



C4B COM FOR BUSINESS

■ XPhone **Unified Communications** 2011

XPhone Unified Communications

User manual

XPhone UC Team Panel

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This manual is based on: XPhone Unified Communications 2011, as of July 2010

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1 About XPhone UC Team Panel

What is XPhone UC Team Panel?

XPhone UC Team Panel license information see "License information".

1.1 What is XPhone UC Team Panel?

XPhone UC Team Panel combines CTI with presence management to improve employee availability. The software supports communication in teams and workgroups – even if team members work in different offices, buildings or cities. Every team member is shown in the team panel. Status indicators reflect the other team members' calling statuses, e.g. free or busy. Calls can be transferred or picked up with a click of the mouse before the call is even accepted (call deflection).

Precisely defined presence profiles tell you who is currently available, and who isn't because they're at a meeting, home sick or away on holiday. The presence profiles can be combined with call forwarding and messages for the other team members.

XPhone UC Team Panel integrates tightly with Microsoft Outlook and Lotus Notes. Appointments in the calendar functions can be automatically imported and associated with a particular presence profile.

XPhone UC Team Panel is a component of the XPhone Unified Communications product family and is based on the XPhone Server platform. The solution can be used with other XPhone Unified Communications products, including XPhone UC Commander and XPhone UC Web, for an even broader range of features.

1.2 License information

Information about your user license can be obtained here:

- a) Right-click an area of the team panel not occupied by a team key and select **Settings**.
- b) Open the **Info** tab. It will show the current software version.
- c) Click the <<License editor>> button to see your XPhone user licenses.

Note: user licenses are automatically distributed using the XPhone Server platform. You only need one license per user, even for users who control several lines in XPhone UC Team Panel. If you have questions, please contact your administrator.

1.3 About the XPhone UC Team Panel: Manual

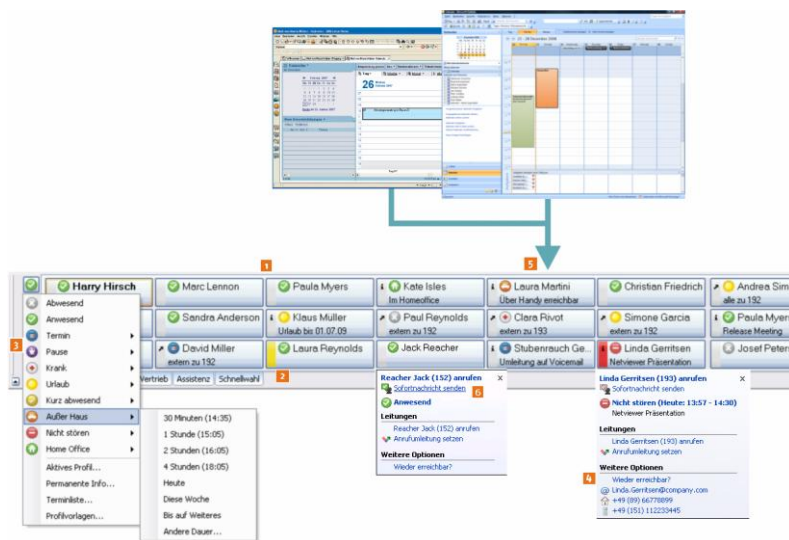
structure

This manual guides you through the functions of XPhone UC Team Panel. Individual procedures are listed step by step, enabling you to follow the instructions immediately. Specially marked hints and information provide ideas on how to best use a certain function.

Formatting

The names of functions, buttons, dialogues and menus are printed in colour enabling them to be recognised as such at all times. Icons from the user interface are indicated by <<>> where they appear in the text.

2 Overview



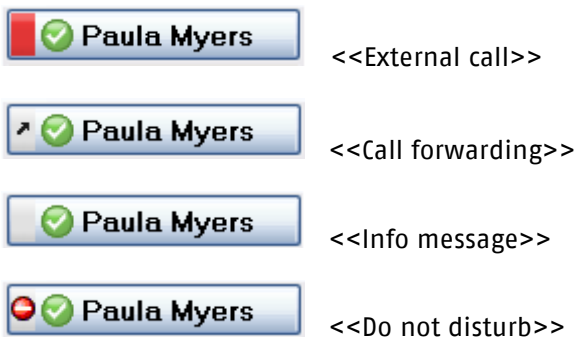
- 1 The XPhone UC Team Panel interface with telephony functions see "Making calls with XPhone UC Team Panel"
- 2 The team buttons indicate line statuses see "Identifying line statuses"
- 3 In this section, you can edit your own presence status and select a profile template see "Presence management with XPhone UC Team Panel"
- 4 XPhone UC Team Panel notifies you when the person you want to call becomes available again see "Making calls with XPhone UC Team Panel"
- 5 XPhone UC Team Panel imports appointments from your Microsoft Outlook / Lotus Notes calendar see "Importing Microsoft Outlook / Lotus Notes appointments"
- 6 See if someone can be reached by instant message, and send instant messages

2.1 Identifying line statuses

Each team member is assigned his or her own button in the team panel. Your button is always shown in bold and usually located in the upper left-hand corner. The status indicator shows the team member's current line status. It lets you check whether someone is available before you dial their number or try to transfer a call to them. If a team member has several lines (see Controlling several lines with one team button), the indicator will change no matter what line the user is calling on.

Line statuses at a glance:

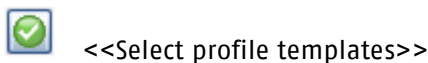




The status indicator blinks yellow (internal) or red (external) to indicate inbound calls. If your PBX supports call waiting, the button on your team key blinks yellow (internal) or red (external) in the same rhythm as a call waiting indicator.

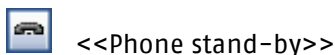
2.2 Other XPhone UC Team Panel buttons

The XPhone UC Team Panel interface contains other buttons:



Click here to manually change your presence status, edit your active profile, edit other profile templates or set up a permanent info message for other team members.

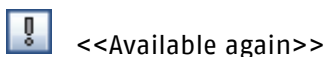
More information is available in Presence management: see "Presence management with XPhone UC Team Panel"



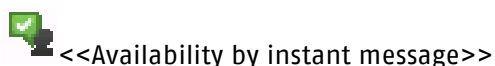
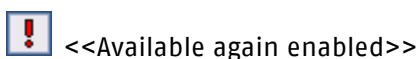
This icon changes in response to inbound calls (external or internal), and you can accept the call by clicking the icon:



The icon changes again during the call. To hang up, click the icon:



This icon is disabled if you have not enabled the **Available again** desktop message for anyone. If you have activated this function for one or more people, the icon changes the moment the desired party (or parties) is available again. More information is available here: see "Making calls with XPhone UC Team Panel"



The icon with the Send instant message see "Sending instant messages" hyperlink is shown if a team member can be reached by instant message..

8 OVERVIEW



<<Not available by instant message>>

The icon signals if a team member is not available by instant message.

3 Team keys

Selecting available keys see "Selecting team keys and speed-dialling keys"

Formatting keys see "Formatting team keys"

Tabs

Display settings

Making other settings see "Other settings"

3.1 Information about using XPhone UC Team Panel templates

Please note that your administrator may have restricted or completely disabled the configuration settings described below.

The administrator can make configuration settings for the entire team. This is where the administrator can also disable individual user settings.

3.2 Selecting team keys and speed-dialling keys

Hiding individual team keys

You can manually remove individual team keys from the team panel.

- a) Simply open the context menu by right-clicking on an area of the team panel not occupied by a team key.
- b) Select **Settings**.
- c) Select the team key you wish to delete, and press the Del key on your keyboard or select the **Delete** command from the context menu.

Note: You can add a team key you have manually removed at any time.

Adding speed-dialling keys

Besides the team keys, you can add other phone numbers (internal and external) to the team panel that you can dial with a click of the mouse (speed dial). You can set up an unlimited number of speed-dialling keys and position them anywhere in your team panel. Please note that speed-dialling keys do not display line statuses because these phone numbers are not managed by your PBX.

- a) To create a speed-dialling key, open the context menu by right-clicking in an area not occupied by team keys. You are now in configuration mode.
- b) Select **Settings** and then **Team keys**.
- c) Select **Special keys** in the display filter.
- d) Select **Speed-dialling key** in the lower part of the dialog window
- e) Drag the speed-dialling key to the position you require in your team panel.
- f) Double-click the key to edit it. Enter a name and phone number.
- g) Click **OK** when you are done.

Hint: You can transfer or deflect calls before accepting them by simply clicking a speed-dialling key. This is an easy way to forward calls to people who are not connected to the in-house PBX because

they are working in their home office.

Sorting keys by phone number and name

Since XPhone UC Team Panel is administered centrally from XPhone Server, the keys are initially displayed in a predefined order that you can change as desired.

- a) Open the context menu by right-clicking in an area of the team panel not occupied by team keys.
- b) Select **Arrange keys** and then select whether to sort the keys by phone number or name (for more information, see Renaming team keys).
- c) Another way to access this option is by clicking **Settings** and then the **Key formatting** tab in the context menu. Make sure that the **Arrangement** checkbox is activated.

Arranging keys manually

- a) Open the context menu by right-clicking in an area of the team panel not occupied by team keys and select **Settings**.
- b) You are now in configuration mode. You can now drag individual keys around within the team panel. To do this, left-click the team key and drag it to the new position. Make sure to hold down the left mouse button while dragging the key.
- c) To exit configuration mode, close the **Settings** window. The new arrangement is now active.

Finding and inserting team keys

By default, the team panel contains the keys for all the team members that the administrator has assigned to your workgroup. However, you may not wish to display all the team members in your team panel, especially in large teams. In this case, you can decide which keys to display in the team panel, and which to hide. The display filter helps you make the selection.

- a) Right-click an area of the team panel not occupied by a team key in order to open the context menu.
- b) Select **Settings** and then open the **Team keys** tab.
- c) Open the **Display filter** drop-down menu and select your preferred option. XPhone UC Team Panel "remembers" which team keys you use rarely or frequently, and can display these keys on request.
- d) The selection is shown in the lower section of the dialog. To add individual keys to your team panel from the selection, click the display name and drag it to the desired position in the team panel with your mouse (i.e., while holding down the mouse button).
- e) Close the Settings dialog to apply the changes.

Use the search function to find a particular team key.

3.3 Formatting team keys

XPhone UC Team Panel adapts readily to the user's unique needs. You can change the size of the keys, rearrange them, and rename them to suit your personal preferences.

- a) Open the context menu by right-clicking on an area of the team panel not occupied by a team key.
- b) Select **Key formatting**.
 - **Key height**: You can choose between one and two lines. One-line keys take up less space. Two-line keys display not only the key name, but also info messages, call forwarding destinations and caller information.
 - **Key width**: You can choose between:

- ☐ **Automatic: Compact** = Key size is reduced as much as possible, given the length of the key names.
- ☐ **Automatic: Optimal** = Keys are displayed so that all key names are shown in full.
- ☐ **Single** = Keys are displayed in the standard size.
- ☐ **Double** = Keys are displayed in twice the standard size.
- **Arrangement:** Enter whether you wish to sort the keys by name or phone number.
- **Fill in gaps:** Select this check box to wish to fill in gaps in your team panel.
- **Names:** Enter how you want the keys in your team panel to be named, for example, user name (the name stored in the PBX system), last name, first name, etc.
- **Manually renaming team keys:** You can also give team keys your own individual names.
 - a) Open the context menu by right-clicking on an area of the team panel not occupied by a team key.
 - b) Select **Settings**. You are now in configuration mode.
 - c) Double-click the team key to open an editing screen where you can enter the desired name.
 - d) Select **OK** to confirm your choice and exit configuration mode by closing the Settings window.
- a) Select **Format this tab** or **Format all tabs** to apply the settings. More information is available here see "Using tabs"

Note: Make sure that the **Overwrite manually changed names** checkbox is not activated. If it is activated, your configuration will be reset whenever the administrator restarts XPhone Server.

3.4 Using tabs

If you are in several teams or in a team with many members, you can divide your team panel into several tabs, such as Sales South, Sales East, Sales North, etc. You can display a particular team key in several tabs (if you always wish to see the secretary's key, for example).

Creating tabs

- a) Open the context menu by right-clicking on an area of the team panel not occupied by a team key.
- b) Select **Settings** and then **Tabs**.
- c) To create a new tab, click **New**. You now see a second team panel view.
- d) Select the new tab in the window and click **Rename** to give the tab a name.
- e) Tabs are shown at the bottom by default. You can change the position of the tab switch-over in the **Position of the tab switch-over** drop-down menu.
- f) Use the arrow keys to change the order in which the tabs are displayed.

Deleting tabs

- a) Open the context menu by right-clicking on an area of the team panel not occupied by a team key.
- b) Select **Settings** and then **Tabs**.
- c) Select the tab in the dialog window and click **Delete**.
- d) Exit the dialog by selecting **Close**. The tab has been deleted.

Assigning team keys to a tab

- a) Use the tab switch-over to select the tab you wish to add a team key or speed-dialling key to.
- b) Open the context menu by right-clicking on an area of the team panel not occupied by a team key.
- c) Select Team keys and pick the team key that you wish to add to the current tab.

- d) Click and hold down the mouse button to drag the team key to the position you require in the team panel.
- e) To add a speed-dialling key, select Special keys in the display filter. Speed-dialling key is displayed in the dialog window.
- f) Click and hold down the mouse button to drag the speed-dialling key to the position you require. Double-click the speed-dialling key to start the editing mode.

3.5 Display settings

You can modify the XPhone UC Team Panel display settings to suit your individual tastes.

- a) Right-click an area outside the team panel in order to open the context menu.
- b) Select **Settings** and then **Display**.

Always/automatically showing the team toolbar

- a) Right-click an area of the team panel not occupied by a team key in order to open the context menu.
- b) Select **Settings** and then **Display**.
- c) In **Team toolbar**, you can decide whether the team panel should always be on top, or should only appear when you place the mouse pointer on the top or side edge of the screen.
- d) Click **Close** to confirm your settings.

Hint: To see how to change the animated showing/hiding of the team panel, read **Configuring animation and effects** below.

Team panel's response to inbound calls

- a) Right-click an area of the team panel not occupied by a team key in order to open the context menu.
- b) Select **Settings** and then **Display**.
- c) In **Show desktop info for calls for me**, you can decide whether to display a desktop info (small window) on your screen when you receive calls on call waiting.
- d) Click **Close** to confirm your settings.
- e) Click the desktop info to display the team toolbar.

Team panel position

There are essentially two ways to position the team panel on your screen: You can

- dock the team panel on the top, bottom, left or right edge of the screen, or
 - position the team panel in a separate window anywhere on your screen. In this case, the team panel cannot be automatically hidden and shown (see above). Instead, the window always remains on top.
- a) To position the team panel, proceed as follows:
 - b) Place the cursor on the vertical line (if the team panel is on the upper or lower screen border) or horizontal line (if the team panel is on the side of the screen) at the edge of the team panel; the cursor will change its appearance.
 - c) Click and hold down the mouse button to drag the team panel to the position you require.

Hint: Click on the small triangular arrow on the left edge of the team panel to manually hide the team panel as needed.

Signal settings for calls on your own line(s)

You can signal incoming calls visually on your computer screen in addition to your telephone ringing. You may want to do this if your PBX supports call waiting (incoming calls are signalled while you are still on the phone), you use several telephone lines or you use a headset that is directly connected to your computer. When activated, this feature shows a small window signalling the new call. This window is called a desktop info, and you can accept the call by clicking it.

- a) Right-click an area of the team panel not occupied by a team key in order to open the context menu.
- b) Select **Settings** and then **Display**.
- c) In **For calls for me**, activate the **When ringing** and/or **For call waiting** checkboxes
- d) Click Close to confirm your selection.

Signal settings for calls for other team members

- a) You can also be notified of calls to other team members. This may be a good idea if you wish to pick up calls for coworkers who are not at their desk at the moment. If you are in a large team, you can break down see "Using tabs" this option into individual tabs so you don't constantly see signals for new calls. You have two options which you can combine:
 - A visual signal: the desktop info
 - An audio signal
- a) Go to **For calls for team members** and select the tab containing the team members whose calls you wish to have signalled.
- b) Click **Edit** to specify when the signals should be triggered. A new dialog opens.
- c) In **Notification for team members**, set the conditions that have to be met in order to trigger the signal, such as a call on **call waiting**.
- d) Use the time slider to specify the delay in seconds before the signal is triggered.
- e) In **By**, you indicate whether you want a visual (desktop info) and/or an audio signal. If you wish to use your own audio signals instead of the default XPhone UC Team Panel audio signal (DingLing), you can upload your signals (wav files) using the **Browse** command. Click the play icon next to the drop-down menu to hear the selected signal tone.
- f) If you've configured audio signals for several tabs, you can decide which tab takes precedence by setting its priority to **High**. Now, if you receive calls for several team members who are assigned to different tabs, the system automatically uses the signalling settings from the highest-priority tab.
- g) Select **OK** to confirm your settings and exit the Settings dialog by selecting **Close**.

Hint: Select different signal tones to signal calls for team members in different tabs. This way, you will know whose phone is ringing when the desktop info is deactivated and only the audio signal is active. We also recommend creating a separate tab for team members whose calls should be given top priority.

Configuring animation and effects

- a) If you have activated **Show and hide team toolbar automatically** (see above), you can also configure the team panel to either roll out into the screen or appear in a pop-up. Simply click the **Effects options** in the Display dialog, and specify whether you want the team toolbar to be shown and hidden with animation and whether you want to use transparency and cross-fading effects.
- b) In **Design**, you can specify a particular look for the team panel, such as WinXP Royal. If you select **Browse** in the drop-down menu, you can download additional skins (msstyles files).
- c) In **Desktop info window**, you can set the transparency and duration of the desktop info (see above).

- d) You can re-enable disabled messages in **Enable messages**.

Hint: We recommend turning off transparency and cross-fading effects in a terminal/server environment because the animation can impair performance.

3.6 Other settings

- a) Right-click an area outside the team panel in order to open the context menu.
- b) Select **Settings** and then **Other**.

Automatically starting XPhone UC Team Panel

Activate the **Start automatically at system start-up** checkbox if you want XPhone UC Team Panel to start automatically when your PC boots up.

Identifying callers with XPhone UC Commander

If you are also using XPhone UC Commander, XPhone UC Team Panel uses this program's database connection to identify the caller and shows you the caller data for all callers as a tooltip on your team key. This only works if the following requirements are met:

- XPhone UC Commander is installed on your PC with a valid license.
- There is a matching contact data record in the databases linked with XPhone UC Commander.
- The **Use XPhone UC Commander for caller search** option must be activated.

Picking up calls with automatic call acceptance

XPhone UC Team Panel lets you pick up calls for other team members with a single click of your mouse. Activate the **Pick up call with automatic call acceptance** checkbox to be immediately connected to the caller when you click the team member's team key. If this option is disabled, you have to accept the call manually or by clicking <<Accept call>>.

Hint: This is especially useful if you use a headset that is connected directly to your computer.

ACD manager support



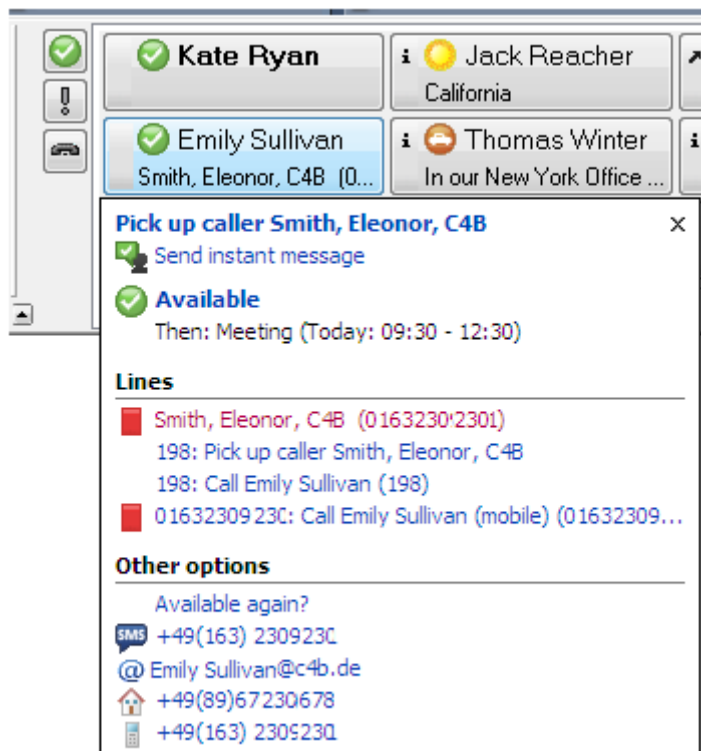
XPhone UC Team Panel supports ACD (automatic call distribution). To show the ACD button (see below), enable **Display options for the ACD manager** and then configure the settings accordingly.

Note to administrators: You can only use this function if you have set the parameter **EnableAgent=1** in the advanced settings for the user's main line, located in Settings/CTI/Lines in the server settings.

4 Making calls with XPhone UC Team Panel

Internal calls

- Click a team key to call the associated team member.
- If the team member has several lines, but you don't want to use the main line, place your mouse pointer on the team member's team key. You will see a tooltip window containing all the lines. Click the line you wish to dial.

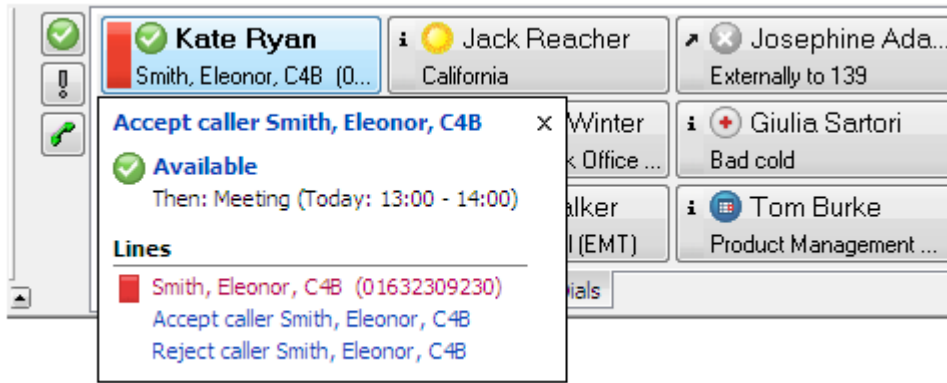


Calling with speed-dialling keys

Click a speed-dialling key to start see "Selecting team keys and speed-dialling keys" a call.

Accepting / rejecting calls

- When your phone rings, you can accept the caller by clicking <<Accept/hang up>>. The icon turns red once you start the call.
- You can also accept a call by clicking your own team key.
- Or, you can position your mouse on your team key. A tool tip appears with various options, such as accepting or rejecting the call. Click the command for the action you wish to perform.



Deflecting calls

If you are unable or unwilling to accept a call, you can deflect it to someone else by clicking his or her team key. The caller will not realize what you have done.

Hint: This is particularly useful for PBXs that support call waiting. If a call comes in while you are on the phone, you can either put the current call on hold or forward the new caller to a coworker or your voicemail.

Transferring calls

- To transfer a caller to another team member, simply click his or her team key. The caller is automatically put on hold.
- If you hang up, the caller is transferred immediately.

If you wait for your coworker to answer the phone, caller will remain on hold until you hang up.

Hanging up

<<Accept/hang up>> turns red when you accept a call.
You hang up by clicking this icon.

Identifying callers

If a member of the team calls your line, you see a tooltip identifying the caller. Provided that you have selected two-line keys, your team key also displays the caller's name.

In cases where you are also using XPhone UC Commander, XPhone UC Team Panel uses this program's database connection to identify the caller and shows you the caller data for external callers as a tooltip on your team key. This only works if the following requirements are met:

- XPhone UC Commander is installed on your PC with a valid license.
- There is a matching contact data record in the databases linked with XPhone UC Commander. Please read the XPhone UC Commander User Manual for more information.

Call forwarding and Do not disturb

Position your mouse on your team key. A tool tip containing the available options opens.

Select **Set call forwarding**.

Decide whether you want to forward all / internal / external calls and enter the destination phone

number (internal extension). XPhone UC Team Panel remembers previous destination numbers, and lets you select them in a drop-down menu.

If you don't want to be disturbed, you can enable the **Do not disturb** option. Incoming callers then hear a busy signal even though your line is free. Other team members see "Identifying line statuses" in the team panel that Do not disturb is enabled.

Note: If you have several lines, you can set call forwarding and do not disturb separately for each line.

Notifications when caller becomes available

Do you need to talk to a team member who is on the phone or away from her desk? XPhone UC Team Panel can notify you once the caller is available again – i.e., when her line is free or her presence status changes to <<Available>>.

- a) Place the mouse on the team member's team key until the dialog appears.
- b) Click Available again. The team key now displays a gray exclamation mark. Once the team member becomes available again, a desktop info appears and the exclamation mark turns red.



You can customize see "Display settings" the desktop info in the Settings dialog.

5 Presence management with XPhone UC Team Panel

XPhone UC Team Panel shows you immediately when and whether other team members are available: There are profile templates for every available presence status, telling you who is unavailable, who is in a meeting (and how long it's going to last), who is on holiday and who will be right back. More on profile templates

XPhone UC Team Panel comes with nine profile templates by default. You can modify these templates or create additional ones. You can also set up rules to automatically activate your profile templates when certain conditions are met. More on configuring profile templates see "Configuring profile templates"

If you enter your appointments in Microsoft Outlook or Lotus Notes, you can synchronize XPhone UC Team Panel with your calendar. Your appointments are then automatically imported to XPhone UC Team Panel. This can be done in all cases or only in special cases. More on Outlook / Notes synchronization see "Importing Microsoft Outlook / Lotus Notes appointments"

5.1 Information on configuration with presence management templates

Please note that your administrator may have restricted the configuration settings described below.

The administrator can configure the calendar synchronization and the profile templates that are available to the user, which means that users can automatically get settings from XPhone Server. It is also possible to disable individual user settings.

5.2 Using profile templates

XPhone UC Team Panel comes with nine default profile templates for indicating your current presence status:

-  <<Available>>
-  <<Unavailable>>
-  <<Meeting>>
-  <<Be right back>>
-  <<Break>>
-  <<Off Sick>>
-  <<On Holiday>>
-  <<Out of Office>>
-  <<Do Not Disturb>>
-  <<Home Office>>

Each of these profiles can be supplemented by additional time information, e.g. 30 minutes or 2 hours.

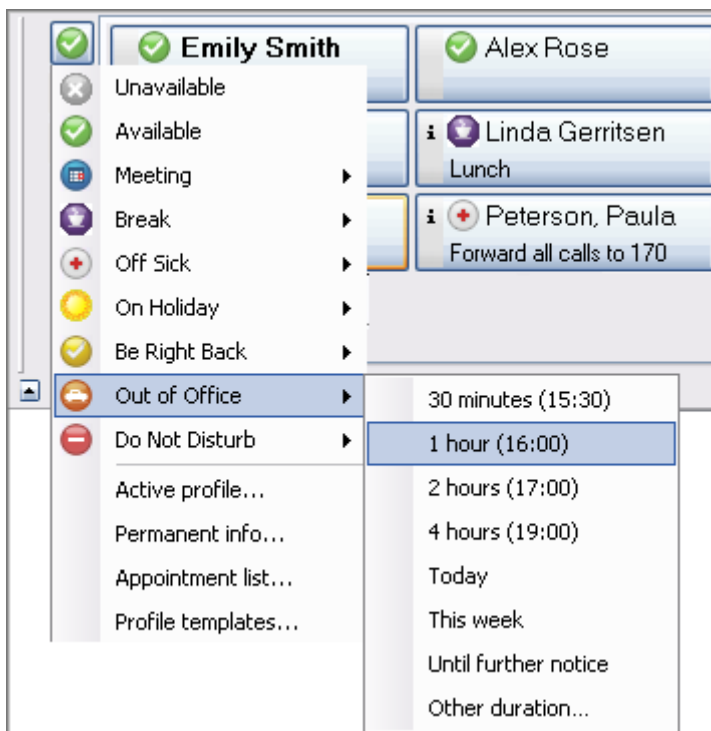
XPhone UC Team Panel automatically returns to its original state when this period ends.

All the members of your team(s) can see your presence status and the selected time period.

Note: Your administrator can restrict the available profile templates and time periods in the central settings.

Select profile

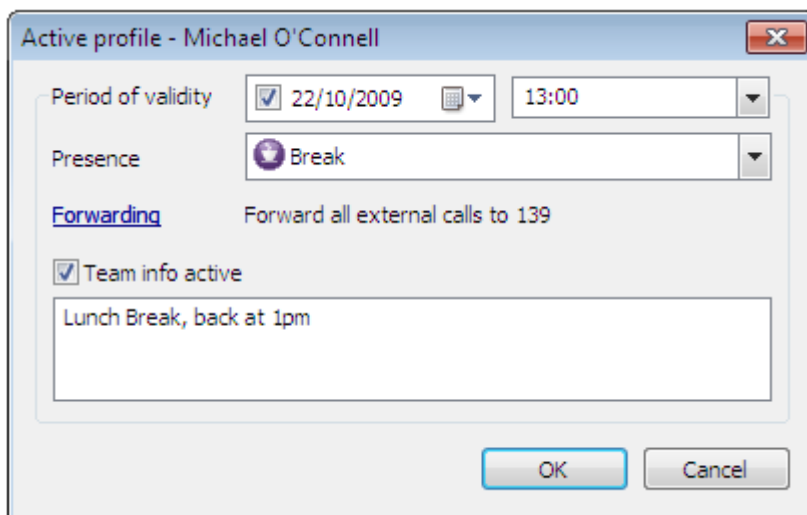
- a) Click <<Select profile template>> on the left or uppermost edge of the team panel or click the presence section in the XPhone UC Commander to display a selection list with all available templates.
- b) Select a profile and specify a time period. XPhone UC Team Panel automatically returns to its original state when this period ends.
- c) All the members of your team(s) can see your presence status and the selected time period.



Presence / Team info

You can also add call forwarding and/or team messages to the profile templates. This is useful if you are forwarding all your calls to another team member, but still want certain, special calls put through to you anyway.

- a) Click <<Select profile template>> and select **Edit presence / team info**. Your current profile is activated by default. You can also select a different presence status.



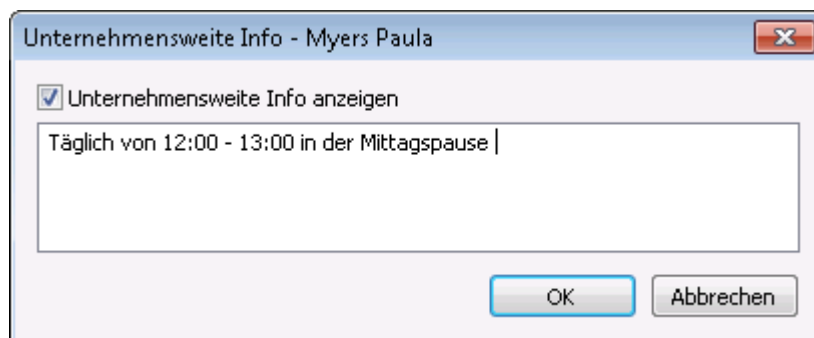
- b) If necessary, enter the period of validity.
- c) You can also set up call forwarding and save a team info as well. Your team members will see this message in the XPhone UC Team Panel interface for the entire validity period of your current presence profile. Press **OK** to confirm. These changes are not saved permanently in the profile template – they only apply for the current presence status.

Note: If you select Do not change forwarding in Call forwarding, your calls will continue to be forwarded after your profile has changed back. Select one of the other call forwarding options if you only want your calls to be forwarded while the current presence profile is active.

Edit company-wide info

You can set up messages for other team members that are not controlled by profile templates.

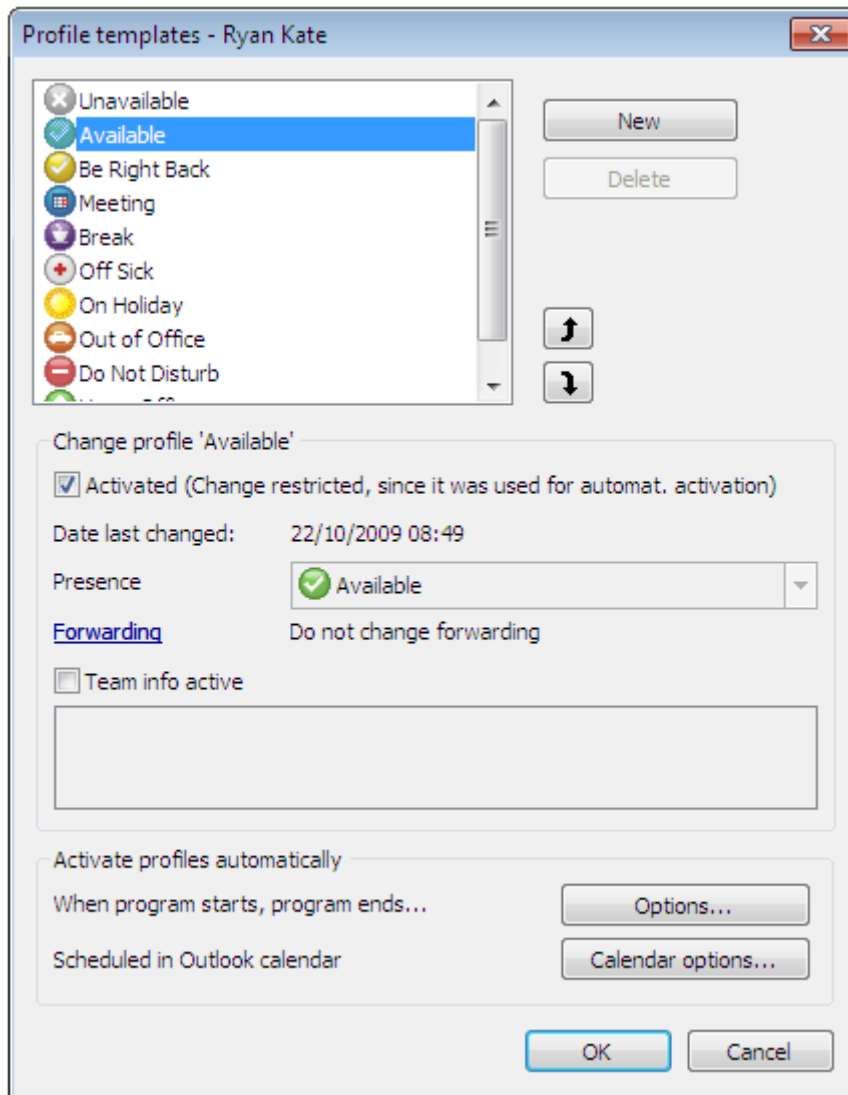
- a) Open the template dialogue by clicking <<Select profile templates>> and select **Edit company-wide info**.
- b) Activate the checkbox, enter your text and select **OK** to confirm.



5.3 Configuring profile templates

Profile templates can be customized by automatically associating them with call forwarding and/or team infos, for instance. New profile templates can be created just as easily.

Note: You can change the behaviour of your presence templates either permanently in this dialogue, or only temporarily in Edit active profile.



Resorting profile templates

- Click <<Select profile template>> and select **Profile templates**.
- Use the arrow keys to change the order in which the profile templates are displayed.
- Remember to confirm your changes by clicking **OK** before exiting the dialogue.

Creating new profile templates

You can create an unlimited number of new profile templates.

- First select a default template on which to base the new template, and then click New. This will not delete the default template.
- Give your new profile template a name and define it more precisely as described below.

Automatically controlling call forwarding / team infos with profile templates

XPhone UC Team Panel helps you improve your availability in many different ways: profile templates can be linked with call forwarding and team infos.

Profile templates can be automatically activated depending on certain user behaviour.

Profile templates are controlled via the appointments in your Microsoft Outlook or Lotus Notes calendar.

Option 1: Linking profile templates to call forwarding and/or team infos

You may want to link certain profile templates to call forwarding and/or a message.

Example:

If you don't want to be disturbed, you can have a colleague take all your calls. You simply associate the <<Do Not Disturb>> profile with call forwarding to your colleague's phone.

- Open the template dialogue by clicking <<Select profile template>> and select **Profile templates**.
- Now select the **Do Not Disturb** profile in the Profile Templates dialogue.
- Click **Call forwarding** and configure the call forwarding.
- You can also save a message to be shown to colleagues when you don't want to be disturbed.
- Confirm by clicking **OK**.

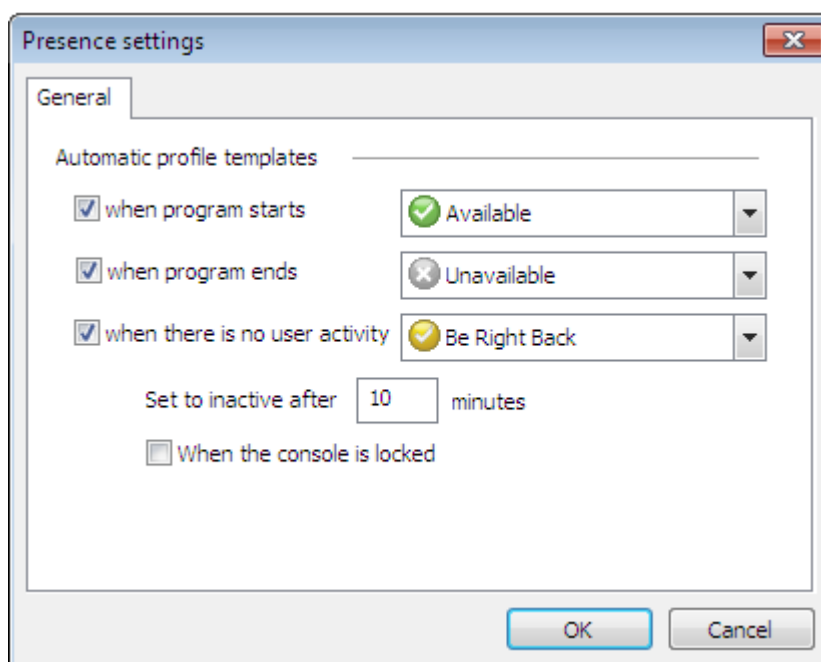
Option 2: Activating profile templates automatically

You can simplify things by configuring your profile templates (with call forwarding and/or team infos) to activate automatically whenever certain conditions are met.

Example:

You want call forwarding to your voicemail box whenever you shut down your PC and leave the office. Then, when you come to the office in the morning and boot up your PC, you want call forwarding to turn off again automatically. You want the call forwarding to voicemail to be in place even when you're away from the office for a longer period of time.

- Open the template dialogue by clicking <<Select profile template>> and select **Profile templates**.
- Go to **Activate profiles automatically**, and click **Options** in When program starts, when program ends....
- Activate the **When program starts**, **When program ends** and **When there is no user activity** checkboxes and specify when to set your status to inactive.



Note: XPhone UC Team Panel judges user activity based on computer use. If you do not use your keyboard or mouse for a certain period of time with the computer on, the software will assume that you have left your desk for a moment or are in a discussion.

Option 3: Activating profile templates scheduled in calendar sync:

Profile templates can also be automatically activated by appointments in your groupware calendar. see "Importing Microsoft Outlook / Lotus Notes appointments" This can be activated via the Outlook/Notes calendar or via the calendar sync between XPhone UC Server and Microsoft Exchange Server without requiring a client to run.

5.4 Importing Microsoft Outlook / Lotus Notes appointments

The administrator can choose between two methods of calendar synchronization.

- Local calendar sync using Outlook and Notes Client
- Central calendar sync between XPhone UC Server and Microsoft Exchange Server

This setting cannot be configured on the client.

Note for Lotus Notes: The current version of XPhone UC Team Panel does not automatically synchronize with the Notes calendar. Instead, you have to manually activate the synchronization button in the appointment list (can be accessed in the presence template selection menu) whenever you set or change a appointment. A future version of XPhone UC Team Panel will support automatic synchronization.

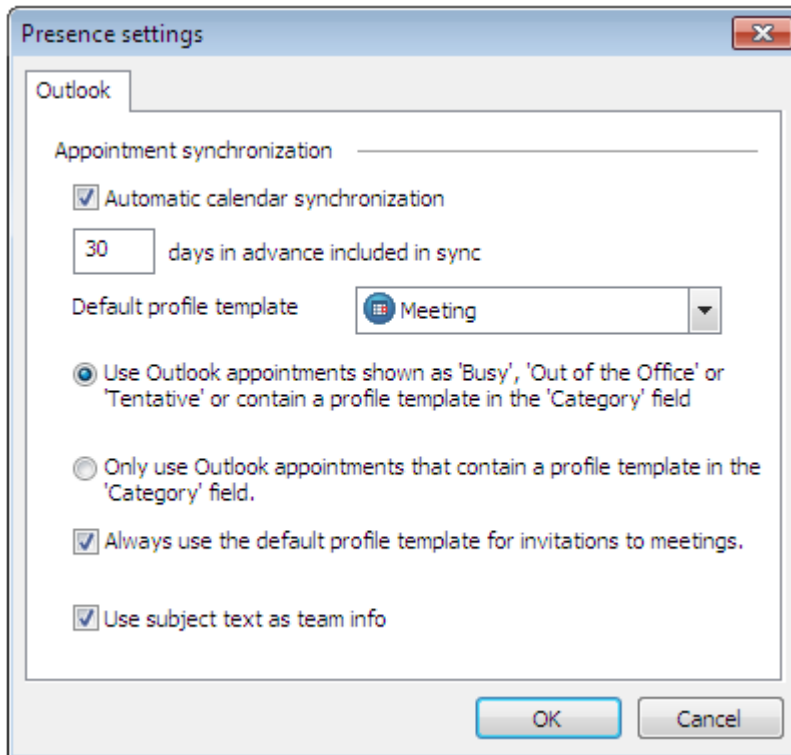
If you enter appointments in your Microsoft Outlook or Lotus Notes calendar, you can also automatically control profile templates with call forwarding and/or team infos. XPhone UC Team Panel automatically synchronizes with your calendar and imports appointments to your XPhone UC Team Panel interface according to your preferences.

XPhone UC Team Panel activates the appropriate profile template when your appointment begins. And, if you have configured the profile template with call forwarding and/or a team info, both are automatically activated. As soon as your appointment is over, XPhone UC Team Panel automatically resets the settings.

Activating appointment synchronization

- a) Click <<Select profile template>> to open the template dialogue.
- b) Select **Profile templates**
- c) Click **Calendar options** under **Scheduled in Outlook / Notes calendar** in the **Activate profiles automatically** section.
- d) Then activate the **Automatic calendar synchronization** checkbox and specify how many days in advance you want XPhone UC Team Panel to synchronize your appointments. XPhone UC Team Panel also recognizes and imports new appointments shortly after they have been entered.
- e) Select the profile template to be activated when XPhone UC Team Panel imports an Outlook / Notes appointment.
- f) Decide whether you want to import all appointments in your calendar or whether only appointments are to be shown which you have assigned to a certain category when entering in Outlook / Notes.
- g) Next, decide what you want XPhone UC Team Panel to do if the meetings weren't created by you, but were generated when you accepted someone else's meeting request.

- h) Specify whether you want XPhone UC Team Panel to import the text from the subject line in your appointment entry. If you don't activate this option, XPhone UC Team Panel discreetly indicates that you are away, showing only the text entered in the profile template. If the option is activated, every team member will be able to read the subject line.



Selecting categories in Microsoft Outlook / Lotus Notes

If you have selected the "Only use Outlook/Notes appointments that contain a profile template in the 'Category' field" option, XPhone UC Team Panel only shows appointments to team members if they are assigned to a certain category. When XPhone UC Team Panel is installed, it automatically integrates new categories in your groupware client's selection list in the following format: @xxx, e.g. @Out of Office.

Tip: Set the Meeting profile template as the default profile for your appointments, and configure call forwarding for it. That way, all your calls will be forwarded whenever you have an appointment without requiring any intervention on your part.

Viewing appointment lists

To see a list of all the upcoming appointments imported to XPhone UC Team Panel, click <<Select profile template>> and then select the **Show appointment list** option. The appointment list contains a summary of the appointments imported from the Groupware calendar system and which appointments are still active. Appointments can be deleted permanently or activated/deactivated temporarily here.

Appointment lists are useful if you wish to view, delete or activate appointments for another team member (and you have the permissions to do so).

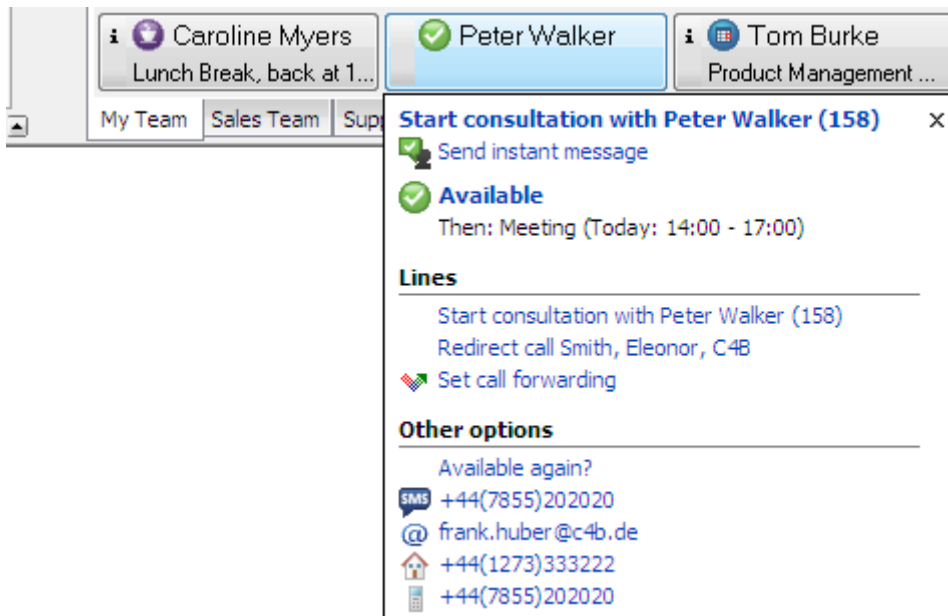
Please note that when the software re-synchronizes with Outlook or Notes, the inactive appointments are not overwritten, since this could mistakenly re-activate them. This function is used when you do not want certain Outlook or Notes appointments used in presence management. If an appointment has been saved by a representative, this is also visible in the appointments list.

6 Sending instant messages

XPhone UC Team Panel enables you to contact team members by instant message.

This is particularly useful whenever you are on the phone and need to get some information from another colleague as quickly as possible. With XPhone UC Team Panel, all you have to do is click <<Send instant message>> in your colleague's team key actions, and you can get the information you need without having to make a consultation call.

Sending an instant message



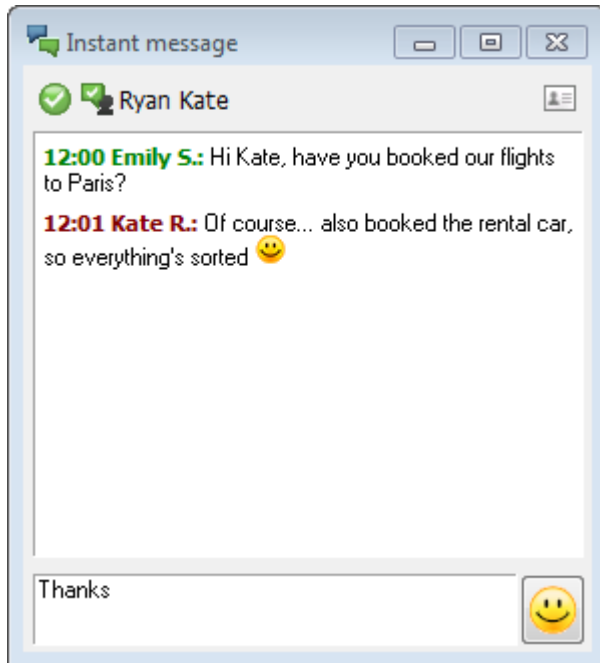
- Move the mouse pointer onto the team buttons of the colleague to whom you wish to send an instant message.
- Check whether he can receive instant messages.
- Click <<Send an instant message>>. A new window opens for instant messages.
- Type your message in the editing area of the message window and press the Enter key to send the instant message.

The text you have sent appears in the message window.

Receive instant messages

If a colleague sends you an instant message, a window containing his/her message opens automatically.

The contents of the message window is deleted as soon as you close XPhone UC Team Panel.



Availability and presence

Instant messages can only be sent when XPhone UC Team Panel is started by both the sender and the recipient.

Move the mouse pointer over the team keys. You can only send instant messages if the IM icon is green.

The icon also changes in the open message window if someone's instant messaging availability changes. The presence indicator icon changes as well.

Info on parallel use of XPhone UC Commander.

If XPhone UC Team Panel is installed parallel to XPhone UC Commander, the Commander must be started in order to send instant messages.

7 Belonging to more than one team

A user can be assigned to two or more teams, if needed. The lines of all the other team members are displayed cumulatively in the team panel.

8 Accessing other team keys

Since there are also personal hierarchies within teams, the XPhone UC Team Panel authorization scheme supports various rights for accessing other users' lines. Rights are issued by the administrator who configured the team on XPhone Server. There are different functions within a team. The rights for accessing other users' lines are always issued in one direction. This means that a user can have more access rights for a coworker's line than the coworker has for his line. For example, a team assistant can set up call forwarding for other users who do not have the right to set call forwarding for the assistant. The authorization scheme has three different team functions, each with their own level of access rights:

- Team employee
- Team leader
- Team assistant

For a detailed list of access rights regarding other team members, see the Annex.

Team employee

Team employees have the same access rights as each other, e.g. displaying the line status or the call forwarding destination. They have limited authorization for accessing the lines of team assistants and the team leaders.

Team leaders have special protection within a workgroup. This limits access to their lines by team employees, whereas the team leader's access rights are not affected by this restriction. On the other hand, team leaders have only limited rights when it comes to other team leaders in the same workgroup.

Team assistant

Team assistants essentially fill in for all team employees and can configure call forwarding, team messages and company messages on behalf of other members of the team. Team assistants can thus configure call forwarding and presence messages for team members who are sick or away on unexpectedly long field assignments. A team can have more than one team assistant.

9 Resetting XPhone UC Team Panel settings

Settings --> Troubleshooting allows you to reset your team settings as needed.

You can choose whether to reset just the tabs, or all of the settings.

Note: Please note that you have to restart XPhone UC Team Panel in order to enable the reset settings.