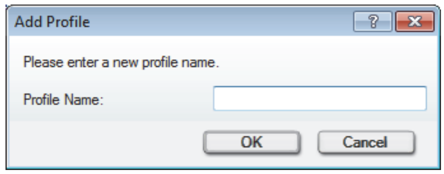
Step by Step

1) Start the OpenScape Desktop Client.

   The **Logon** dialog opens.

2) Click on the **Add Profile...** button.

   The **Add Profile** dialog opens.



3) Enter a **Profile Name**.

4) Confirm your entries with **OK**.

   The **Add Profile** dialog closes.

You have successfully created the new user profile.

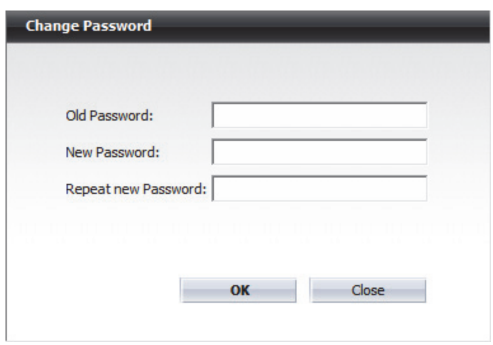
6.4.2 How to Change your Password

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.

6.4.3 How to Change the Language

The language in which the controls and the online help of the program are represented is specified during the default login. How to change the language:

Step by Step

1) Shut the OpenScape Desktop Client down.

2) Reboot the OpenScape Desktop Client.

3) Select the **Language** you want to set from the language list in the Logon dialog.

4) Then click on **OK**.

The Logon dialog closes. The language change has been saved and the program starts.

The currently configured language is used for representing the user interface and the online help.

6.4.4 How to Set your own Presence Status

How to set your current presence status:

Step by Step

1) Click on the combo box of the **Presence display**  in the main menu.

2) Select the desired presence status from the presence status list.

6.4.5 How to Add an Audio Scheme

> ***NOTICE:*** You can configure a new audio scheme in the **Settings** dialog while logging on to the program as well as during operation.

How to add an audio scheme to the program configuration:

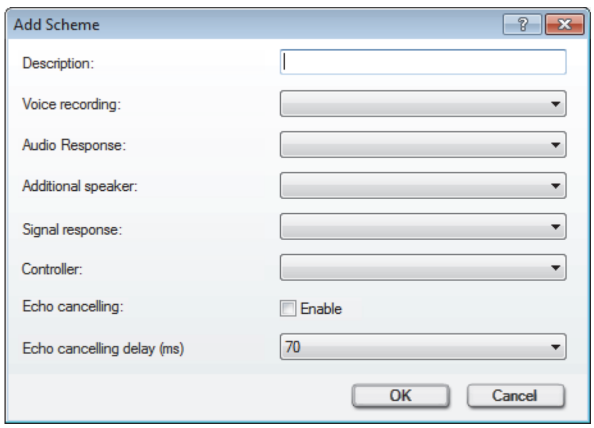
Step by Step

1) Click on the **Manage** button in the **Logon** dialog and select **Settings**.

The **Settings** dialog opens. The **Audio Schemes** tab is displayed by default.

2) Click on the **Add** button.

The **Add Scheme** dialog opens.



3) Assign a name to the new audio scheme in the **Description** field.

4) In the **Voice recording** combo box select the audio hardware of the user computer to be used by OpenScape Desktop Client for voice recording.

5) In the **Audio Response** combo box select the audio hardware of the user computer to be used by OpenScape Desktop Client for voice playback.

6) In the **Additional speaker** combo box select an additional speaker for voice output if required. If an additional speaker has been selected here and this audio scheme is active, the Softphone menu of the **Call Control** as well as the Softphone toolbar of the **Video** window display the icon for the *open listening* feature.

> ***NOTICE:*** The hardware for the **additional speaker** must be different from the **audio response** hardware.

7) In the **Signal response** combo box select the audio hardware of the user computer to be used by OpenScape Desktop Client for ringtone output.

8) Select the audio hardware of the user computer to be used for controlling special hardware in the **Controller** field.

9) Activate the **Echo cancelling** option.

10) Select the value suitable for your system under **Echo cancelling delay (ms)**.

11) Confirm the settings of the new audio scheme with **OK**.

The **Add Scheme** dialog closes.

The newly defined audio scheme appears as first entry in the list of the configured audio schemes on the **Audio Schemes** tab.

6.4.6 How to Change an Audio Scheme

You can change the configuration of an already configured and/or currently used audio scheme during login or operation. You are thus always able to select the hardware that matches the respective situation.

How to change the configuration of an already defined audio scheme during login:

Step by Step

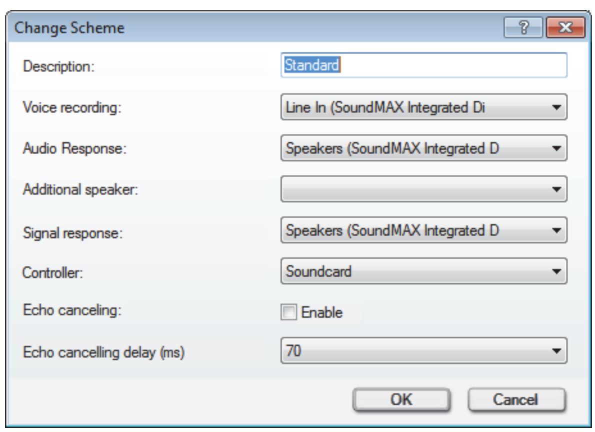
1) Click on the **Manage** button in the **Logon** dialog and select **Settings**.

The **Settings** dialog opens. The **Audio Schemes** tab is displayed by default.

2) Select the audio scheme the settings of which you want to change.

3) Click on the **Change...** button.

The **Change Scheme** dialog with the current configuration of the selected audio scheme opens.



4) Perform the desired modifications.

NOTICE: The settings you can change in this dialog are identical with the settings of a new audio scheme.

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5) Confirm the changes with **OK**.

The **Change Scheme** dialog closes. Your settings are saved.

6.4.7 How to React to Automatic Audio Device Detection

Under certain circumstances, OpenScape Desktop Client can detect new audio devices as soon as you connect them to the computer.

When OpenScape Desktop Client is operating and you connect your computer with an audio device for which Windows has the required drivers, the OpenScape Desktop Client Softphone menu displays the **New Audio Device** icon.

How to configure a new audio scheme for the automatically detected device and add it subsequently:

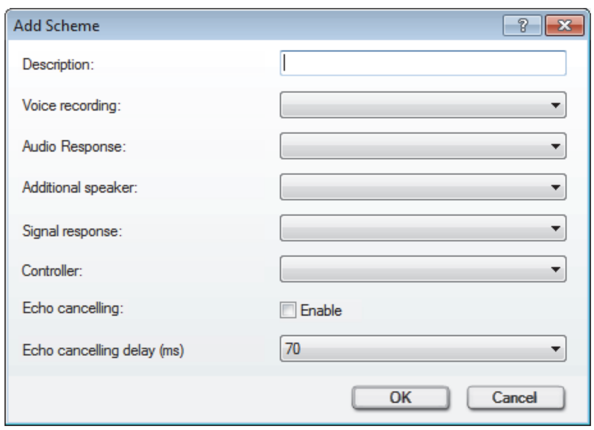
Step by Step

1) Click on the freshly displayed icon.

A message appears, informing you that a new audio device has been detected.

2) Click on **Yes** in this message.

The **Add Scheme** dialog opens.



3) Assign a name to the new audio scheme in the **Description** field.

4) In the **Voice recording** combo box select the audio hardware of the user computer to be used by OpenScape Desktop Client for voice recording.

5) In the **Audio Response** combo box select the audio hardware of the user computer to be used by OpenScape Desktop Client for voice playback.

6) In the **Additional speaker** combo box select an additional speaker for voice output if required. If an additional speaker has been selected here and this audio scheme is active, the Softphone menu of the **Call Control** as well as the Softphone toolbar of the **Video** window display the icon for the *open listening* feature.

> ***NOTICE:*** The hardware for the **additional speaker** must be different from the **audio response** hardware.

7) In the **Signal response** combo box select the audio hardware of the user computer to be used by OpenScape Desktop Client for ringtone output.

8) Select the audio hardware of the user computer to be used for controlling special hardware in the **Controller** field.

9) Activate the **Echo cancelling** option.

10) Select the value suitable for your system under **Echo cancelling delay (ms)**.

11) Confirm the settings of the new audio scheme with **OK**.

You have now added and configured a new audio scheme for the automatically detected audio device. The **Add Scheme** dialog closes. The newly defined audio scheme appears as first entry in the list of the configured audio schemes on the **Audio Schemes** tab.

6.4.8 How to Add a Video Scheme

Prerequisites

- You operate the OpenScape Desktop Client at an SIP communications system.
- The **SIP Service Provider** module is active.

> ***NOTICE:*** You can configure a new video scheme only in the **Settings** dialog while logging on to the program.

How to add a new video scheme to the OpenScape Desktop Client configuration:

Step by Step

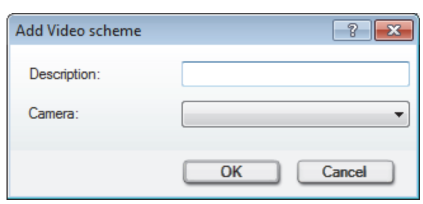
1) Click on the **Manage** button in the **Logon** dialog and select **Settings**.

The **Settings** dialog opens. The **Audio Schemes** tab is displayed by default.

2) Switch to the tab **Advanced > SIP Service Provider > Video schemes**.

3) Click on the **Add** button.

The **Add Video scheme** dialog opens.



4) Assign a name to the new video scheme in the **Description** field.

5) In the **Camera** combo box select the video hardware of the user computer to be used by OpenScape Desktop Client for sending video signals.

6) Confirm your settings with **OK**.

The **Add Video scheme** dialog closes. The new video scheme appears on the **Advanced** tab in the list of configured video schemes.

7) Perform the settings for your **default video configuration**:

a) Select the default view for your video screen under **Layout**.

b) Select the setting for the camera preview (own video image) under **Preview**.

c) Activate or disable the **Mirrored** option to determine whether or not your own image shall be displayed mirrored in the **Video** screen.

Configuring the video scheme and the default video configuration is now complete.

6.4.9 How to Edit a Video Scheme

Prerequisites

- You operate the OpenScape Desktop Client at an SIP communications system.
- The **SIP Service Provider** module is active.

> ***NOTICE:*** You can change the configuration of an audio scheme only in the **Settings** dialog while logging on to the program.

How to change the configuration of a video scheme:

Step by Step

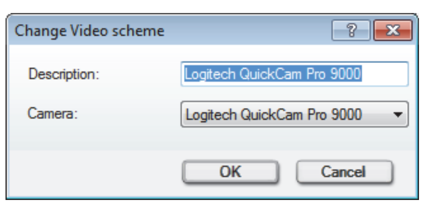
1) Click on the **Manage** button in the **Logon** dialog and select **Settings**.

The **Settings** dialog opens. The **Audio Schemes** tab is displayed by default.

2) Switch to the tab **Advanced > SIP Service Provider > Video schemes**.

3) Click on the **Change...** button.

The **Change Video scheme** dialog opens



4) Perform the desired modifications.

5) Confirm your settings with **OK**.

The **Change Video scheme** dialog closes. Your modifications are saved.

6) Perform changes to the **default video configuration** if required.

6.4.10 How to React to Automatic Video Device Detection

Under certain circumstances, OpenScape Desktop Client can detect new video devices as soon as you connect them to the computer.

When OpenScape Desktop Client is operating and you connect your computer with a video device for which Windows has the required drivers, the OpenScape Desktop Client Softphone menu displays the **New Video Device** icon.

How to configure a new video scheme for the automatically detected device and add it subsequently:

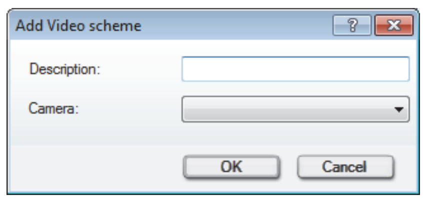
Step by Step

1) Click on the freshly displayed icon.

A message appears, informing you that a new video device has been detected.

2) Click on **Yes** in this message.

The **Add Video scheme** dialog opens.



3) Assign a name to the new video scheme in the **Description** field.

4) In the **Camera** combo box select the video hardware of the user computer to be used by OpenScape Desktop Client for sending video signals.

5) Confirm your settings with **OK**.

The **Add Video scheme** dialog closes. The new video scheme appears on the **Advanced** tab under **SIP Service Provider > Video schemes** in the list of configured video schemes.

6) Perform the settings for your **default video configuration** there:

a) Select the default view for your video screen under **Layout**.

b) Select the setting for the camera preview (own video image) under **Preview**.

c) Activate or disable the **Mirrored** option to determine whether or not your own image shall be displayed mirrored in the **Video** screen.

You have now added and configured a new video scheme for the automatically detected video device and completed the default video configuration.

6.4.11 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.

6.4.11.1 How to Allow Presence Monitoring

How to allow the display of your presence status in the contact list of other users:

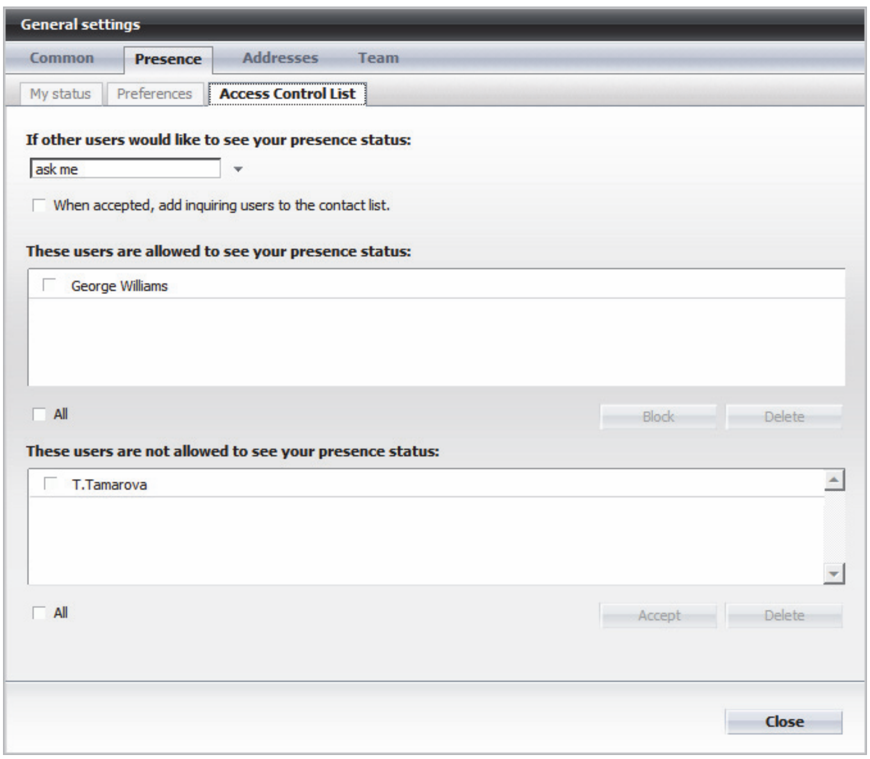
Step by Step

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.

6.4.11.2 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.

6.4.12 How to Set your Preferred Device

How to set your preferred device for inbound or outbound calls:

Step by Step

1) Click on the combo box of the **device display** in the main menu.

2) Select the desired device from the device list.

You can use the configured device for inbound and outbound calls from now on.

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.

6.4.13 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.

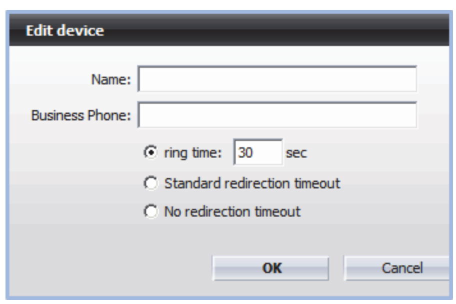
The **General settings** dialog opens.

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** in the main menu.

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

6.4.14 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) Open the **Forward Call** function window by selecting the **Forward Call** tab in the tab bar under the main menu.
2) Depending on whether or not the calling person is to be informed about the call forwarding, continue with one of the following actions:
   - In the **Forward calls to** combo box you select the desired device from your device list. Your incoming calls are forwarded to the device you have just set. The caller then sees the address of the forwarding target.
   - 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*.

The call forwarding has been configured and is active.

6.4.15 How to Disable a Call Forwarding

How to disable an active call forwarding:

Step by Step

1) Open the **Forward Call** function window.
2) Depending on the active forwarding option, select **Not activated** in the combo box **Forward calls to** or **Preferred device**.

The performed settings become immediately active. Call forwarding is now disabled.

6.4.16 How to Configure an individual Ring Tone

> ***NOTICE:*** You can edit the settings for the individual ring tone via the **Settings** dialog during the program start or during live operation. For this purpose, click on the **Manage** button in the Logon dialog and select in the **Settings** dialog on the tab **Advanced > HiPath Provider > Ring tones**. Alternatively, right-click the OpenScape icon in the notification area of the Windows taskbar and select under **Personal Settings > Ring tones**.

How to select an individual ring tone for signaling incoming connection requests at an HiPath communications system while operating OpenScape Desktop Client:

Step by Step

1) Rightclick the OpenScape icon in the notification area of the Windows taskbar.

The OpenScape context menu opens.

2) Select the **Personal Settings > Ring tones** option.

The **Settings** dialog opens. The **Advanced** tab with the **HiPath Provider > Ring tones** option appears.

3) Activate the **Use individual ring tones** check box.

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

The **Open** window is displayed.

5) In the **Open** window switch to the folder that contains the desired `WAV` or `MP3` file.

6) Select the desired file.

7) Click the **Open** button.

The **Open** dialog is closed.

The selected audio file has been adopted as the ring tone of your OpenScape Desktop Client.

6.4.17 How to Change the Default Ring Tone (HiPath Provider)

> ***NOTICE:*** These settings are only available while the OpenScape Desktop Client is active, you are logged in and no individual ring tone has been configured.

If you operate your OpenScape Desktop Client at a HiPath communications system and use the default ring tones of the system, you can change the pitch in the following way:

Step by Step

1) Open the Pearl menu.
2) Click on the **OpenScape Options** button.

   The **Settings** dialog opens.
3) Switch to the tab **Advanced > HiPath Provider > Operation settings**.
4) Click the **Change Ring Tone** button.

   A dialog is displayed and the current ring tone sounds.
5) Click on **Next Ring Tone** or **Previous Ring Tone** to select the desired ring tone.
6) Click the **Close** button to complete the setting.

The selected setting is immediately active.

6.4.18 How to Set the mobile Time Zone

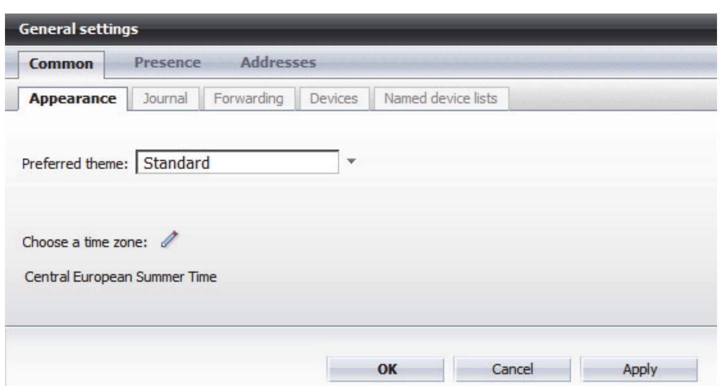
If you are on the road, for example, and in a different time zone, you can configure a mobile time zone. This makes the **Journal** display the arrival of calls in the current local time. Furthermore, your OpenScape UC Application contacts can see the **current time** of your location via the quick-info of your presence icon in your contact list.

How to define your mobile time zone:

Step by Step

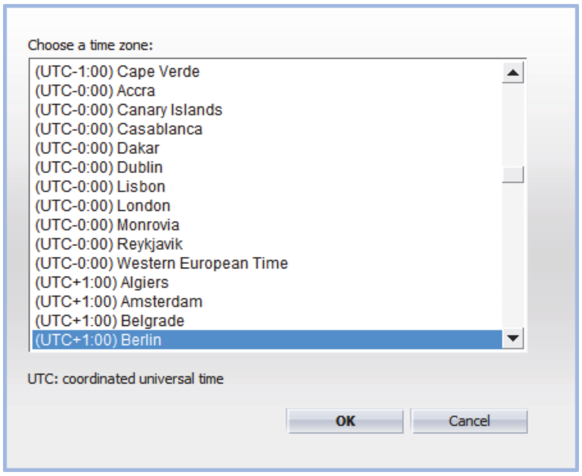
1) Start the program and log on to the system.
2) Select in the main menu **menu > General ... > Common tab > Appearance tab**.

   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.

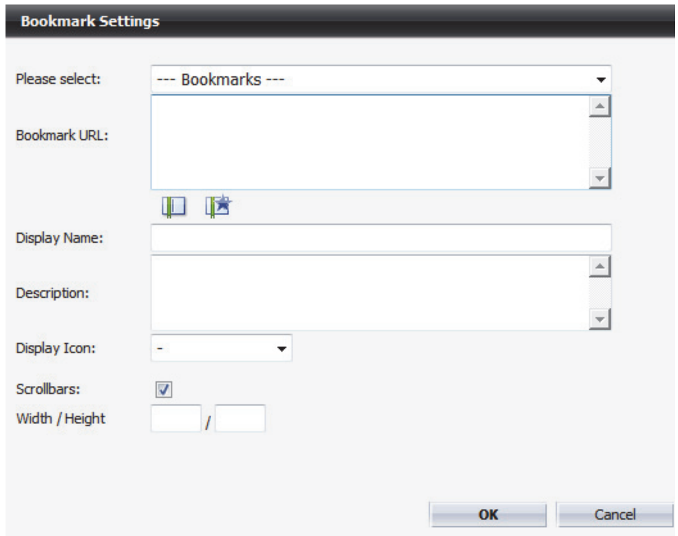
6.4.19 How to Create a new Bookmark

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.

6.5 Contact Management

The following features are available for managing the contacts in your contact list.

6.5.1 How to Create a new Contact

Prerequisites

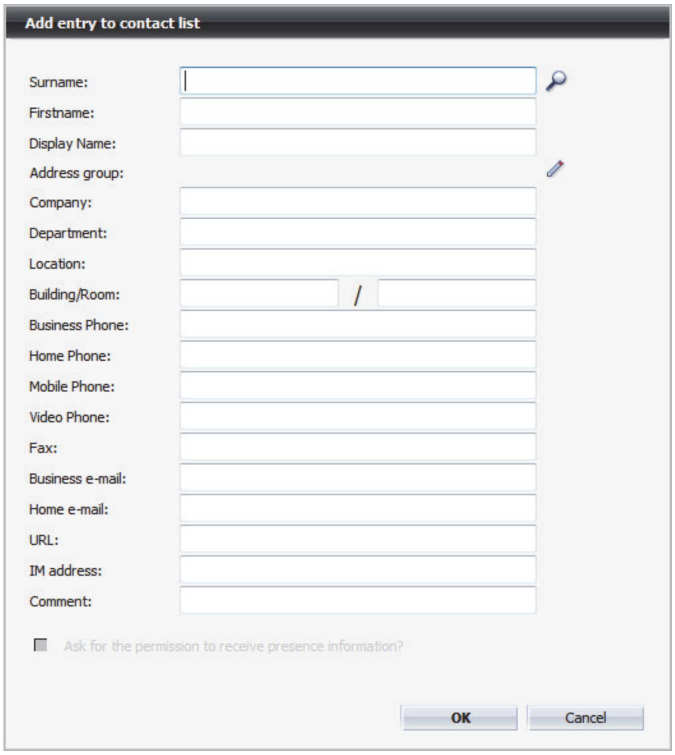
- The program is correctly configured and you are logged in at the communications system.

How to add a new contact to your contact list:

Step by Step

1) Click on in the **Contacts** function window.

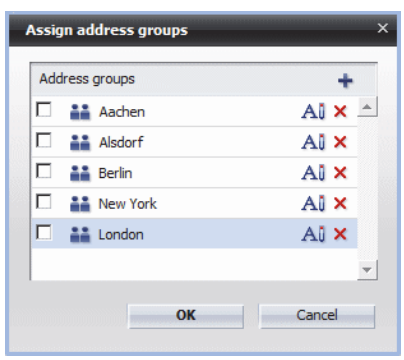
The following dialog opens.



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.

6.5.2 How to Add a Contact from a Directory

Prerequisites

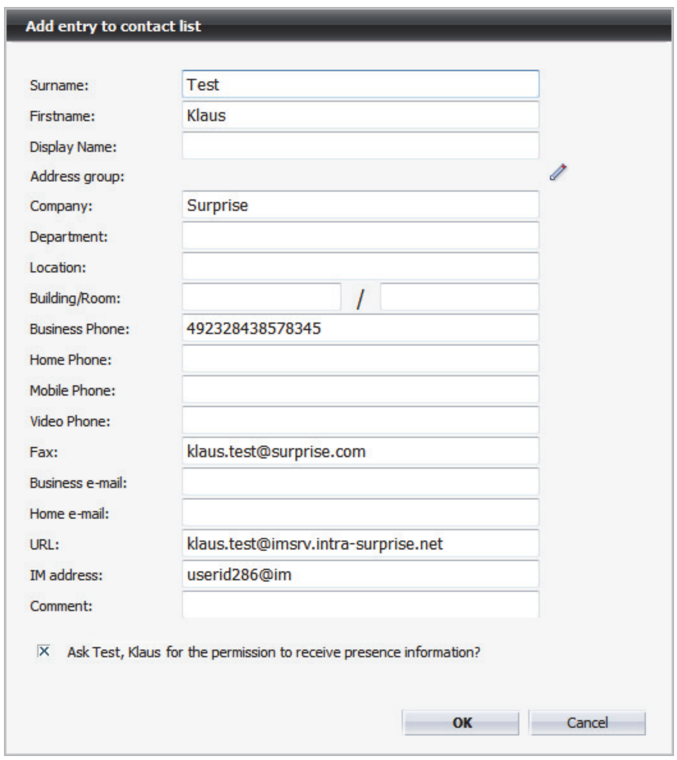
- The program is correctly configured and you are logged in at the communications system.

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.

6.5.3 How to Edit Contact Data

Prerequisites

- The program is correctly configured and you are logged in at the communications system.

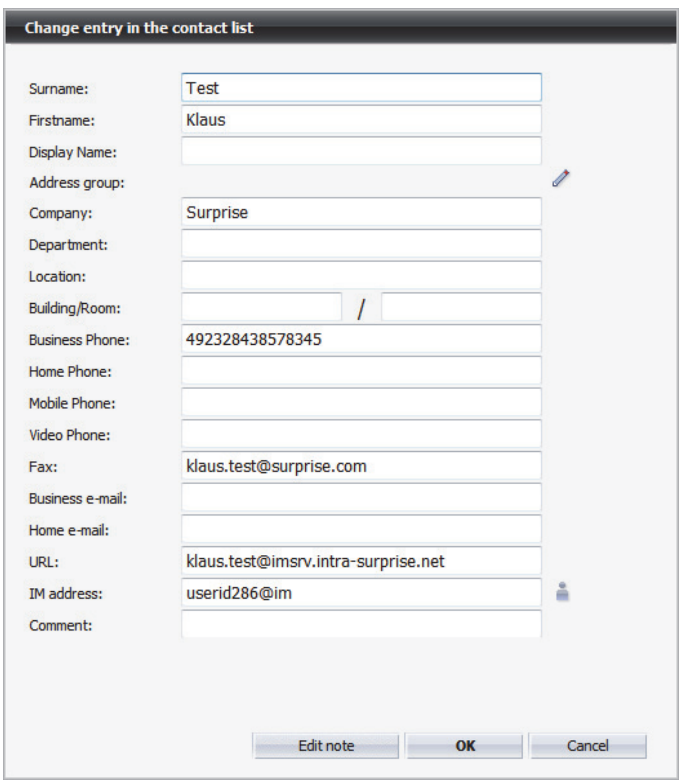
How to edit the contact information of an already configured contact:

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.

6.5.4 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.

6.5.5 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.

6.5.6 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.

6.5.7 How to Edit a Presence Prompt

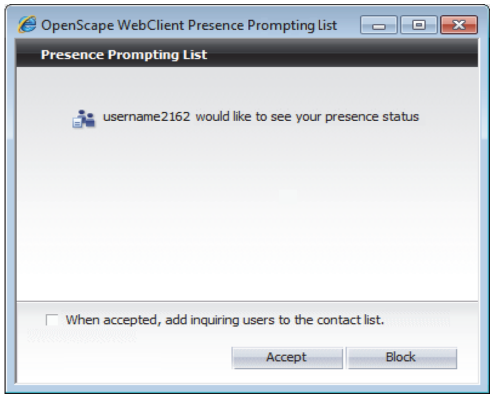
As soon as an OpenScape UC Application user has added you to his/her contact list by directory search, you receive a presence prompt as OpenScape UC Application user. In this dialog you can decide whether or not to allow the prompting user to see your presence information.

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.

6.5.8 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.

6.5.9 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.

6.5.10 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.

6.5.11 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.

6.5.12 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.

6.6 Communicating with your Contacts

The following features are available for communicating with other subscribers:

6.6.1 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.

6.6.2 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.

6.6.3 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.

6.6.4 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.

6.6.5 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.

6.6.6 How to Call a Microsoft Outlook Contact

How to initiate a call from your Microsoft Outlook address book using the Microsoft Outlook integration:

Step by Step

1) Switch to the address book of your Microsoft Outlook client.

2) Select the desired contact and click in the Microsoft Outlook toolbar on the **Dial** icon.

3) If the selected contact includes several phone numbers, a selection dialog opens. In this dialog mark the phone number you wish to use for the call.

4) Then click on the **Connect** button in the selection dialog.

The call is initiated and the selection dialog closed.

6.6.7 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.

6.6.8 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.

6.6.9 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.

6.6.10 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.

6.6.11 How to Activate the "Completion of Calls to Busy Subscriber" (CCBS) Feature

Prerequisites

- The OpenScape Desktop Client Enterprise Web Embedded Edition is connected to an OpenScape Voice V5.

This feature enables you to automate a connection setup to a previously busy subscriber in the PBX. When you initiate a call and receive a busy signal from the target subscriber, you can activate or use the callback feature as follows:

Step by Step

1) In the **Call Control** function window click on .

Thereafter, the connection is cleared. You are then available to other callers again and you can make calls.

If the previously busy target subscriber becomes available again, the program is informed by the PBX accordingly. The program then lets you know by a call in the **Call Control** function window that the target subscriber is no longer busy.

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.

2) Accept the call with a click on in the **Call Control** function window.

The PBX calls the target subscriber again.

NOTICE: CCBS cannot be used if the callee rejects the call or the PBX of the callee does not support the feature.

6.6.12 How to Activate the "Completion of Calls on no Reply" (CCNR) Feature

Prerequisites

- The OpenScape Desktop Client Enterprise Web Embedded Edition is connected to an OpenScape Voice V5.

This feature enables you to automate a connection setup to a subscriber who does not answer the phone in the PBX. If the target subscriber is available but does not answer the phone, you can activate the callback feature as follows:

Step by Step

1) In the **Call Control** function window click on .

When the target subscriber hangs up the next time, the PBX informs the program accordingly. The program then lets you know by a call in the **Call Control** function window that the target subscriber is available.

> ***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.

2) Accept this call with a click on in the **Call Control** function window.

You are connected to the desired subscriber.

> ***NOTICE:*** CCNR cannot be used if the callee rejects the call or the PBX of the callee does not support the feature.

6.6.13 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.

6.6.14 How to Accept a Call within the Call Pickup Group

This section shows you how to accept a call intended for another member from your call pickup group in his/her absence.

Prerequisites

- You and the called subscriber belong to the same call pickup group that has been created in your communications system (for example OpenScape Voice). The call pickup feature has been assigned to all members of the call pickup group.
- A code has been specified on the communications system (for example OpenScape Voice) for the **Call Pickup** feature.
- The same **code** is configured for the **Call Pickup** feature in the **Settings > Advanced > SIP Service Provider > Codes** dialog.

To accept a call for another member of your call pickup group proceed as follows:

> ***NOTICE:*** Incoming calls destined for other members of your call pickup group are not indicated to you in any way in the OpenScape Desktop Client Enterprise Web Embedded Edition.

Step by Step

1) Enter the **Code** for the **Call Pickup** feature in the **<Name or Number>** field of the main menu.

2) Click on to the right of the **<Name or Number>** field.

The **Call Control** opens. You are connected to the caller.

6.6.15 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 .

6.6.16 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.

6.6.17 How to Start a Chat (Instant Messaging)

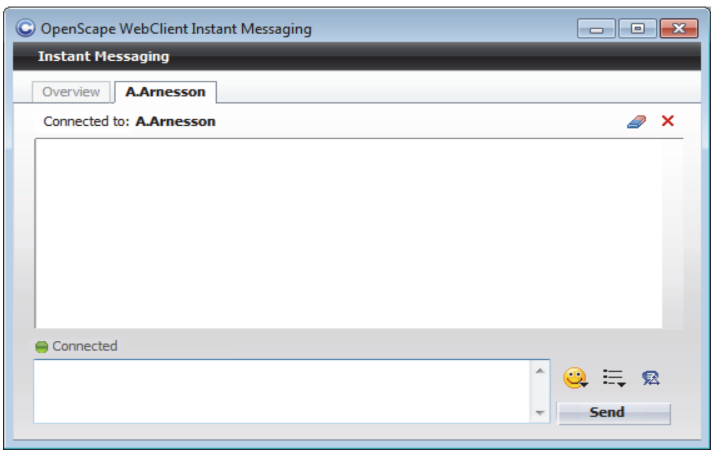
How to start a chat with another OpenScape UC Application user:

Step by Step

1) Open the **Contacts** function window.

2) Click on or in the row of the desired contact.

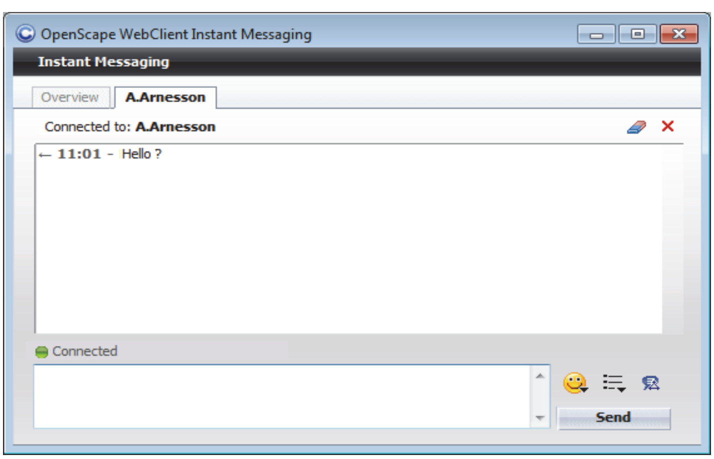
The **Instant Messaging** window opens.



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.

6.6.18 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.

6.6.19 How to Initiate a Video Call (SIP only)

In the following you learn how to initiate a video call to a contact from your private contact list.

Prerequisites

- The OpenScape Desktop Client is connected to an OpenScape Voice V5 or later.
- You and your conversational partner have an installed and operable video camera (webcam).
- In the **SIP Service Provider** settings you have configured and selected a video scheme that uses your operable video camera.
- The settings of the **Default video configuration** apply for the video scheme selected in the dialog **Settings > Advanced > SIP Service Provider > Video schemes**: the **Preview** is enabled (**On**) and **Mirrored**, the Layout is **In call**.
- A video-compatible device has been configured, i.e. a phone number has been specified in the **Video Phone** input field of the contact entry form.

Proceed as follows to initiate a video call:

Step by Step

1) In the main window, on the tab bar under the main menu, click on the **Contacts** tab.

The **Contacts** function window appears in the workspace of the main window.

2) Activate the icon in the Softphone menu of the main window.

3) Select the desired contact from your private contact list.

4) Click on the small triangle of the icon.

All devices configured for the contact are displayed.

5) Click on the phone number indicated with **Video** .

When your conversational partner too has activated the icon, the video call is initiated and listed in the **Call Control**. The **Video** window opens automatically and shows your own image in a red frame and the image of your conversational partner.

NOTICE: If the SIP communications system does not provide a sufficient amount of free bandwidth, no video call can be set up. A message will inform you about this fact.

6.6.20 How to Start Video Streaming

This section describes how to add a video connection to a voice connection.

Prerequisites

- The OpenScape Desktop Client Enterprise Web Embedded Edition is connected to an OpenScape Voice V5 or later.
- You have an installed and operable video camera.
- In the **SIP Service Provider** settings you have configured and selected a video scheme that uses your operable video camera.
- For the video scheme you have selected in the **Settings > Advanced > SIP Service Provider > Video schemes** dialog the **Preview** is disabled (**off**).

How to switch a video connection to an active call:

Step by Step

1) Click in the Softphone menu on .

The **Video** window opens, showing your own image.

2) Click in the Softphone toolbar of the **Video** window on .

Your own image appears in a red frame. It is transmitted to the connection partner.

> ***NOTICE:*** If your connection partner has a video camera too and switched his/her image to the conference in the same way, it appears automatically in your **Video** window. You cannot control or activate/deactivate receiving video images.

6.6.21 How to Stop Video Streaming

How to terminate transmitting your own video image:

Step by Step

› Click in the Softphone toolbar of the **Video** window on .

Your own image does no longer appear in a red frame.

NOTICE: The video image of your connection partner remains visible until he/she terminates the transmission or the connection is cleared.

Your video image is no longer being transmitted. However, it remains visible in the **Video** window until you switch off the video camera via the icon in the Softphone menu of the main window or in the Softphone toolbar of the **Video** window.

6.6.22 How to Play Voicemails via Telephone

Execute the following steps to play your voicemails via telephone:

Step by Step

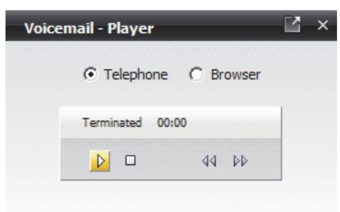
1) Open the **Voicemail Box** function window.

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.

6.6.23 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

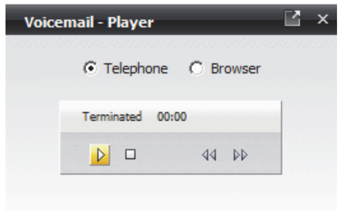
1) Open the **Voicemail Box** function window.

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.

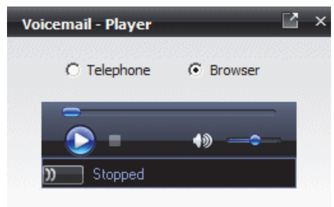
3) Click on the icon.

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.

6.6.24 How to Activate Tell-Me-When

How to configure and activate the *Tell-Me-When* feature for one of your OpenScape UC Application contacts:

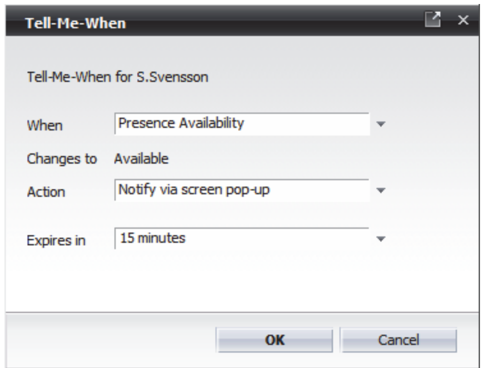
Step by Step

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.

6.6.25 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.

6.6.26 How to Enter DTMF Characters in the DTMF Dialing Keypad by "Copy & Paste"

The Softphone menu allows sending DTMF characters during an active connection (call or conference) via the DTMF dialing keypad. The following is a step-by-step description of how to enter DTMF characters in the DTMF dialing keypad by Copy & Paste.

Step by Step

1) Copy the desired content (for example PIN, phone number, etc.) by simultaneously pushing **[Ctrl] + [C]** to the clipboard.

2) Then click on in the Softphone menu.

The DTMF dialing keypad opens.

3) Paste the copied content via **[Ctrl] + [V]** in the DTMF dialing keyboard.

4) Enable  at the top right margin on the DTMF dialing keypad.

The selected DTMF characters are displayed at the top left margin of the DTMF dialing keypad and sent.

6.7 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.

6.7.1 How to Create a new Team

In this section we describe how you create a new team.

Prerequisites

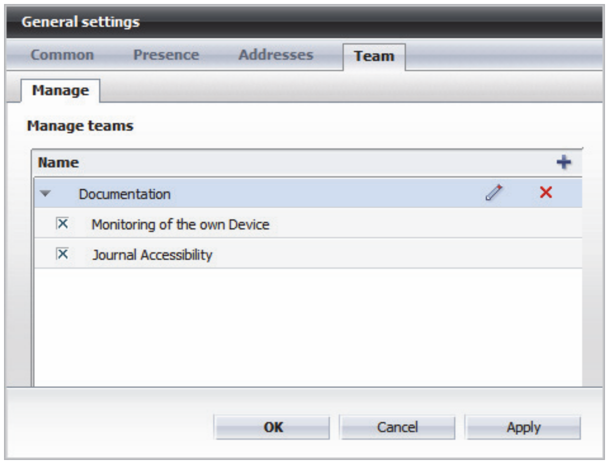
- You have team administrator privileges, i.e. the system administrator has assigned you the default **Team Administrator** profile or another profile with the privilege of **managing groups** in the CMP.

To create a new team proceed as follows:

Step by Step

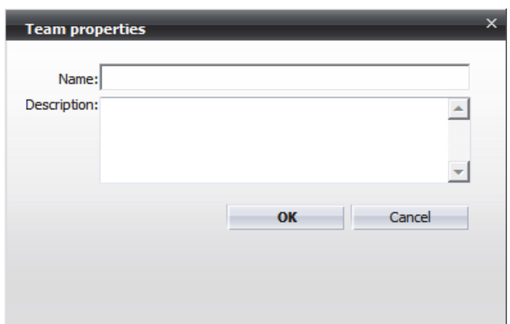
1) Click on ✎ in the **Team View** window.

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**.

6.7.2 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:

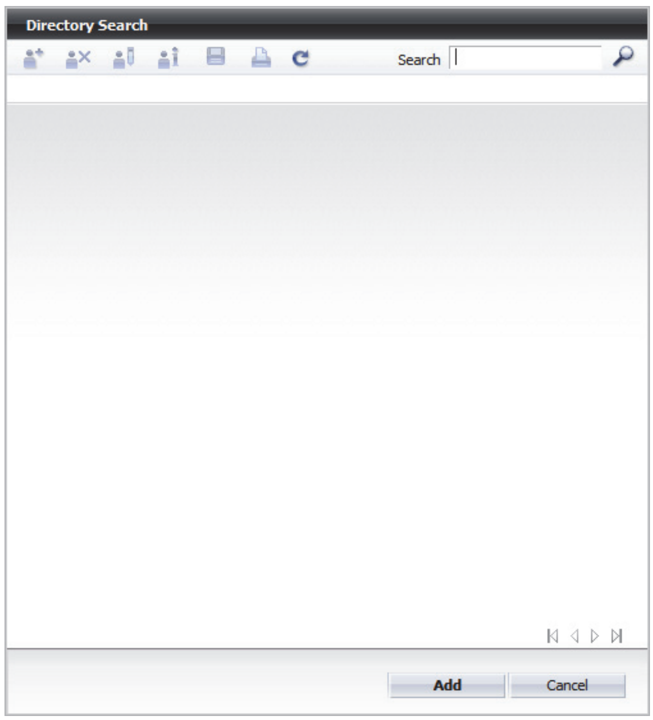
Step by Step

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.

6.7.3 How to Start a Ad-hoc Conference

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

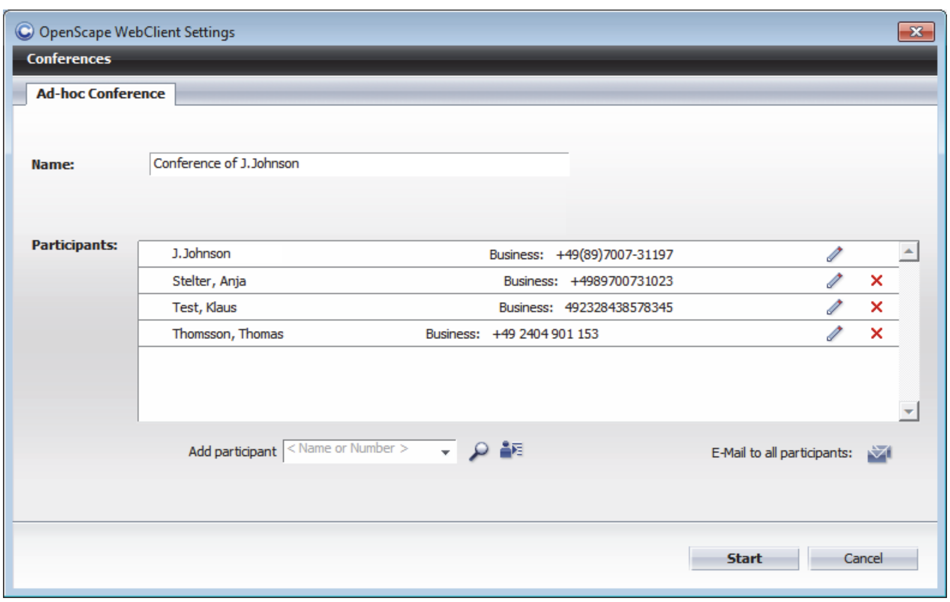
How to start an Ad-hoc conference with selected participants:

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 .

6.7.4 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.

6.7.5 How to Initiate a Merge Calls Conference

In the following we describe how you expand a consultation call to a server-based conference with three participants to which further conference participants can be added.

Execute the following steps to initiate a Merge Calls conference:

Step by Step

1) Call the first conversational partner.
2) Make a consultation call to the second conversational partner.

   The first connection is being held.

3) Click on in the area of the held call.

   Both active calls are transferred to the conference server of the OpenScape UC Application. A conference between the subscribers is being initiated. The three conversational partners are interconnected.

NOTICE: The conference ends as soon as the conference initiator hangs up.

6.7.6 How to Initiate a Merge Calls Video Conference

This section describes how you expand a video consultation call to a server-based video conference with three participants to which further conference participants can be added.

Prerequisites

- The OpenScape Desktop Client Enterprise Web Embedded Edition is connected to an OpenScape Voice V5 or later.
- You have an installed and operable video camera.
- In the **SIP Service Provider** settings you have configured and selected a video scheme that uses your operable video camera.
- For the video scheme you have selected in the **Settings > Advanced > SIP Service Provider > Video schemes** dialog the **Preview** is disabled (**off**).

Execute the following steps to initiate a Merge Calls video conference:

Step by Step

1) Call the desired conversational partner.

The **Call Control** function window opens automatically and displays the active call.

2) Click in the Softphone menu on .

The **Video** window opens, showing your own image.

3) Click in the Softphone toolbar of the **Video** window on .

Your own image appears in a red frame. It is transmitted to the connection partner.

> ***NOTICE:*** If your connection partner has a video camera too and switched his/her image to the conference in the same way, this image appears automatically in your **Video** window. You cannot control or activate/deactivate receiving video images.

4) In the **Call Control** function window, enter the phone number of the subscriber you wish to consult in the **New Call** input field.

5) Click on to the right of the **New Call** field.

The call is initiated and listed in the **Call Control**. The first connection as well as the first video streaming are held. The video image of the held participant is not displayed. Instead, the image of the consulted participant is transmitted.

6) Click on in the area of the held call.

Both active calls are transferred to the conference server of the OpenScape UC Application. A video conference is initiated between the subscribers. The three conversational partners are interconnected. Each participant sees in his/her **Video** window two video images: his/her own image and an image in which a mix of the other participants' video images is displayed.

> ***NOTICE:*** The Merge Calls video conference ends as soon as the conference initiator hangs up.

6.7.7 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.

6.7.8 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**.

6.7.9 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.

6.7.10 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.

6.7.11 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.

6.7.12 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.

> ***NOTICE:*** In case of a MeetNow! conference you can enter the PIN via computer keyboard or phone keypad even if the video window is in focus.

3) Conclude the PIN entry with the # key.

   You are directly connected to the MeetNow! conference. If you have an operable video camera as well as a configured video scheme in the **SIP Service Provider** settings, the video window opens automatically.

6.7.13 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.

6.7.14 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.

6.7.15 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.

6.7.16 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.

7 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**

7.1 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

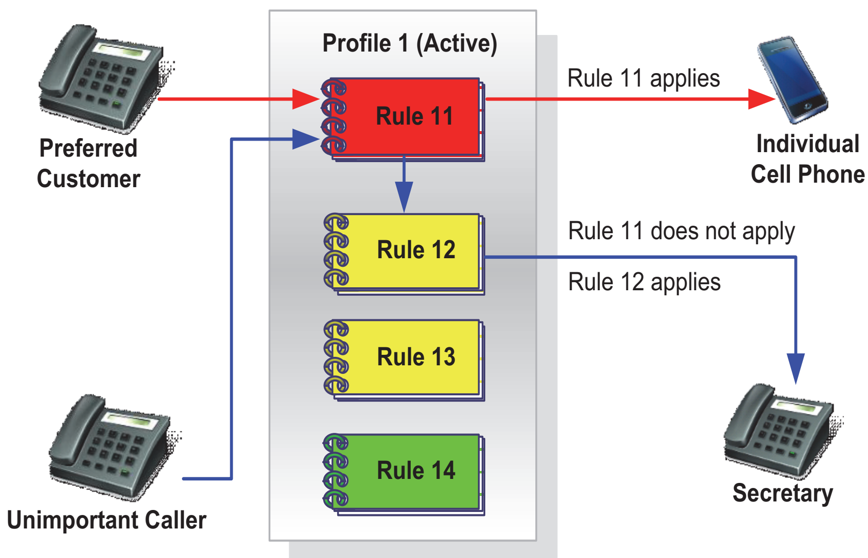
A rule defines how to handle incoming calls, for example if they are to be redirected or put through to you.

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.



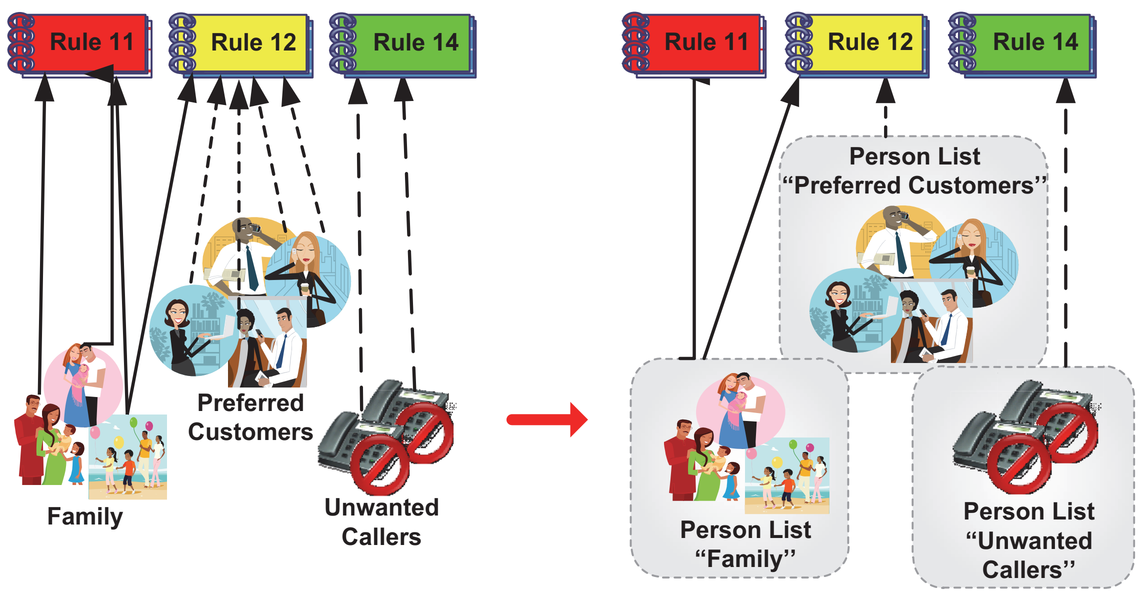
Four rules of different priority have been assigned to profile 1. Rule 11 has the highest priority. Rule 12 and rule 13 have medium priority, with the priority of rule 12 within this profile being higher than the one of rule 13, as rule 12 is on a higher position in the list of rules than rule 13. Rule 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.

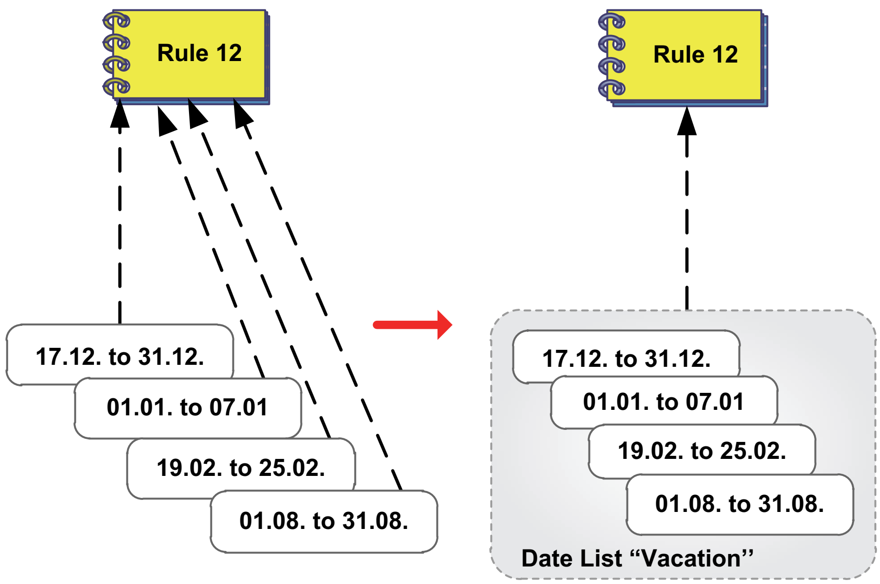
List of persons



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.

7.2 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.

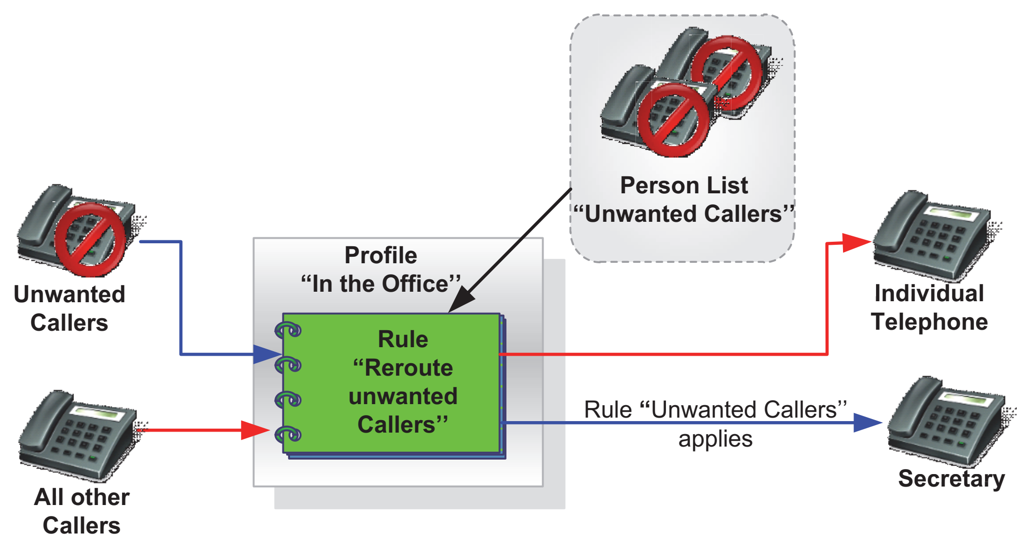
7.2.1 Scenario 1: "In the Office"

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.

7.2.1.1 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.

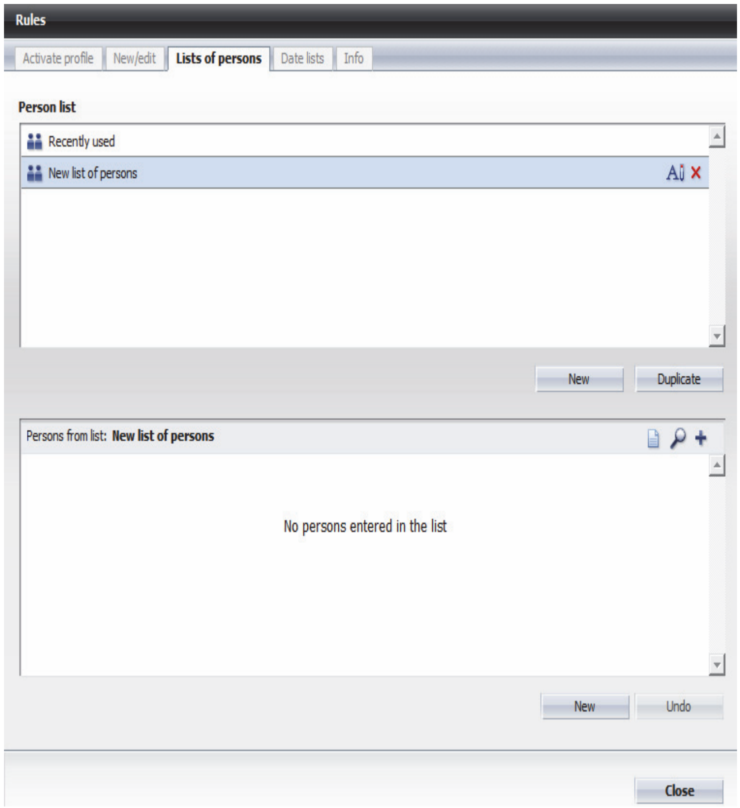
NOTICE: The "In the Office" profile has been created. However, it does not contain any rules yet.

---

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.

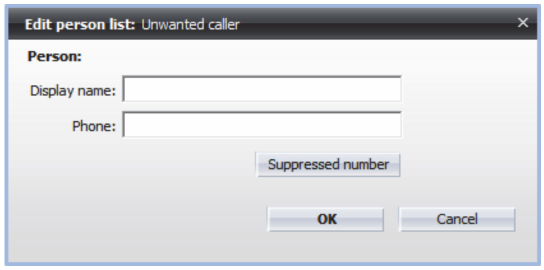
The "Unwanted callers" list of persons is displayed in the **List of persons** section. The list does not contain any person entries yet.

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.

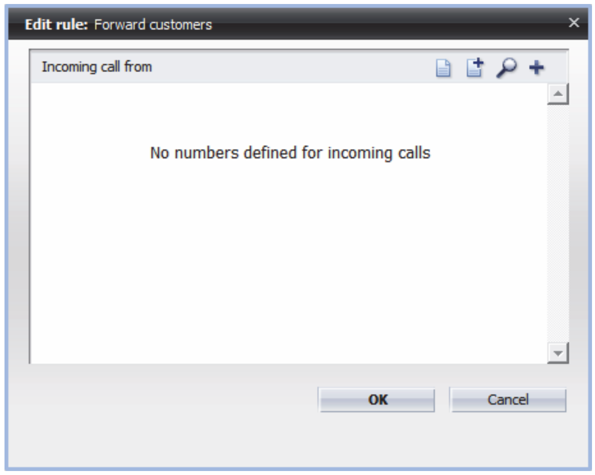
The rule "Redirect calls" appears in the **Rule** list.

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**.

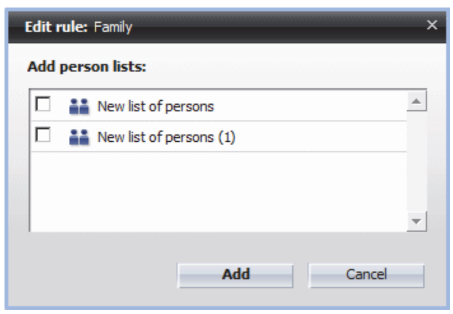
b) In the lower section, click on **If call from**.

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.

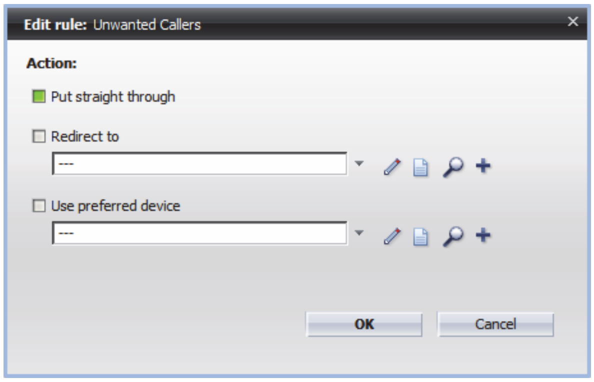
The list of persons you selected has been added to the rule. The selection dialog closes.

e) Click on **OK**.

Your rule settings in the **If call from** section have been applied.

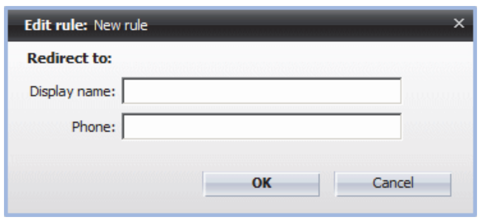
f) In the lower section, click **Action**.

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**.

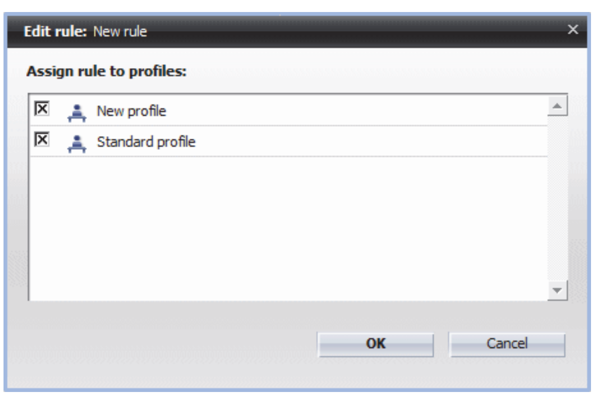
The input dialog closes. The **Redirect to** function is active ( ).

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.

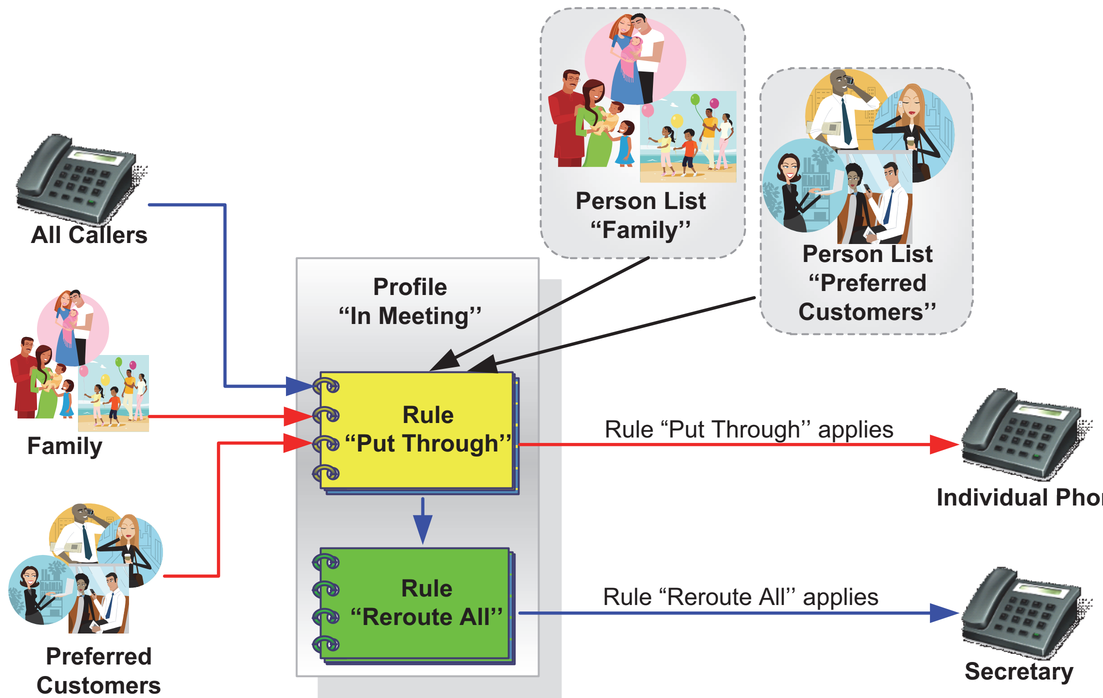
7.2.2 Scenario 2: "In Meeting"

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.

7.2.2.1 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.

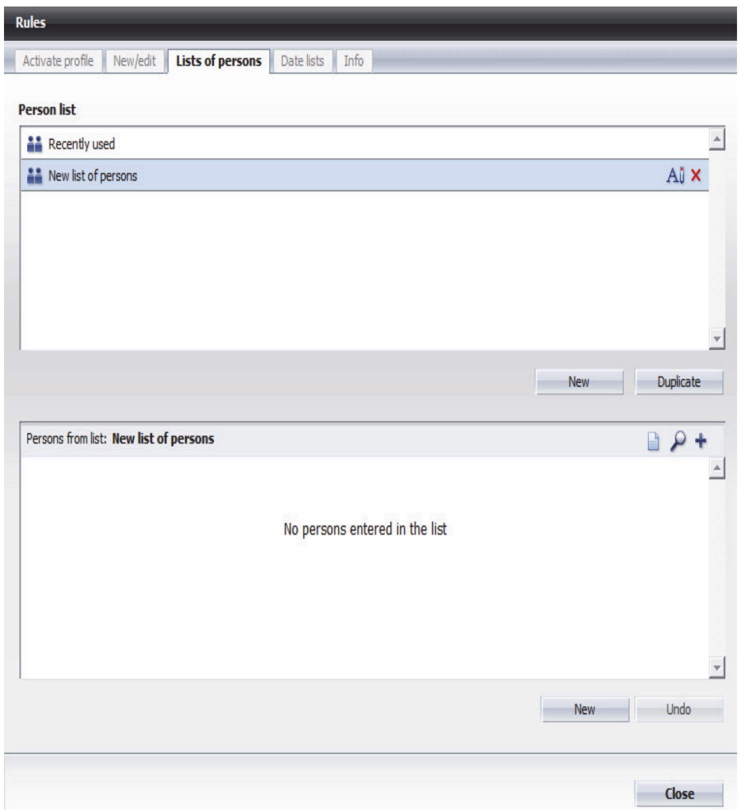
NOTICE: The "In meeting" profile has been created. However, it does not contain any rules yet.

---

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.

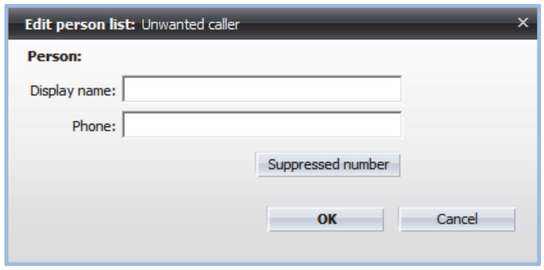
The "Family" list of persons is displayed in the **List of persons** section. The list does not contain any entries yet.

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.

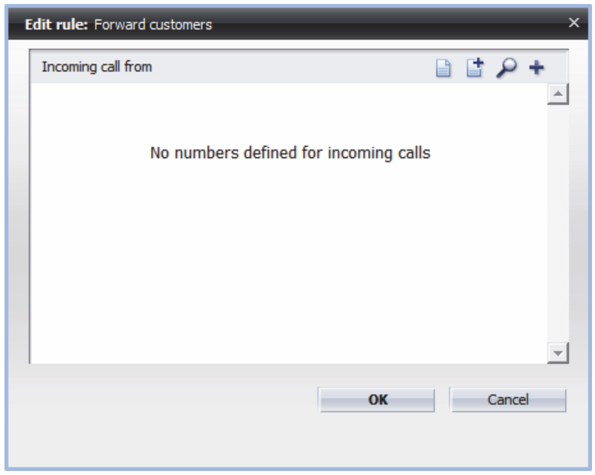
The rule "Put through" appears in the **Rule** list.

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**.

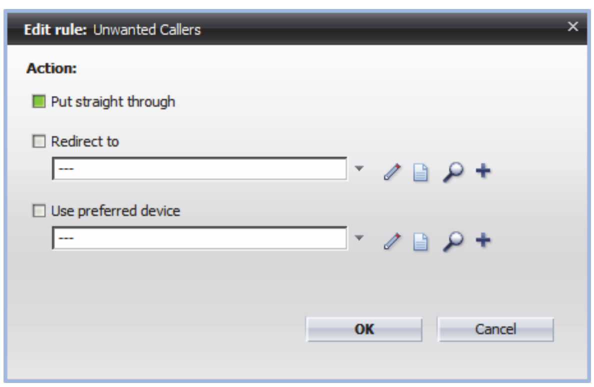
A selection dialog opens that allows you to set the desired presence status.

d) Activate the **In meeting** check box and click on **OK**.

The selection dialog closes.

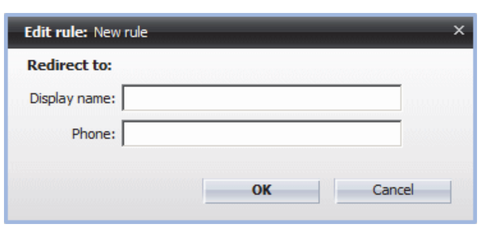
e) In the lower section, click **Action**.

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.

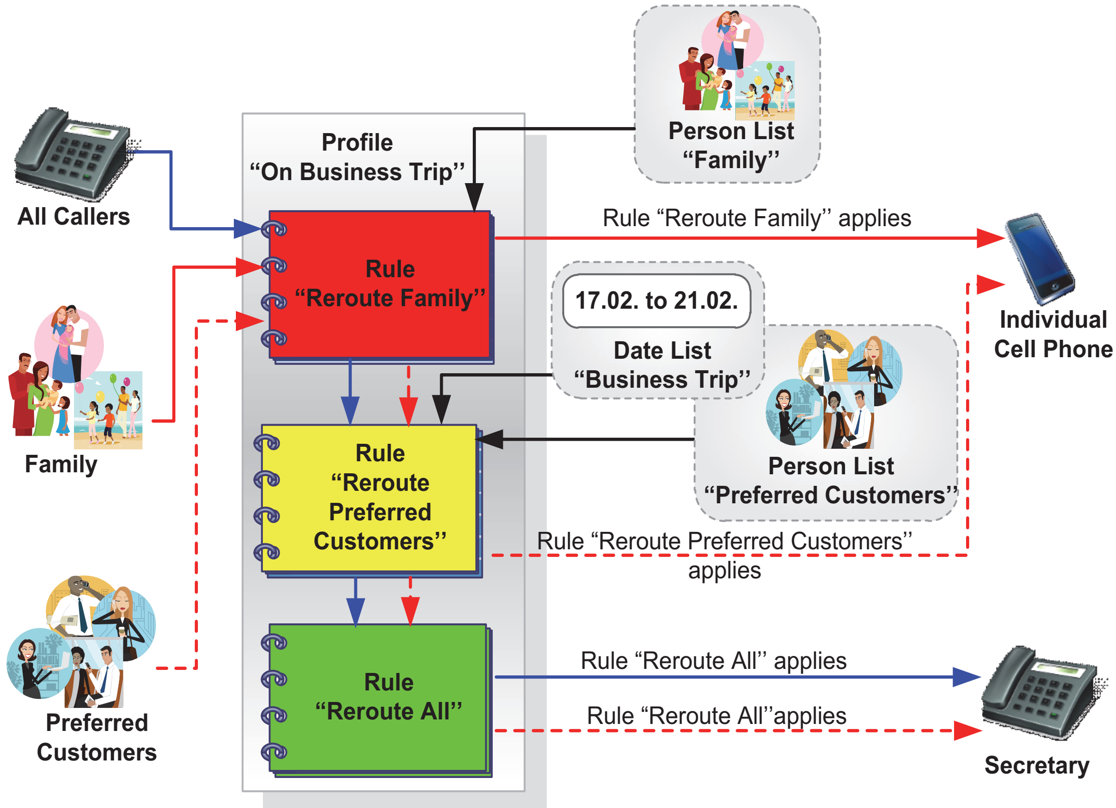
7.2.3 Scenario 3: "On Business Trip"

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.

7.2.3.1 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**.

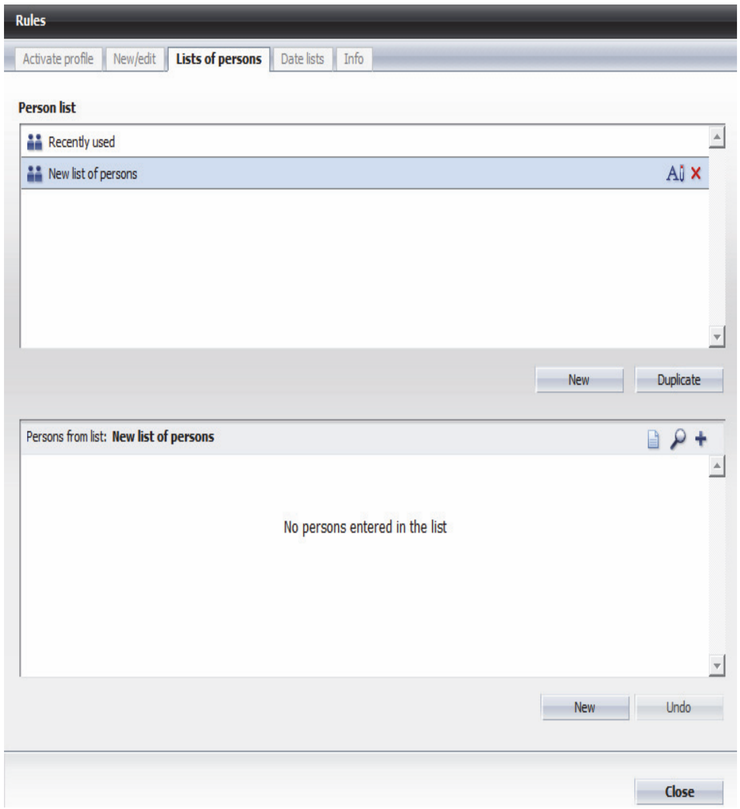
The new profile is displayed with the new name "On Business Trip" in the **Profiles** list.

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.

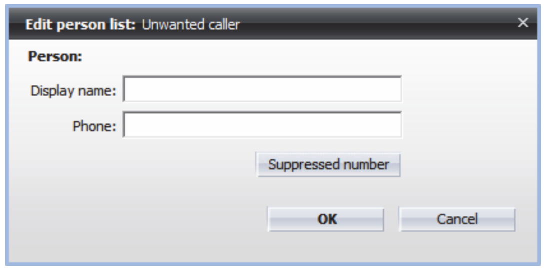
The "Family" list of persons is displayed in the **List of persons** section. The list does not contain any person entries yet.

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.

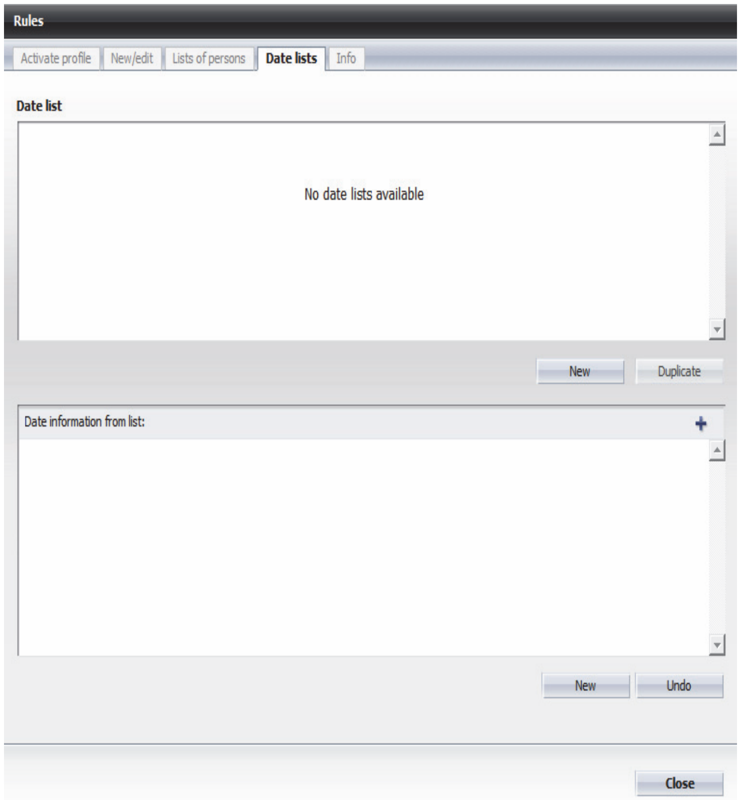
The list of persons "Preferred customers" is displayed in the **List of persons** section. The list does not contain any entries yet.

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.

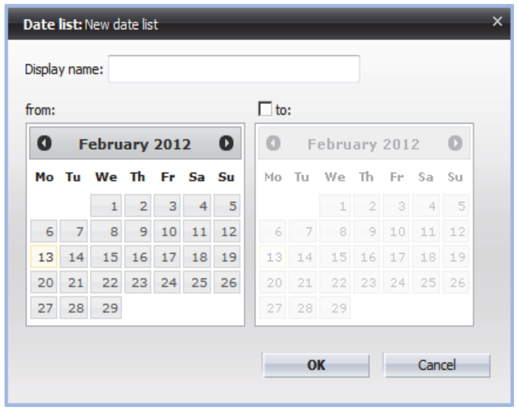
d) Enter the name "Business trip" for the date list and push the **return key** on your keyboard.

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.

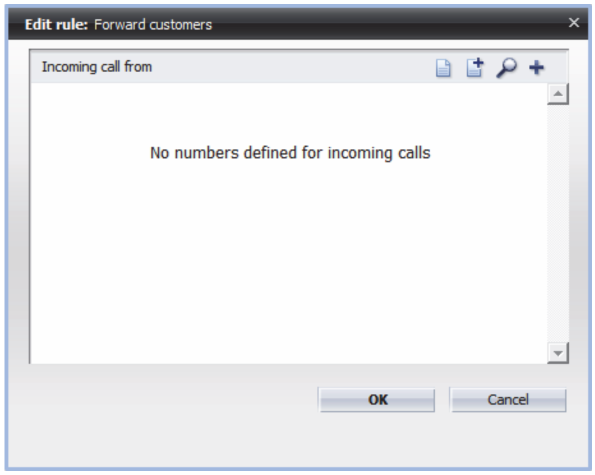
The rule "Redirect family" appears in the **Rule** list.

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.

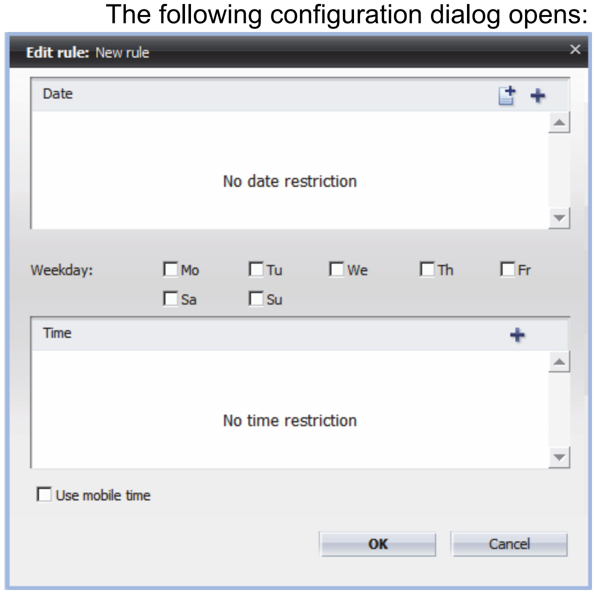
The selected list of persons has been added to the rule. The selection dialog closes.

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.

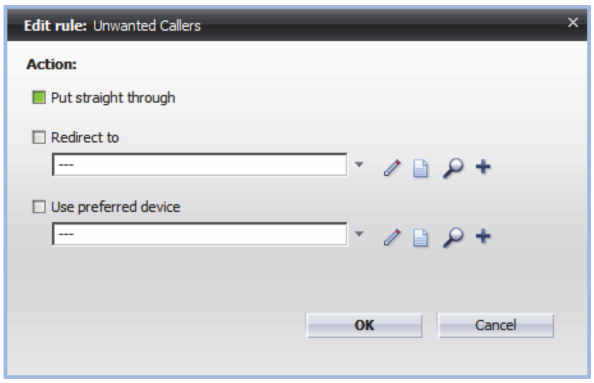
The selection dialog closes. The date list "Business trip" is displayed in the **Date** section.

k) Click the **OK** button in the configuration dialog.

The configuration dialog closes.

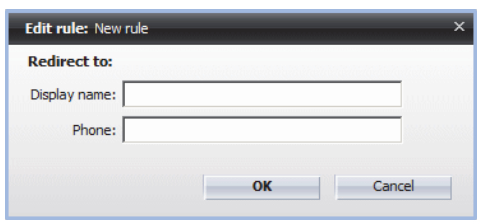
l) In the lower section of the **New/edit** tab, click **Action**.

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.

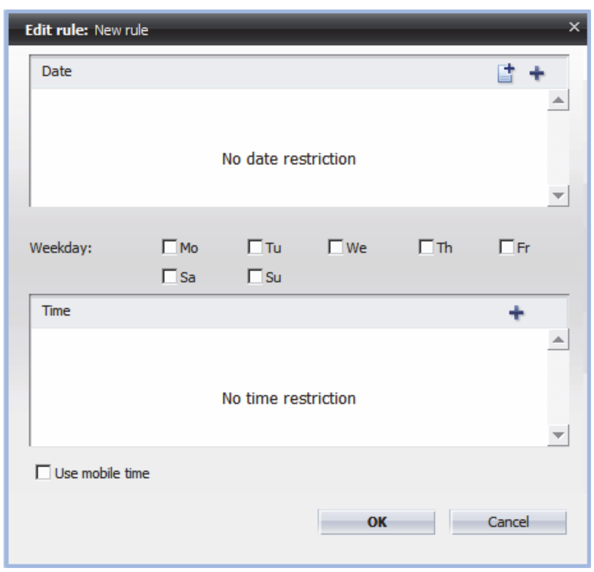
The selected list of persons has been added to the rule. The selection dialog closes.

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".

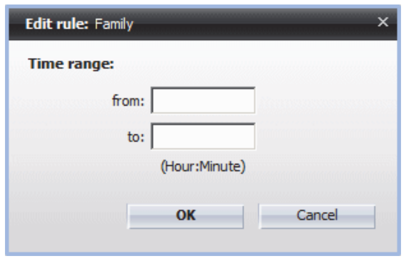
j) Click on the **Add** button.

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**.

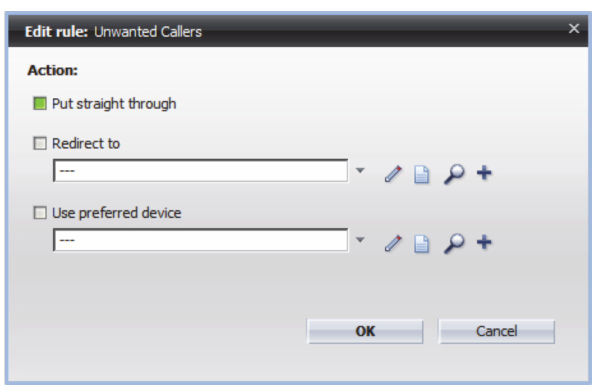
The input dialog closes. The configured time range is displayed in the **Time** section.

o) Click on **OK**.

The configuration dialog closes. Your settings have become valid.

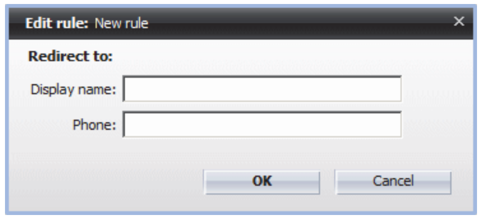
p) In the lower section, click on **Action**.

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.

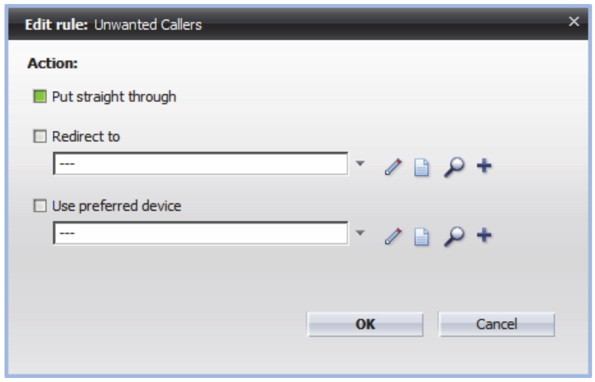
13) Perform the following settings for the rule "Redirect all".

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**.

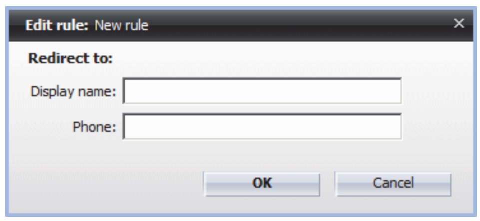
c) In the lower section, click on **Action**.

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.

7.3 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.

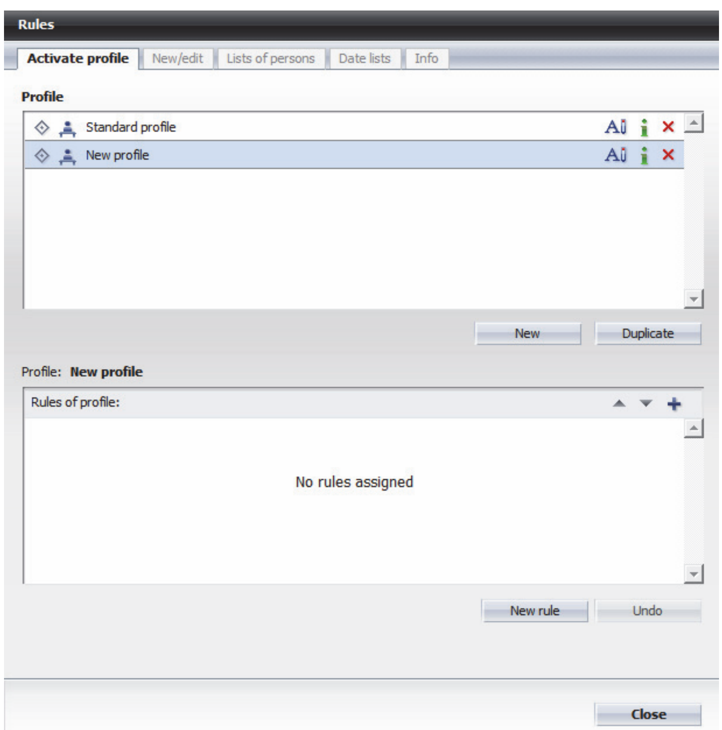
All dialogs in which you define profiles, rules, lists of persons and date lists can be invoked via the main menu under **menu > Rules ...**.

7.3.1 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:

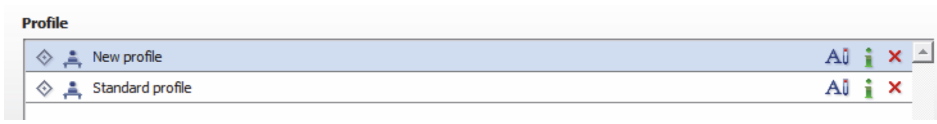


The **Activate profile** tab is divided into two sections:

- **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:

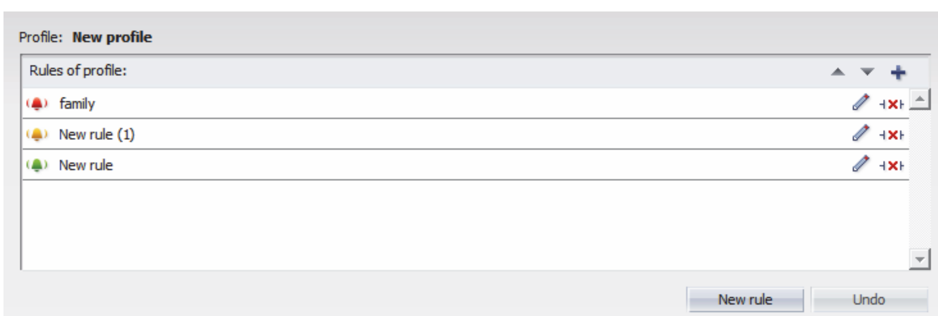
- - You activate/deactivate the profile by clicking this button that precedes the profile name. An active profile is indicated by .
- - Click this button to modify the name of a profile.

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:

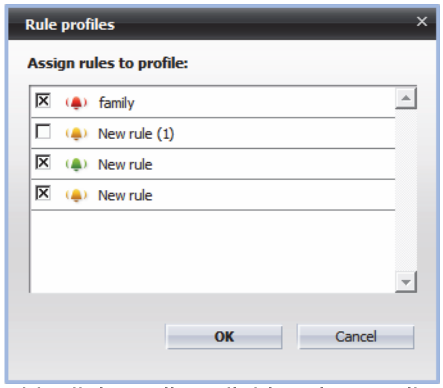


This area shows the rules, with priority groups marked as follows: - **High**, - **Normal**, - **Low**. This area offers access to the following functions:

- - 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.

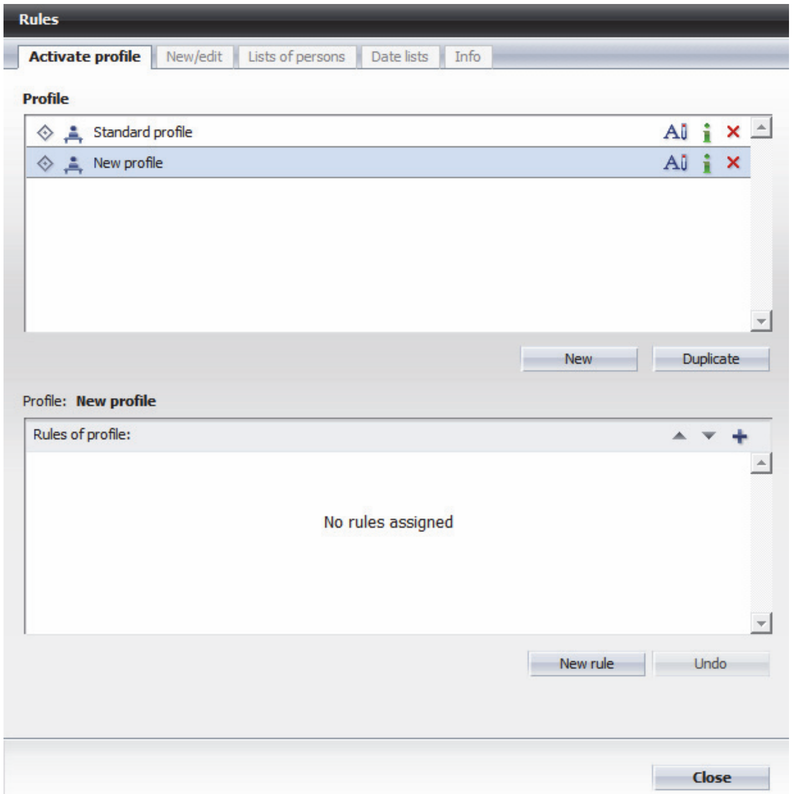
7.3.1.1 How to Create a new Profile

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.

7.3.1.2 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.

7.3.1.3 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.

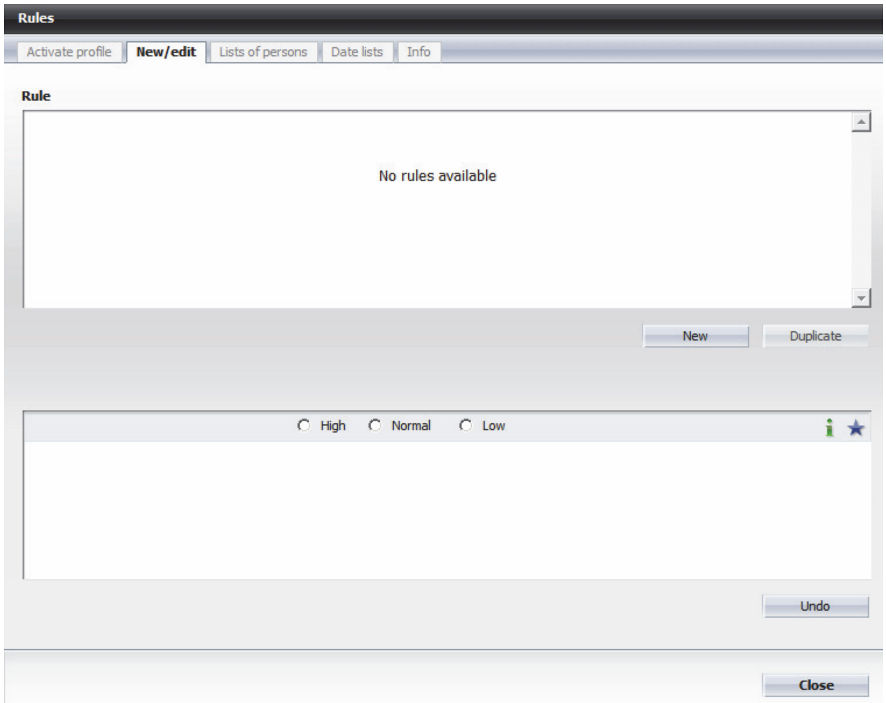
7.3.2 New/edit Tab

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:

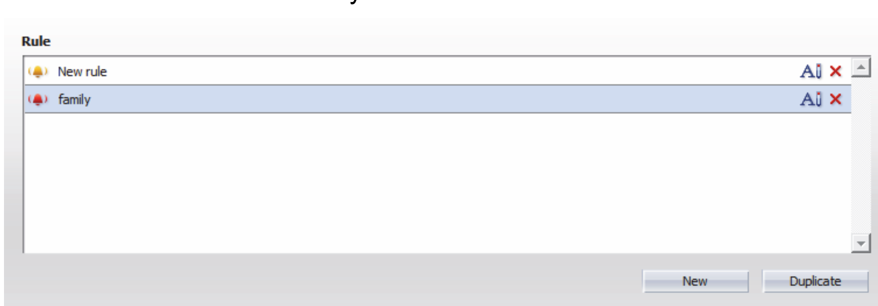


The **New/edit** tab is divided into two sections:

- **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:

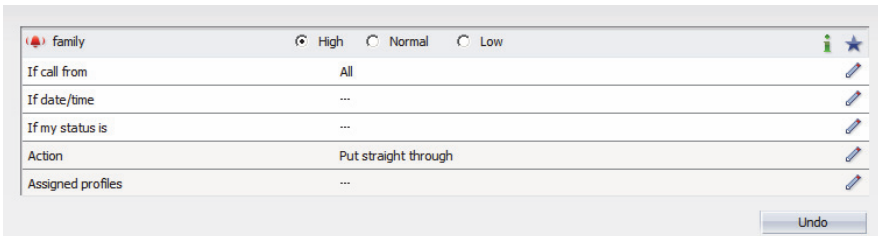
-  - Click this button to modify the name of a rule.

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:

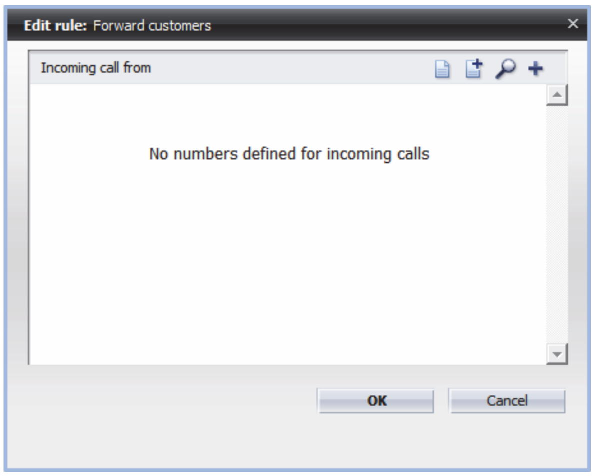
- **If Call from**
- **If date/time**
- **If my status is**
- **Action**
- **Assigned profiles**

Click or simply the corresponding line to open a dialog for each of these settings where you can perform the corresponding rule setting.

7.3.2.1 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.

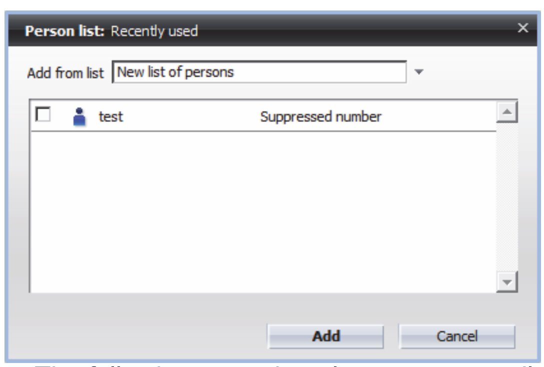
In the lower section of the **New/edit** tab, click on the icon of the **If call from** entry or on the entry itself to open the following dialog:



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:

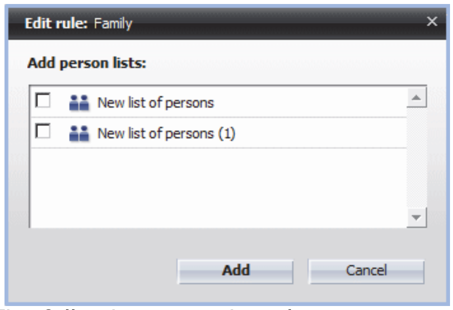


The following operating elements are available in this dialog:

  – 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.

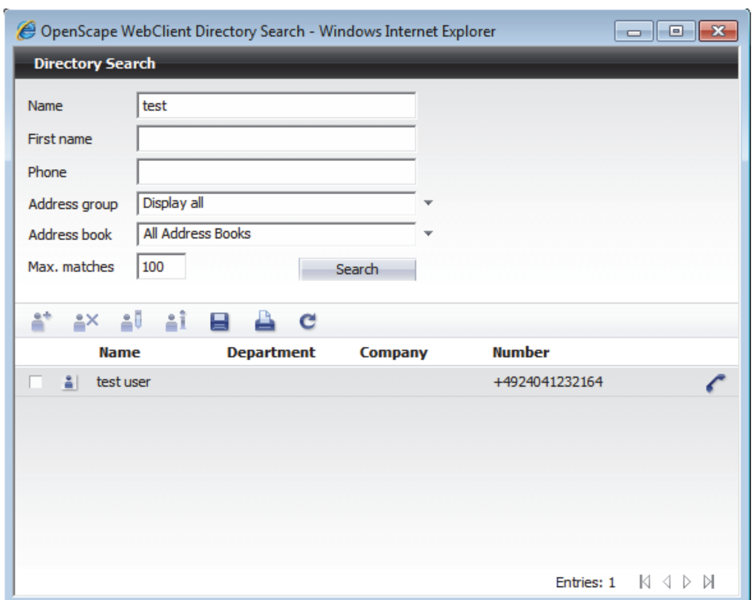
- - Click this button to assign an already defined list of persons to the rule. The following dialog opens:



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.

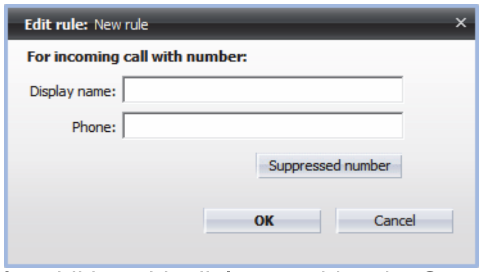
> ***NOTICE:*** This function is not permitted for selected search hits from a directory.

– - 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.

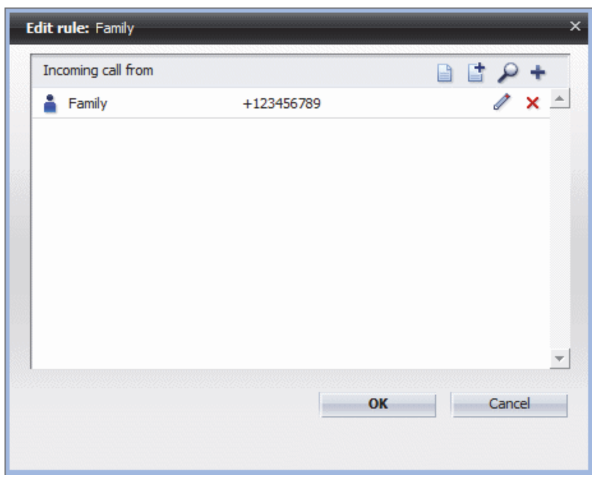
– - Click this button to view the existing information for a user you have been looking for. It is displayed in the opened **Lookup person** dialog.
– - Click this button to save the contact entries found locally on your computer.
– - Click this button to print the contact entries found in tabular form.
– - 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:



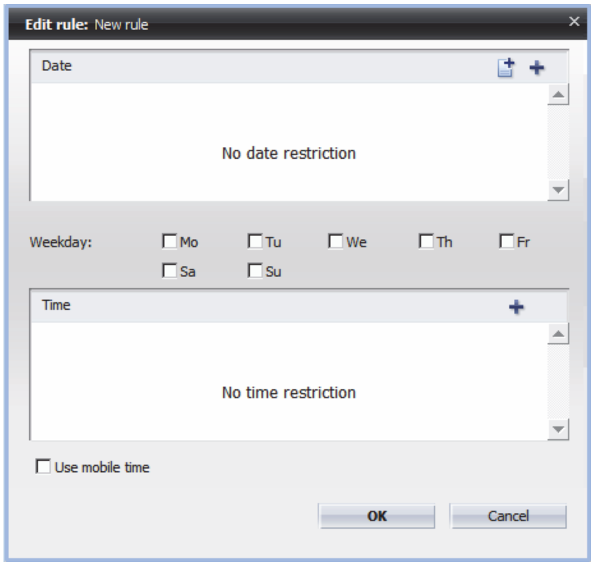
You can apply the following actions to a person entry:

- - 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.

7.3.2.2 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.

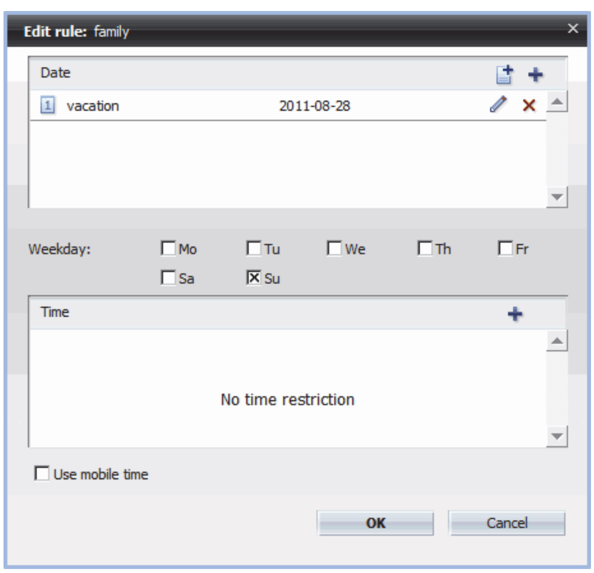
In the lower section of the **New/edit** tab, click on the icon of the **If date/time** entry or on the entry itself to open the following dialog:



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.

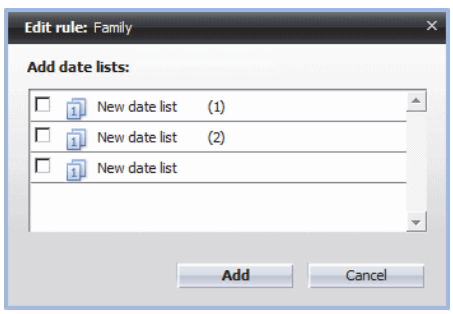
> ***NOTICE:*** Make sure that you have set the correct time zone in the main menu **menu > General ... > Common tab > Appearance tab** under **Mobile time zone**.

- **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

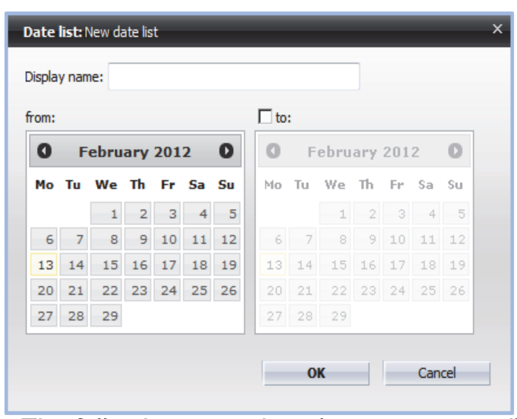
The following operating elements are available in this section:

- - 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:

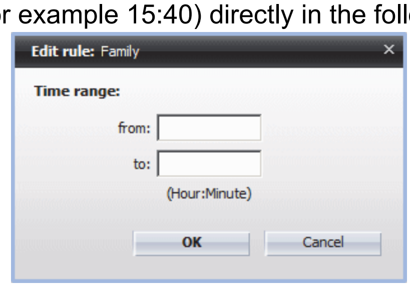
- - Click this button to move one month back.
- - Click this button to move one month forward.
- - Click this button to return to the current month.
- - Click this button to move one year back.
- - Click this button to move one year forward.

- - 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.

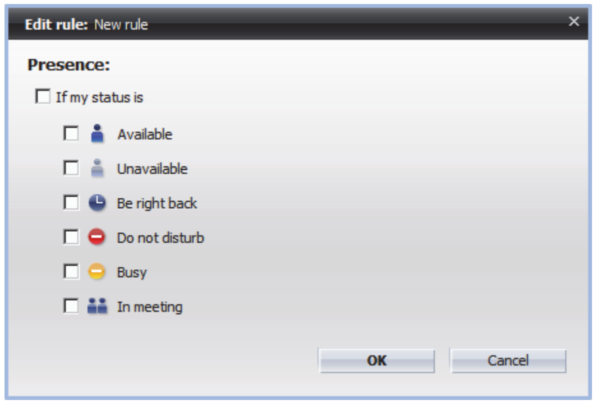


- - Click this button to modify an already defined time.
- × - Click this button to remove an already defined time.

7.3.2.3 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:

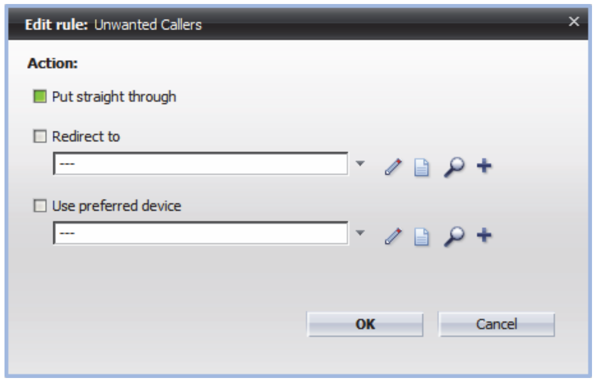
Status	Description
	Signal for the other OpenScape UC Application users that you can be reached at your workstation.
	Signal for the other OpenScape UC Application users that you cannot be reached at your workstation.
	Signal for the other OpenScape UC Application users that you can be reached at your 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 cur-rently 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.

7.3.2.4 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:

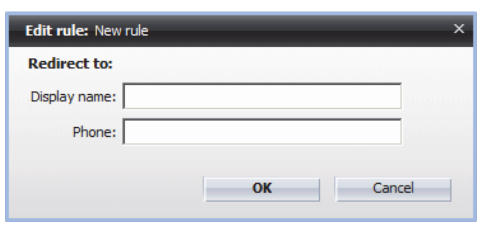


The dialog allows you to access the following features:

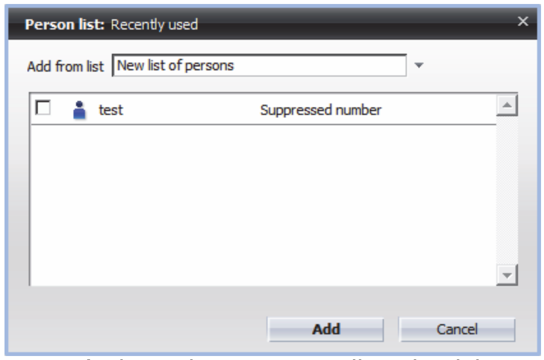
- **Put straight through** - With this option being active ( ), all incoming calls are put through to the currently set device from your device list.
- **Redirect to** - Activate this combo box ( ) to configure the device or person to direct your incoming calls to. The calling subscriber sees the phone 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.

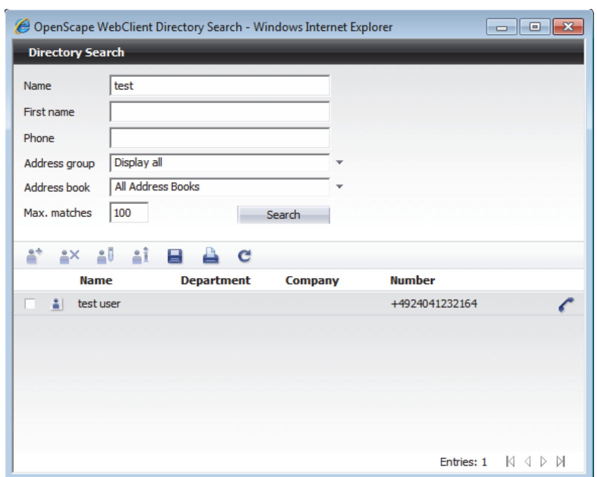


– - Click this button to add one or more persons from an existing list of persons to the rule as forwarding destination. The following dialog opens:



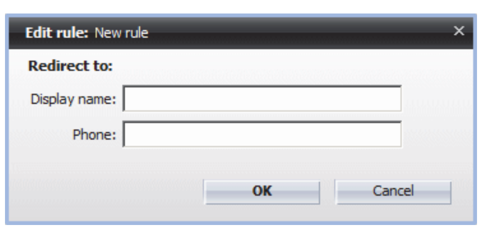
Activate the corresponding check box and click the **Add** button to add the selected person to the rule as forwarding destination.

– - 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.

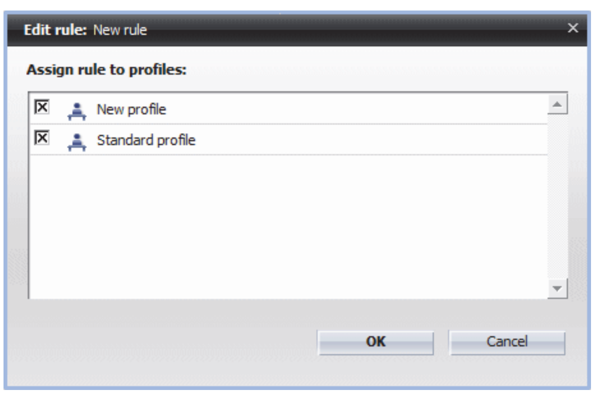
  > ***IMPORTANT:*** All devices available in this selection list (except for the ONS device) are also listed in the bottom section of the **Lists of persons** tab and can be removed from the selection list only via this tab (×).

- **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.

7.3.2.5 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.

7.3.2.6 How to Create a new Rule

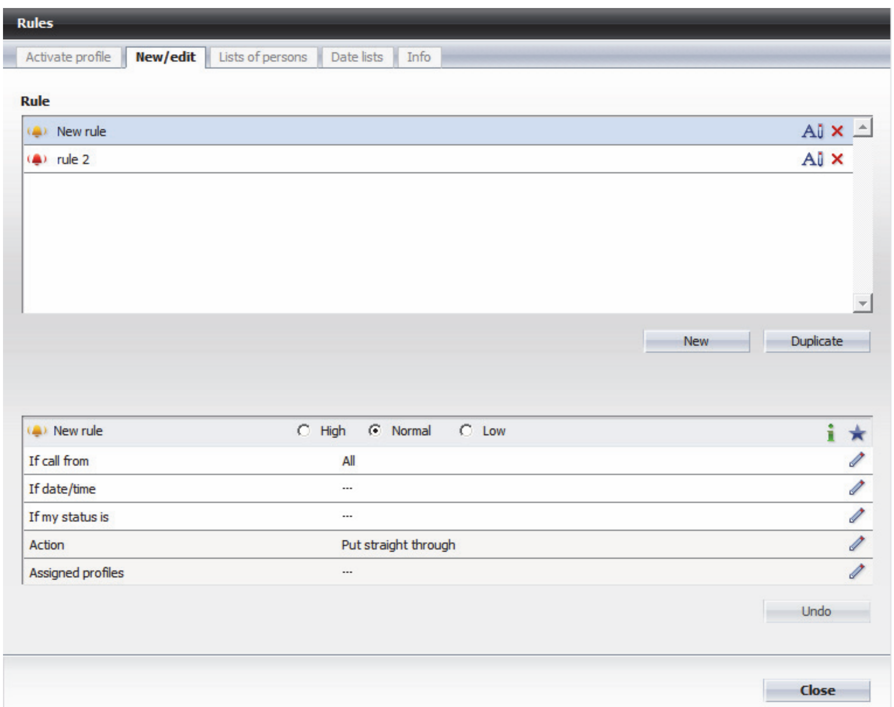
This section describes the steps for creating a new call rule and for specifying your settings. The entries you see in the figures are examples. The settings can be performed as described in the example scenarios. But you can also customize the settings.

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.

7.3.2.7 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.

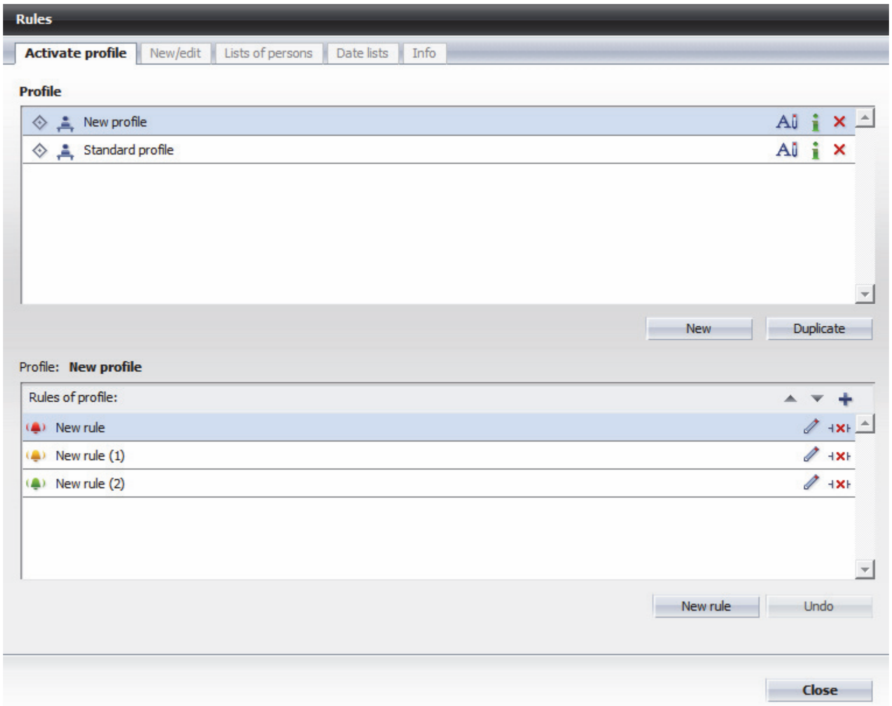
Prerequisites

- 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.

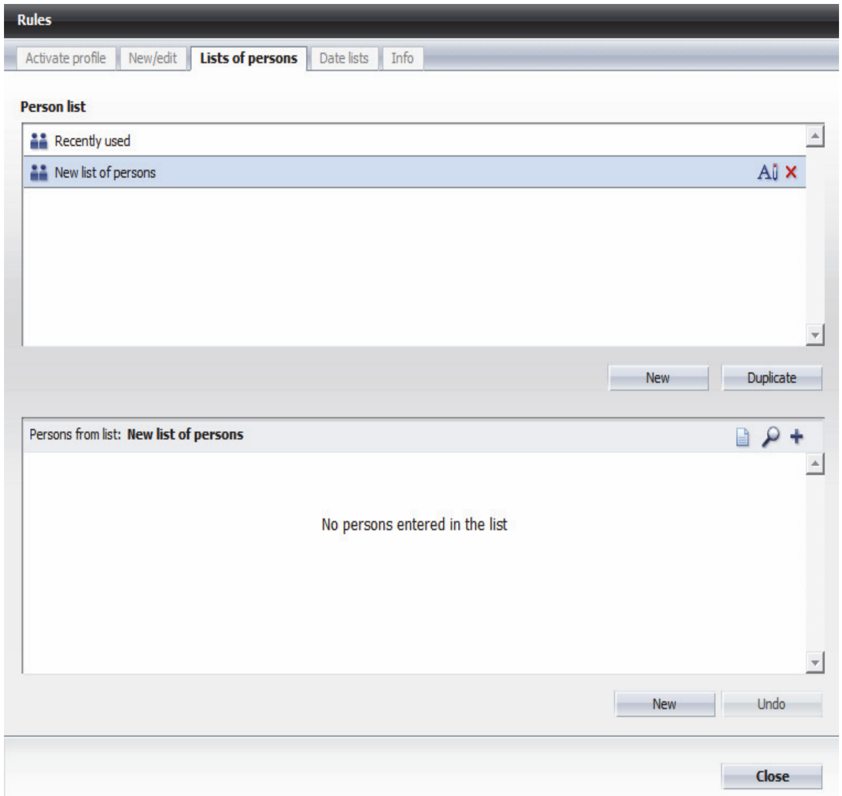
By moving the rule up, its priority increases within the group and the rule will be processed earlier.

7.3.3 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:

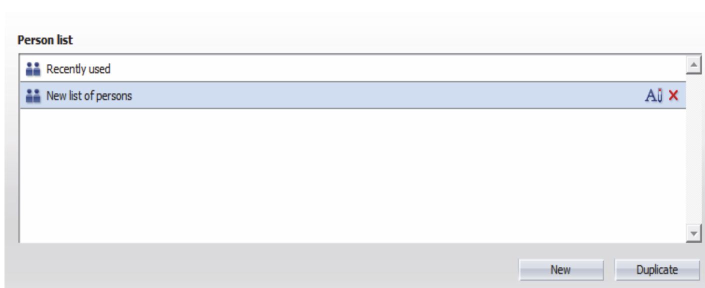


The **List of persons** tab is divided into two sections:

- **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:

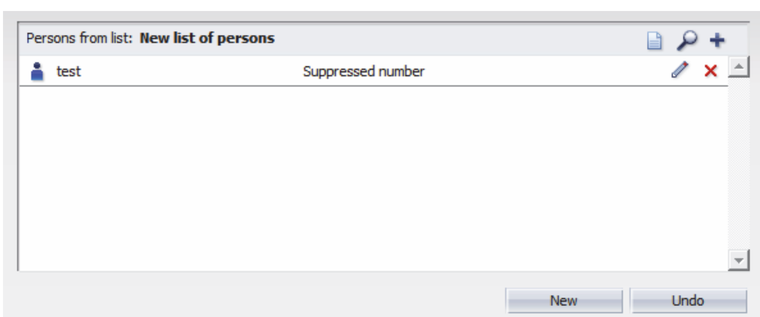
- - Click this button to modify the name of a list of persons.

> ***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.

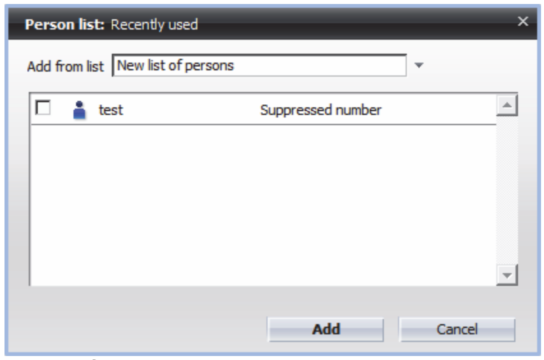
Controls in the Persons from list section

This section may look like this:



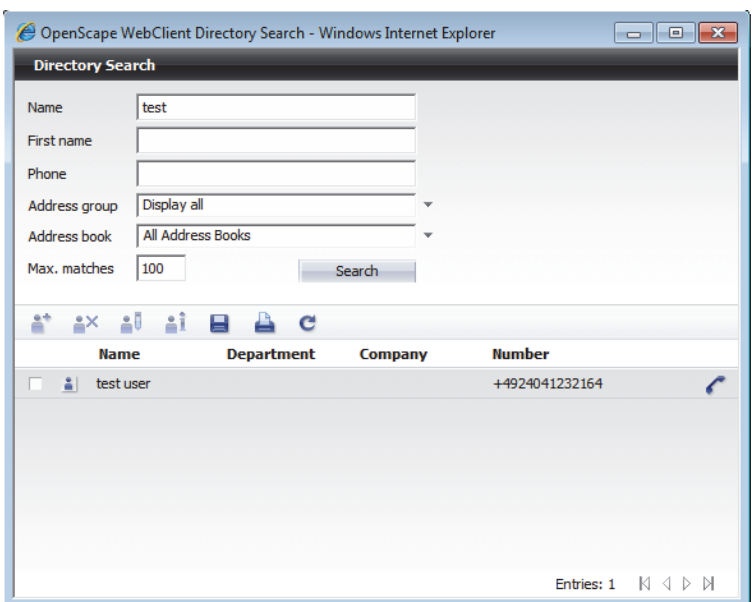
The following operating elements are available in the **Persons from list** section:

- - 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.

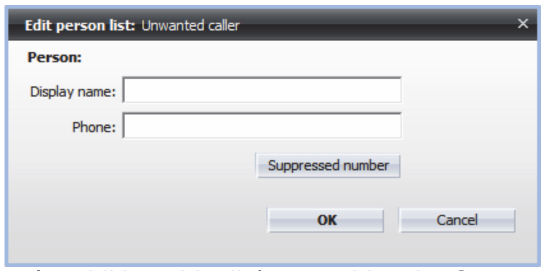
> ***NOTICE:*** This function is not permitted for selected search hits from a directory.

– - 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.

7.3.3.1 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:

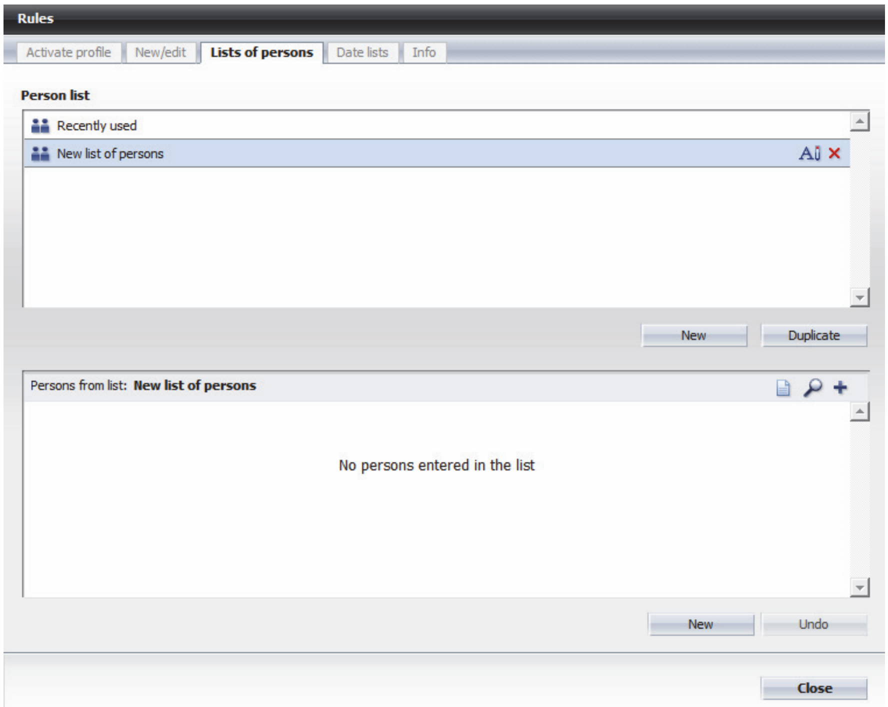
Step by Step

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.

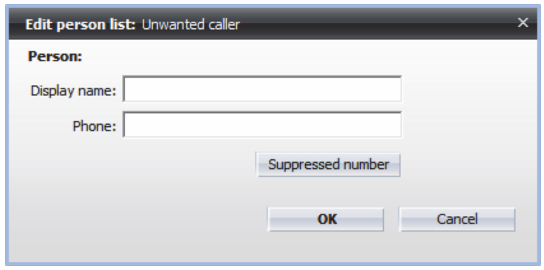
The name of the list of persons should now reflect your change: It does not contain any person entries yet.

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.

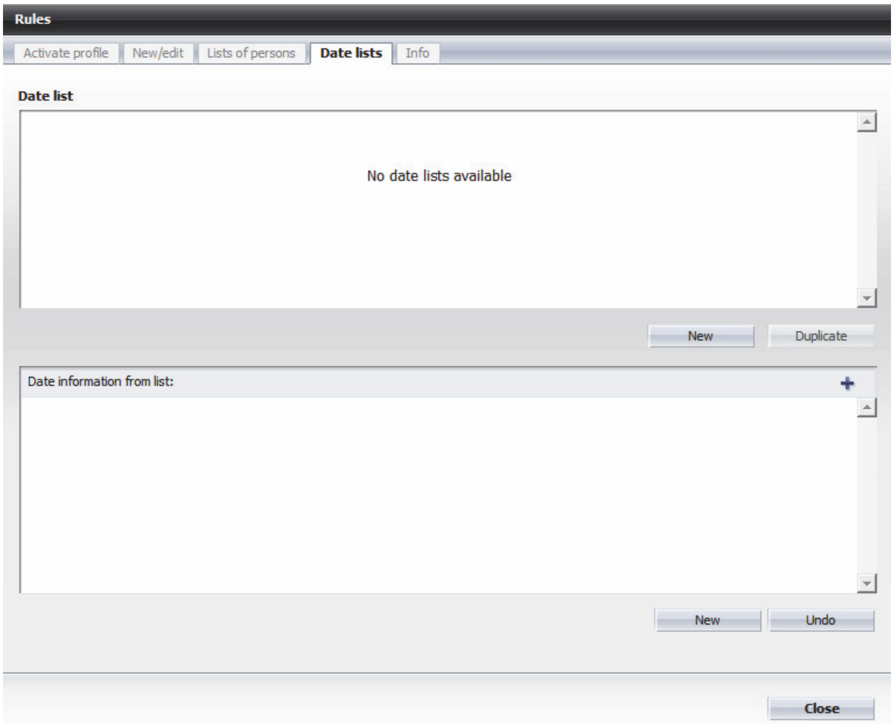
The new list of persons has been created and contains the desired person entries. However, it cannot be used by the rule interpreter as it has not been assigned to a rule yet.

7.3.4 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:

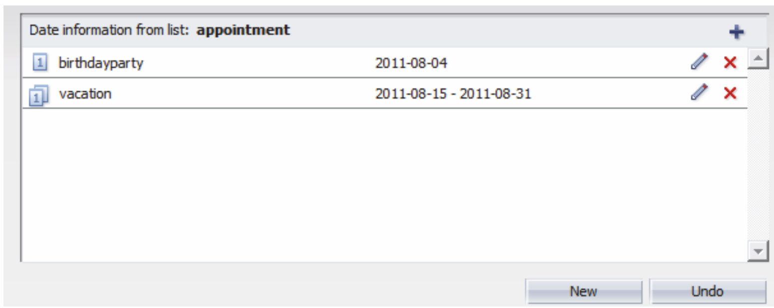
- - Click this button to modify the name of a date list.

  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.

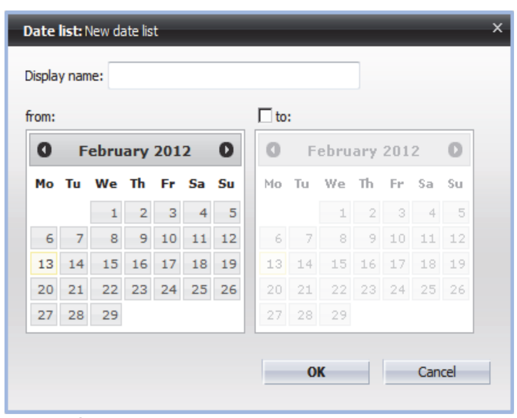
Controls in the Date information from list section

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.

7.3.4.1 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:

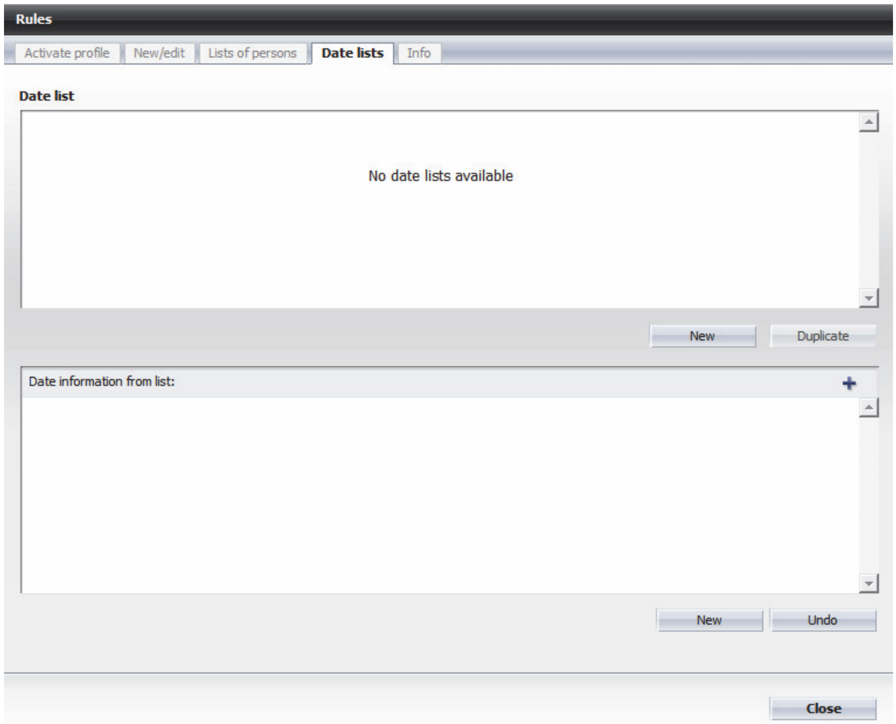
Step by Step

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.

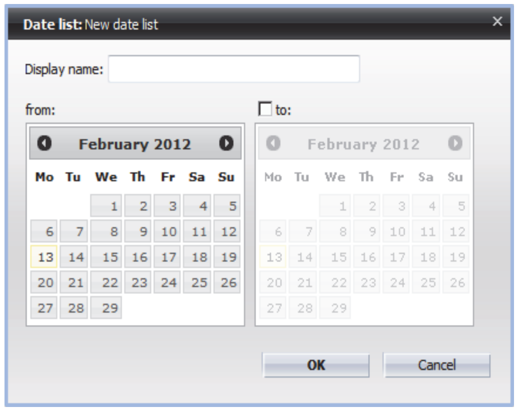
5) Enter a new name for the date list and push the **return key** on your keyboard.

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.

7.3.4.2 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.

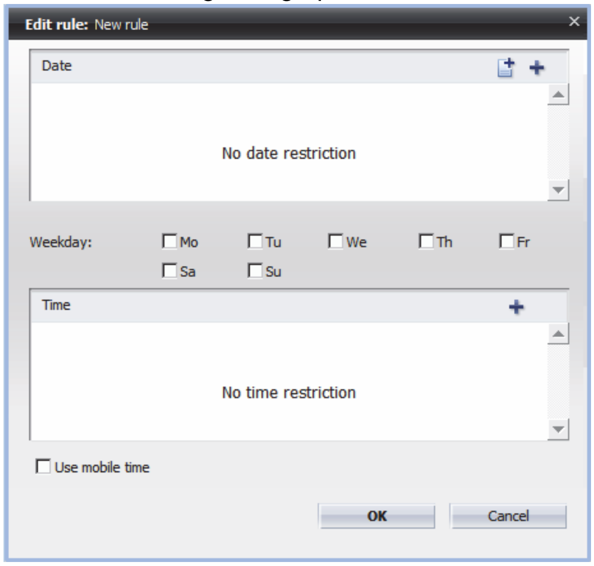
2) Switch to the **New/edit** tab.

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.

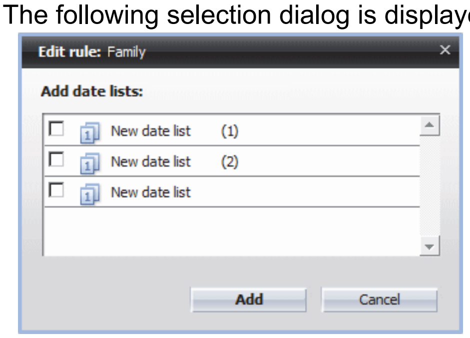
4) Click **If date/time**.

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.

7.3.4.3 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.

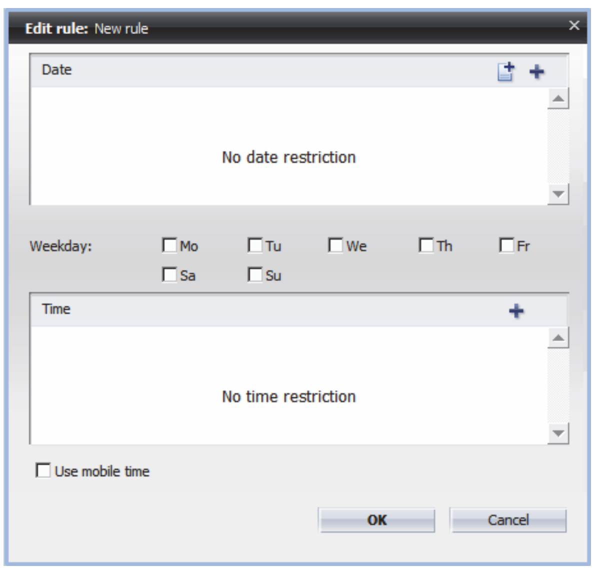
2) Switch to the **New/edit** tab.

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**.

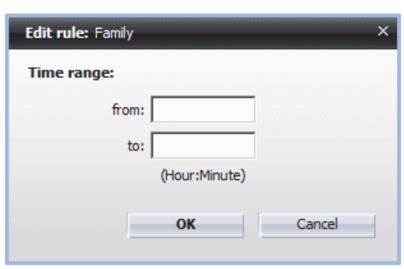
The following dialog opens:



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**.

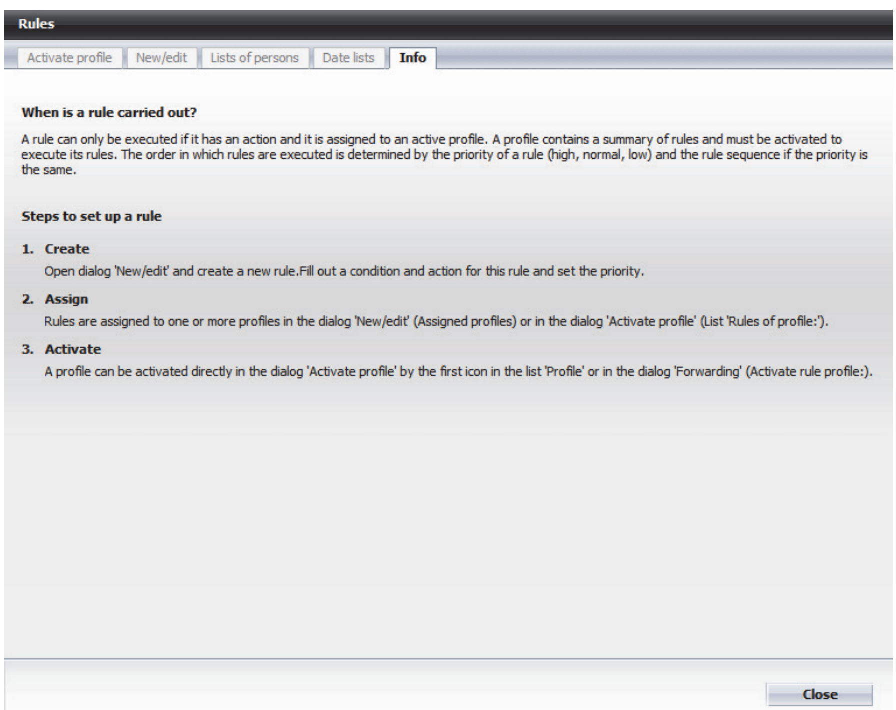
The dialog closes.

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**.

7.3.5 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 ...**.



8 Voicemail Settings

After you have invoked the **Voicemail...** option from the **menu**, you can perform settings for the voicemail system.

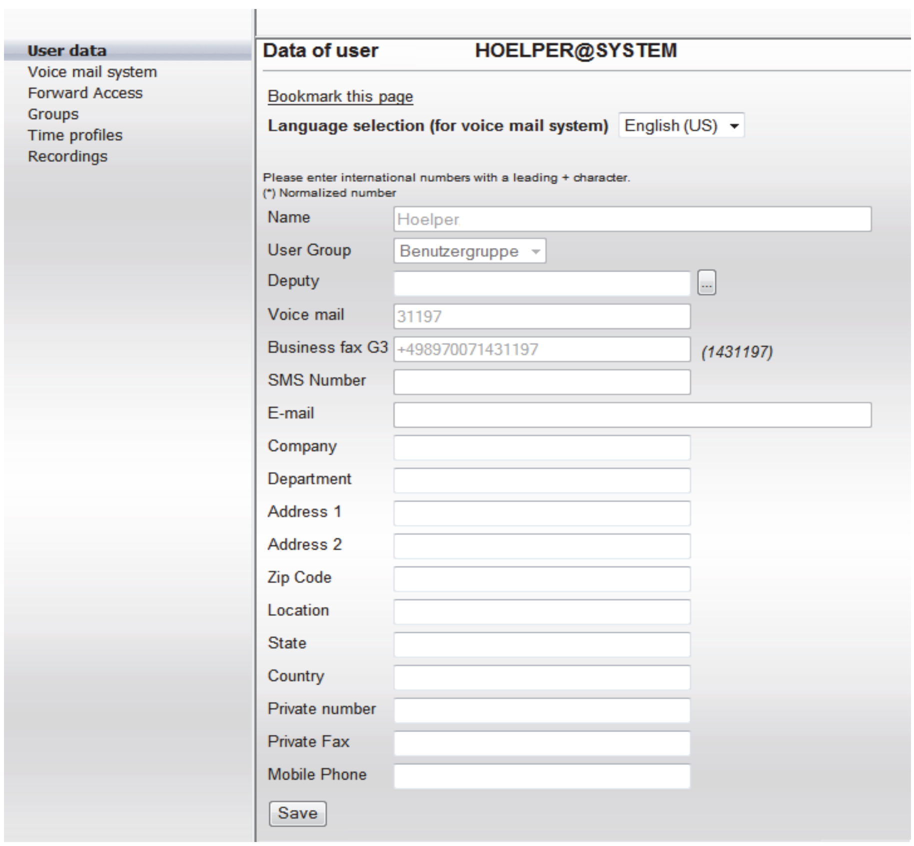
Via the navigation bar on the left-hand margin of the settings dialog you can open the configuration pages for the voicemail system. The following configuration pages are available:

- **User data**
- **Voice mail system**
- **Forward access**
- **Groups**
- **Time profiles**
- **Recordings**

8.1 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.

8.1.1 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.

8.1.2 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.

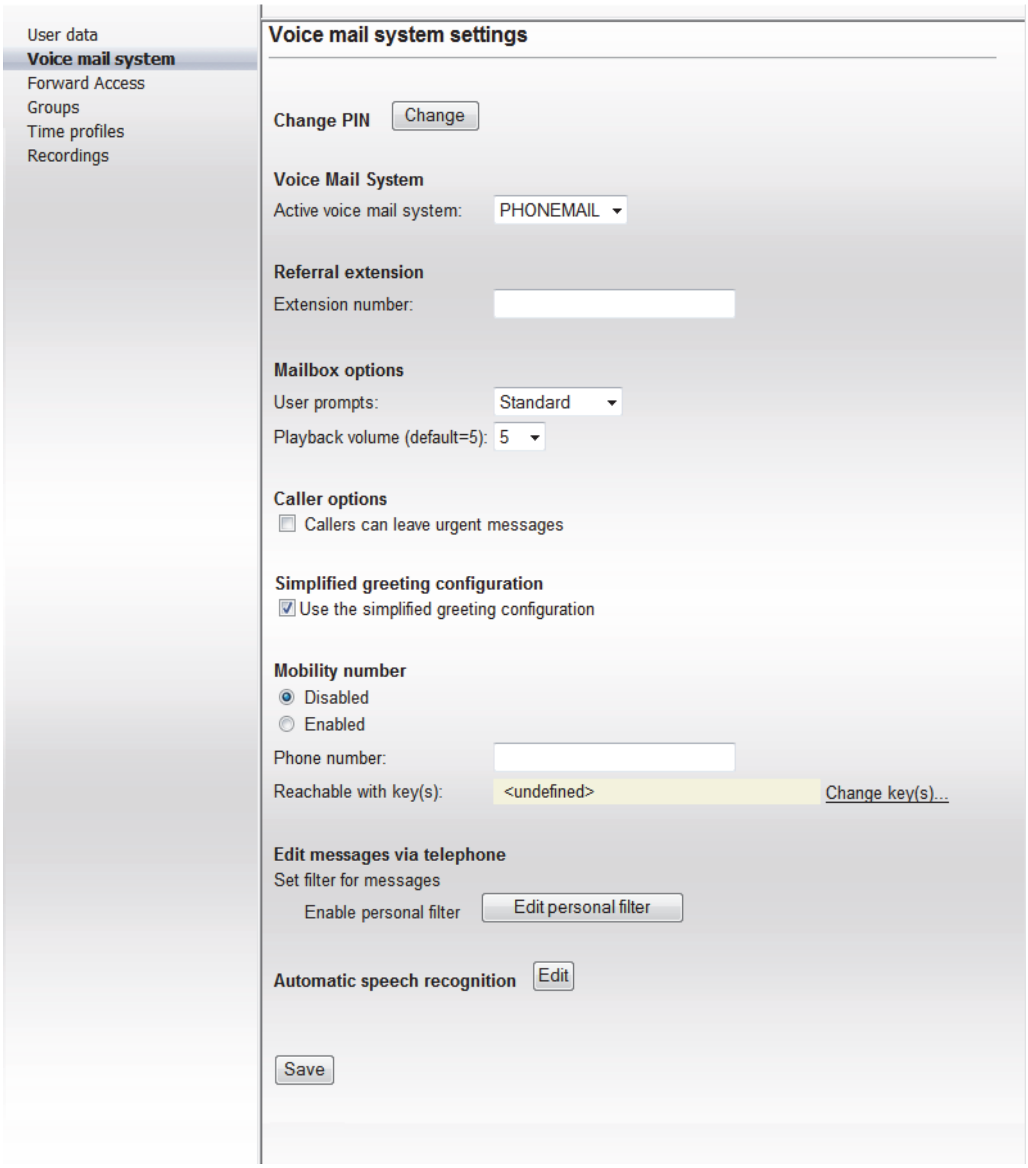
The page is updated and displayed in the set language.

8.2 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.

8.2.1 How to Change the PIN

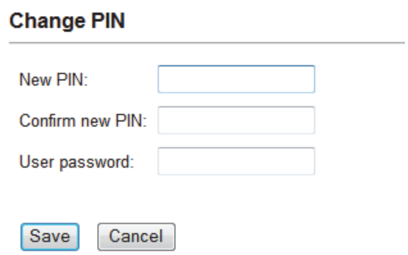
How to change the PIN for accessing your own OpenScape UC Application voicemail box:

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.

8.2.2 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.

8.2.3 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.

8.2.4 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.

8.2.5 How to Define Call-Forwarding Keys

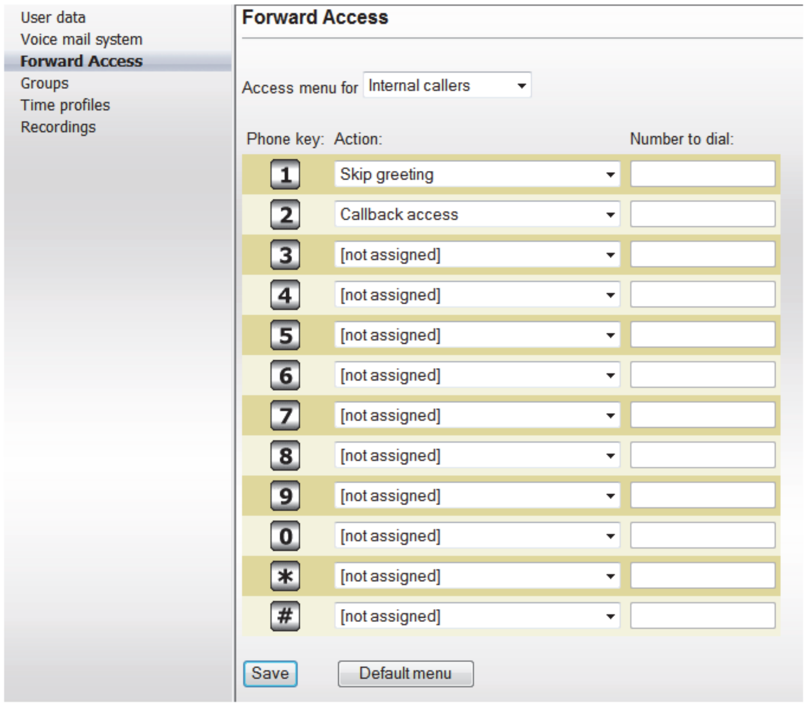
How to define a key the caller may use for triggering a forwarding:

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.

8.2.6 How to Set a Personal Message Filter

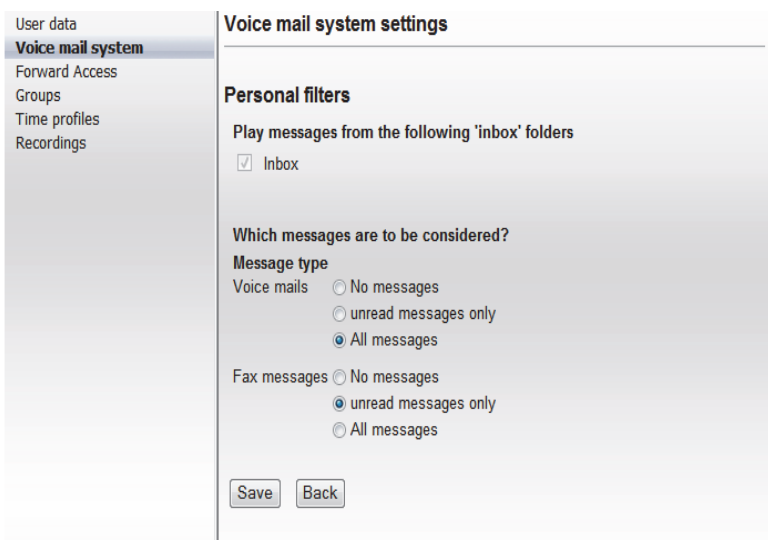
How to set your personal message filter:

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.

8.2.7 How to Set the Speech Recognition Volume

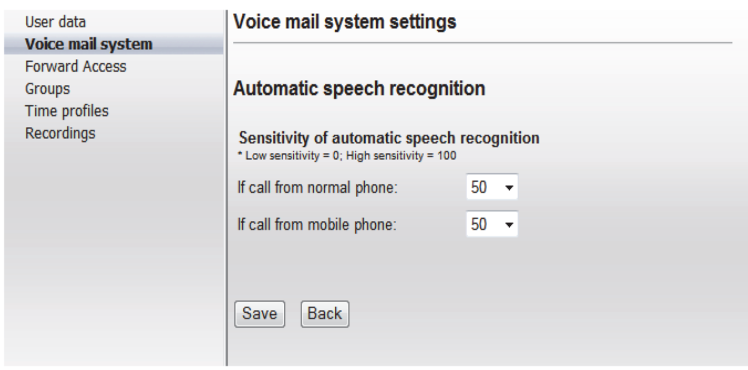
To set the speech recognition volume proceed as follows:

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.

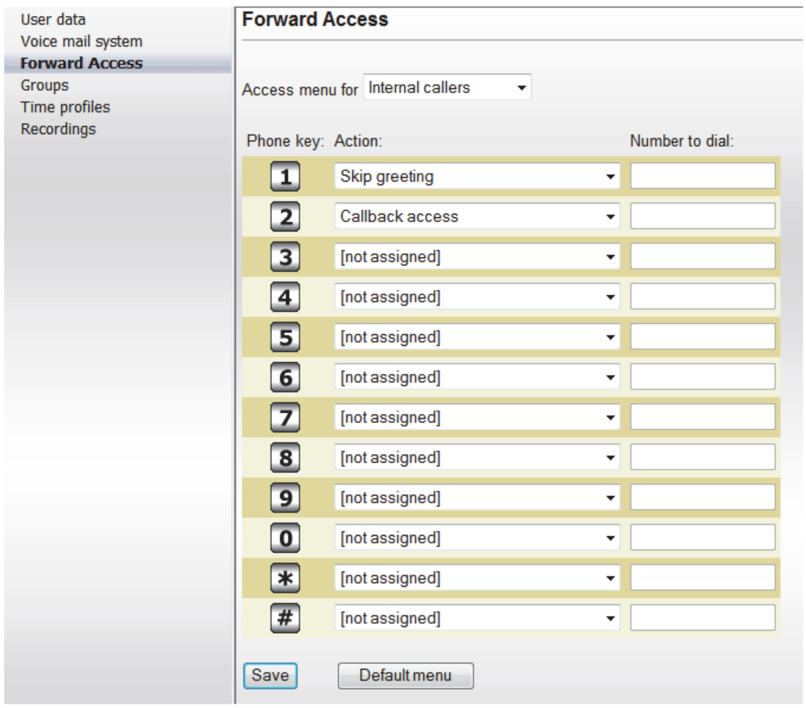
   Your settings are saved.

8.3 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 (callback 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 (answering 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.

8.3.1 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.

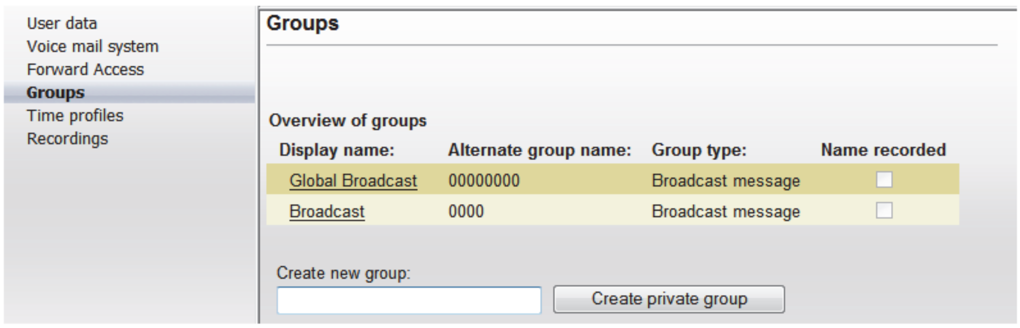
> ***NOTICE:*** Be sure to inform callers about these individual phone key(s) with appropriate greetings.

> ***NOTICE:*** The **Default menu** button resets the menu to its original appearance. Performed modifications are deleted then.

8.4 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**.

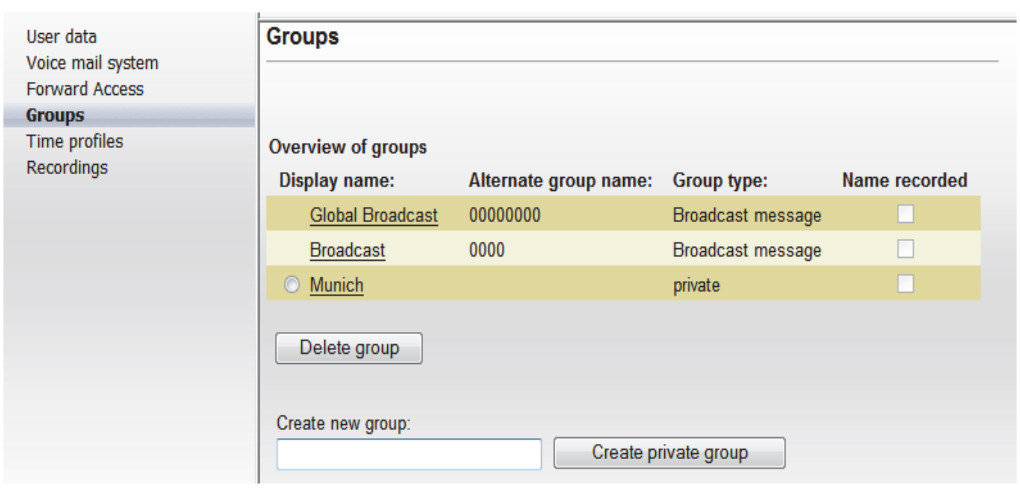


By default, this settings page displays the groups of type **Broadcast** your system administrator has pre-configured. Only users with administrator privileges can create and edit this type of group.

> ***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.

8.4.1 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.

8.4.2 How to Edit a Private Group

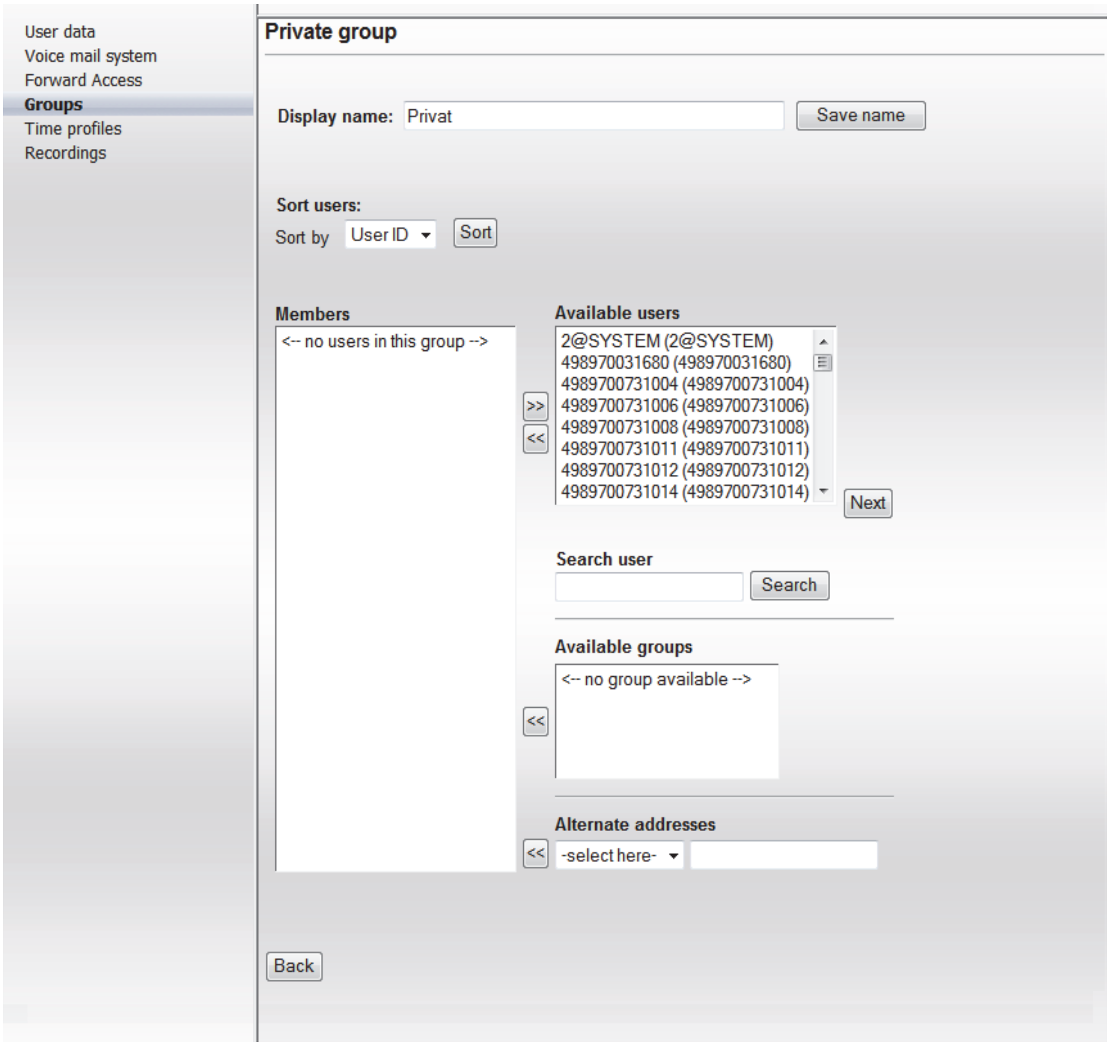
How to assign members to a private group or edit other settings:

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.



8.4.2.1 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:

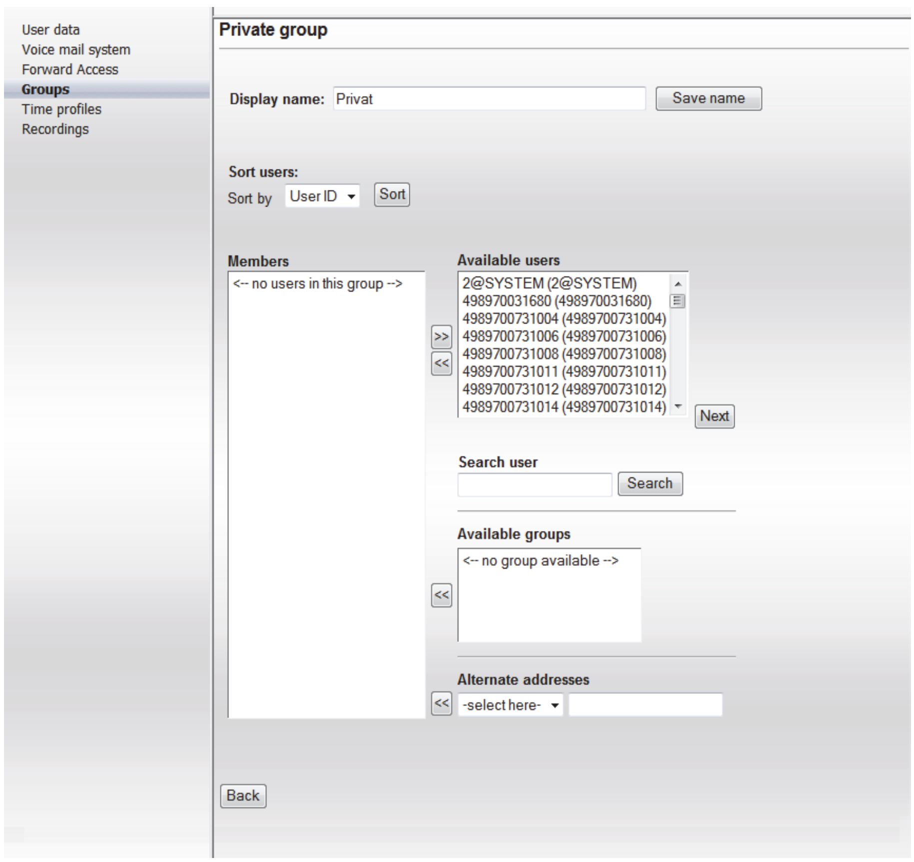
Step by Step

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.

8.4.2.2 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.

8.4.2.3 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.

8.4.3 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.

8.5 Time Profiles

With help of a time profile you can define when and with which greetings your mailbox should react to incoming calls.

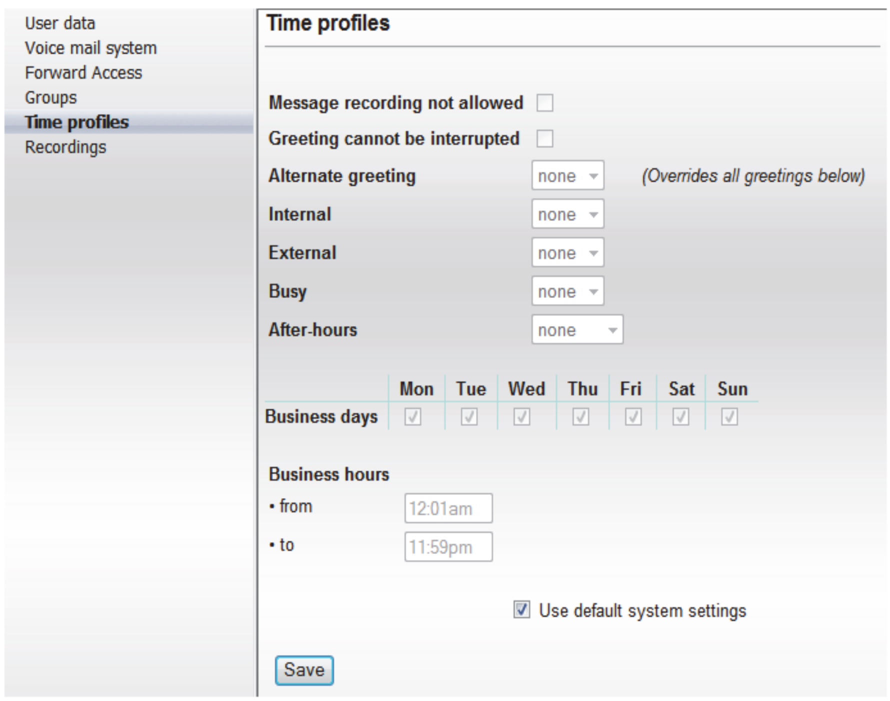
> ***NOTICE:*** The greetings that can be integrated in the time profile of this dialog must first be created via the **Recordings** feature.

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.

8.5.1 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.

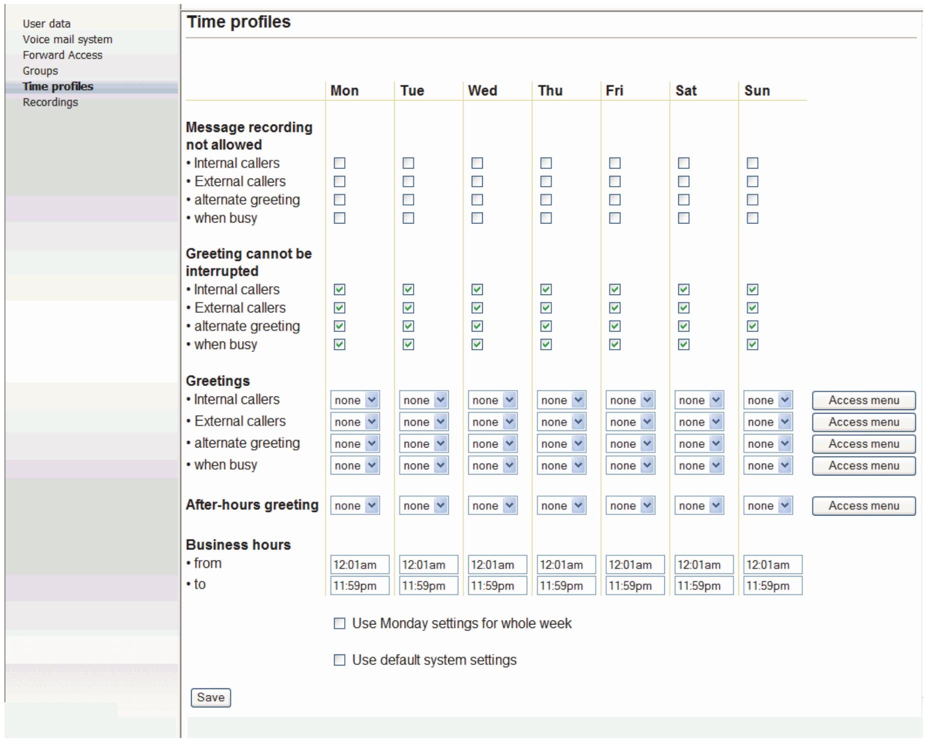
In the **Greetings** section you can assign personal greeting texts to different call types:

- **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.

8.5.2 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.

8.5.3 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.

8.5.4 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.

8.5.5 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.

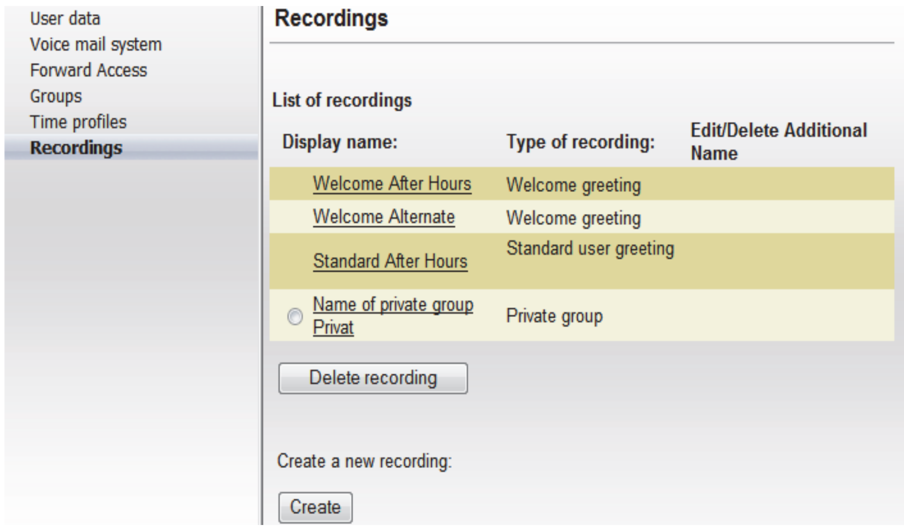
8.6 Recordings

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.

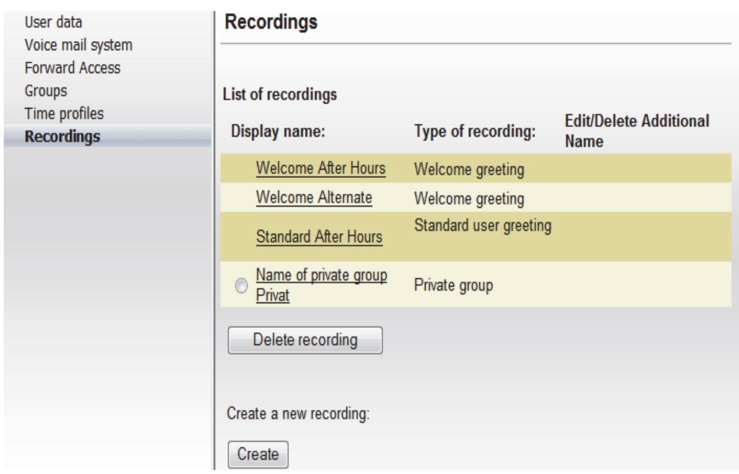
8.6.1 How to Record and Edit Greetings

How to record or modify a personal greeting:

Step by Step

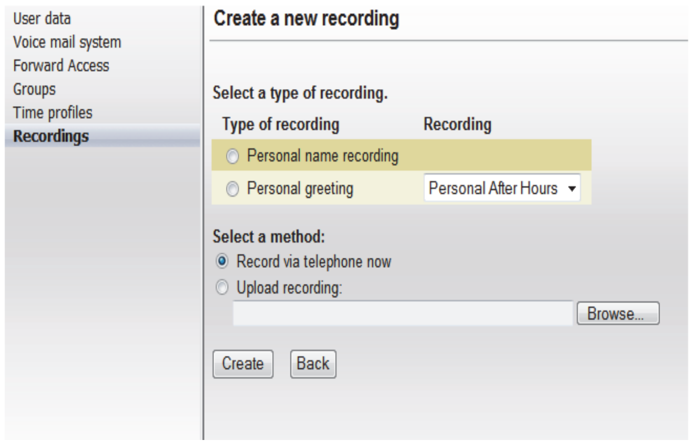
1) Open the **Recordings** settings page for the voicemail system via **menu > Voicemail > Recordings**:

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.

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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.

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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.

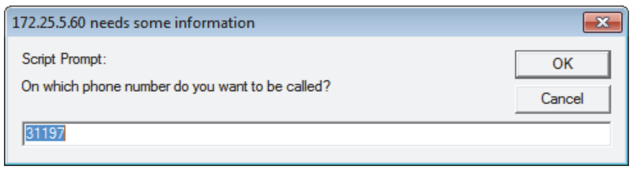
Depending on the selected method continue as described in the following.

8.6.1.1 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:

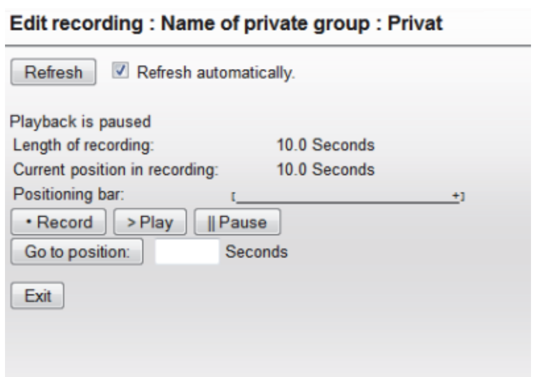
Step by Step

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.

8.6.1.2 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.

8.6.2 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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