Documentation

OpenScape UC Application V6
OpenScape Web Client

User Guide

A31003-S5060-U101-4-7619

Siemens Enterprise Communications
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History of Changes

Date	Changes	Reason
2011-03-11	Creation	
2011-12-05	REMOVED: The “Request Web Conference” feature is not supported. You cannot expand a call and consultation call with a Web Collaboration session.	CQ00190157
2012-02-13	ADDED: In case of a HiPath 4000 connection you cannot configure any **Named Device Lists** or use them as preferred device. In case of a HiPath 4000 connection the ring tone is switched to the voicemail box after the ring time set for the device has elapsed.	CQ00197506
2012-03-15	ADDED: Restrictions on configuring a preferred device by OpenScape UC Application users who are also members of a Multi-Line Hunt Group (MLHG).	CQ00199762

1 About this Manual

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

1.1 Target Group of this Manual

This manual addresses:

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

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

1.2 Contents of this Manual

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

The information is structured as follows:

Chapter 1: About this Manual

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

Chapter 2: Operation Reference

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

Chapter 3: General Main Menu Settings

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

Chapter 4: Communicating with Contacts

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

Chapter 5: Step-by-Step

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

Chapter 6: Rule interpreter - Routing Calls via Rules

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

Chapter 7: Voicemail Settings

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

1.3 Representation Conventions

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

1.3.1 Formats and Display Forms

In the manual on hand the following conventions apply:

Purpose	Appearance	Example
Product and company names	*Italic*	*OpenScape UC Application*
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, e. g. `Courier`	`c:\Program Files\...` or `Example.txt`
Specifications that may have individual content, e.g. 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, e. g. `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: Notes indicated in this way point to information worth knowing or useful tips.

IMPORTANT: This indicates notes that carry information of **high priority**. Please definitely read and heed such notes to avoid malfunctions, loss of data or damages to devices.

1.3.3 Figures

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

1.4 Continuative Documentation

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

- *OpenScape UC Application V6 OpenScape Web Client*, quick guide.
  It describes the basic *OpenScape UC Application OpenScape Web Client* features.
- *OpenScape UC Application V6 Client Applications*, operating instructions
  This manual offers an overview of all *OpenScape UC Application* clients.

1.5 Acronyms

Table: Acronyms used

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

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

2 Operation Reference

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

2.1 General Considerations

In this section you find information about the supported web browsers and languages. We also deal with function restrictions to be considered when using *OpenScape Web Client*.

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

Supported Web Browsers

The *OpenScape Web Client* is supported by the following web browsers:

- *Microsoft Internet Explorer* 7.0 and 8.0
- *Mozilla Firefox* 3.0.x, 3.5.x und 3.6.x
- *Safari* 5 (under *Microsoft Windows XP SP2/Vista/7* and *Mac OS*, with functional restrictions under *Mac OS*).

Setting Languages via Web Browser

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

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

Restrictions when Using *OpenScape Web Client*

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

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

- The *OpenScape Web Client* does currently not support the *Completion of Calls on No Reply* feature. If this feature is triggered via telephone, the return call is signalled in the *OpenScape Web Client*, but cannot be accepted via **Call Control**.
- You can accept an incoming call via the *OpenScape Web Client* (in the **Call Control**) only if the office phone (*ONS*) has been configured as preferred device at the time the call comes in. If another device has been chosen from the device list as preferred device, the icon for accepting a call is not available in the **Call Control**. The call can only be accepted via the device currently configured as the preferred one.
- If you do not use your office phone (*ONS*) for outgoing calls but another device, the PBX will first set up a connection to this currently preferred device. The call must be accepted at this device. Only then you can set up the connection to the desired conversational partner.
- OpenScape Web Client users who are members of a Multi-Line Hunt Group (MLHG) at the same time must not configure a named device list as preferred device for incoming and/or outgoing calls.
- OpenScape Web Client users who are members of a Multi-Line Hunt Group (MLHG) at the same time must not configure their voicemail box as preferred device for incoming and/or outgoing calls.
- OpenScape Web Client users who are members of a Multi-Line Hunt Group (MLHG) at the same time are not permitted to deploy the Rule interpreter or the *Rules* feature.

Restrictions when using *OpenScape Web Client* with *Safari 5*

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

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

2.2 User Login

You invoke the *OpenScape Web Client* in your preferred web browser. The system administrator provides the *OpenScape UC Application* system URL that you need for this purpose.

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

ative information about *Single Sign-on* in the administrator documentation *OpenScape UC Application V7 Configuration and Administration*.

The *OpenScape Web Client* login dialog may like this:

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

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

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

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

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

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

2.3 Overview of the User Interface

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

- **Main menu**

  You find the main menu at the top margin of the browser window. It enables fast access to the basic program features and settings.

- **Workspace**
  The workspace comprises all features displayed beneath the main menu and offers access to the features of various function windows.

Views of the User Interface

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

- **Large view**
  The large view opens by default when you open the program for the first time. The below figure exemplifies the large view of the *OpenScape Web Client* interface with a possible arrangement of selected function windows.

You see all features shown in the workspace. The representation appears in two columns. With a click on the icon on the right margin of the main menu you can switch to the small view.

- **Small view**
  In case of the small view the displayed browser area is restricted to the left column. The main menu features are then still available. They only appear smaller, as you can see in the following window.

- **Compact view**
  The compact view of the user interface minimizes the main menu (like the small view does) and the workspace displays always only one function window.

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

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

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

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

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

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

In this dialog you can tick off or untick the corresponding checkbox to determine which tabs appear in the tab bar for selection. 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. This bookmark appears on the tab bar after you have closed the dialog. You can edit ✎ and delete ✕ all private bookmarks. You cannot change the default tabs or remove them from the list.

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

2.4 Main Menu

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

Extended View

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

Compact View

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

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

- **Pearl menu**
  This is an application menu icon for accessing the basic *OpenScape Web Client* features.
- < Name or Number > **Input field**
  Input field for phone numbers or names combined with the combo box for displaying the phone numbers you have dialed last. With a click in this entry field and after entering a phone number or name you can initiate a call or look for contact information.
  - After you have entered a number, click on to initiate the call.
  - If you want to obtain the contact data of a subscriber from all configured directories, click on after you have entered the contact's name.
- **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
- Available or **Presence Display**
  Presence display in the form of a combo box, which displays your current *OpenScape UC Application* user status. After a click on this combo box you can change this status via a selection list.
- Office phone or **Device Display**
  The device display combo box shows the device currently used for the communication. Hover with the mousepointer over the combo box to display a quick info showing the device name and address (phone number). After a click on this combo box you can change the device used via a selection list.
- **Rule Profile Display**
  This is a combo box for displaying the currently used rule profile, configuring a new rule profile and activating an existing rule profile. Depending on the caller, the call time and the user presence settings a rule profile defines to which device incoming calls are routed.
- **menu**
  This menu enables the user to access the general settings of the web interface as well as to configure the voicemail box and the *Rule interpreter* tool.
- Icon to toggle the extended and compact web browser view.

2.4.1 Pearl Menu

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

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

To close the Pearl menu click on once again of 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, e.g. because of temporary absence.

2.4.1.1 Status Information

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

- **Missed Calls**
- **Voicemail**
- **Presence prompting list**

NOTICE: When the list of **Missed Calls** features a new entry or when you receive a new voicemail or presence 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 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 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 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 checkbox 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 checkbox 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 checkbox 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 that is flagged by an additional little 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 checkbox 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 journal entries by **Date** or **Name**.

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

- A checkbox 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 that is flagged by an additional little 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.

2.4.1.2 View

The **View** feature provides fast access 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**
  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 exiting contact information. Furthermore, it is possible to start Ad-hoc conferences with selected contacts and to create, edit and start scheduled 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 scheduled conference, remove selected conferences from the conference list (only if you are the creator), and edit and start them.

- **Directory Search**
  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**
  With a click on this menu entry in the right area of the **Pearl** menu you open the **Journal** function window. This window logs all of your incoming and outgoing calls, even if you are offline.

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

2.4.1.3 Personal Settings

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

2.4.1.4 Help...

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

2.4.2 Presence Display

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

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

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

NOTICE: Whenever an *OpenScape UC Application* user adds another *OpenScape UC Application* user to his/her contact list, the system automatically sends a presence prompt to this user. 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.

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 are at your workstation but do not want to be disturbed.
- **Be right back**
  Signal for the other *OpenScape UC Application* users that you have temporarily left your workstation.

- **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.

You can enter a personal text for each status using the **Change Status Text** option. This text is displayed to the other *OpenScape UC Application* users if they position their mousepointer on your status icon.

2.4.3 Device Display

Next to the combo box for the presence display in the **main menu** you find the combo box for the device display. 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 that is already monitored by another CSTA application, e.g. *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* for making 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** with selected **Devices** tab opens.

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

2.4.4 Rule Profile Display

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

The active rule profile is additionally indicated by an arrow.

When you click on the display the following menu opens.

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

2.4.5 menu

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

The following settings can be made:

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

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

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

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

browser in a cookie when you log on to the server for the first time. In this way you can update the browser without having to log back on to the system.

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

2.5 Workspace

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

2.5.1 How to Configure your Workspace

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

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

NOTICE: In the basic state, i.e. without previous configuration, two frames are displayed next to each other (tile frames), for both of which function windows can be defined.

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

The following features are available from left to right:

- **Pearl menu**
  The Pearl menu offers here access to the same options contained in the program's main menu.
- **OpenScape**
  The product name
- **Select Perspective**
  You can use this combo box to select a view from five predefined ones.
- **Save**
  A click on this button saves modifications made to the currently displayed view.
- **Restore**
  This button lets you restore the last-saved state of the currently displayed view or the pre-defined view of the basic setting. It opens an interactive dialog. If you click on **Yes** in this dialog, the view is reset to the basic state. This is recommended e.g. if you would not like to perform a complete reconfiguration of the perspective. If you click on **No**, the view is reset to the one you have saved last. This undoes performed modifications.
- **Preview**
  This button allows checking currently performed modifications before you save them.

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

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

- **Please select a component:**
  You use this combo box to determine the features or function windows for the single frames that you wish to integrate in the workspace. The following features or function windows are currently available for integration in the interface.
  - **Add New Bookmark**
    Opens the dialog for specifying bookmarks for internet pages. These bookmarks can be integrated as windows in the workspace of the selected frame via the Show Bookmarks feature.
  - ***<Bookmark display name>***
    All internet pages you have pre-defined via **Add new bookmark** are displayed in the combo box of the component selection with the **display name** you have assigned. Thus you can create a pool of frequently required internet pages that you can directly show as window. The internet page you select here is permanently displayed in the frame that you select for one of the predefined internet pages.
    Some internet pages are programmed via *Javascript* in a way that they automatically occupy the entire browser window when being invoked. The user cannot prevent this behavior and it leads to blocking the access to the *OpenScape Web Client* user interface.
    Test this behavior by enabling the **Preview** icon. The preview window opens. If the internet page occupies the entire window space, close the preview window. Then select another internet page or the bookmark view.
    If you have selected such an internet page just the same, you can use the following URL to return to the window for configuring the workspace of *OpenScape Web Client* :

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

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

- **Journal (all Calls)**
  No matter whether you are logged on or off, the *OpenScape UC Application* server logs all in and outbound calls in the **Journal** function window. Furthermore, you can initiate connections to logged communication partners from the **Journal**.
- **Missed Calls**
  The **Missed Calls** function window enables fast access to all missed calls and calling logged communication partners.
- **Voicemail Box**
  The **Voicemail Box** function window enables fast access to received voicemails and provides controls for playing them.
- **Journal/Voicemail Box**
  This function window enables toggling the **Journal** (lists all calls) and the **Voicemail Box** (lists all received voicemails).
- **Conferences**
  The **Conferences** function window provides the controls for creating a new conference or for starting a configured conference. If you have a configured web conference connection, you can select whether this connection is to be started at a conference also.
- **Instant Messaging**
  The **Instant Messaging** function window enables sending and receiving instant messages. It also provides an overview of the active chat connections.
- **Contacts (compact)**
  This function window provides a compact view of the contact data of your *OpenScape UC Application* contact list, i.e. the contact entries are only listed with **Name** and **Number**.
- **Contacts**
  The **Contacts** function window represents your private contact list. You can add single contacts to this contact list manually or import such contacts from various directories and then group them in the list to suit your own requirements. You can also directly call single contacts, edit and remove existing contact data as well as send e-mails and instant messages from the contact list. Furthermore, it is expanded by the (**Go to**) quick-search feature for contact entries.
- **Forwarding Call**
  The **Forwarding Call** function window enables diverting incoming calls from the office phone to other configured devices.
- **Directory Search (extended)**
  The program supports integrating several directories. In the **Directory Search** function window you can search these directories for specific contacts who you may contact then directly by e-mail or phone. You can then also integrate these contacts in your private contact list.
- **Directory Search**
  In this function window you can look for a contact's second name and subsequently call this person or send him/her an e-mail or instant message.

- **Show Bookmarks**
  The **Bookmarks** function window lists all bookmarks you have created via the **Add new bookmark...** option.
- **Feature View (compact)**
  This option lets you add a function window with variable caption bar or features to the workspace. The caption bar appears as combo box. It allows quickly displaying the other available windows in the workspace.

2.5.2 General Controls

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

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

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

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

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

2.5.3 Call Control

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

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

> ***NOTICE:*** If you have inadvertently closed the **Call Control** function window during a session, 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 look for the specified contact in the configured directories. The **Directory Search** window opens, which lists the search hits. Select the desired contact and click on or . If you can reach the contact under several numbers, select one of them. The connection is being established.

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

In this function window you find the following information:

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

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

2.5.3.1 Inbound Call

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

- **Change device/forward incoming call**

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

  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 your office phone (*ONS*) as preferred device. If another device has been chosen from the device list as preferred device, the icon for accepting a call is not available in the **Call Control**. You can accept the call only via the currently configured preferred device.

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

2.5.3.2 Active Call

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

- **Change device/hand over active call**

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

  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"**

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

  Via this feature you hold the active call. You can then initiate a consultation call to another subscriber.

- **Pick up held call**

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

  This closes the connection to the consultation-call subscriber. You are automatically reconnected to the original caller.

- **Close connection**
  Terminates the active call.

2.5.3.3 Outbound Connection

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

- The system administrator has assigned you the currently used device in the CMP (Common Management Portal) as ONS number (e.g. the phone number of your office or soft phone). The *auto-answer* function for this phone number is active in the PBX (e.g. *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 used is not configured in the CMP as your ONS number (e.g. your mobile phone).
  In this case, a connection is set up from the PBX to your currently set preferred device. You need to accept this call. Only then the connection to the desired conversation partner is set up and indicated in the **Call Control**.

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

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

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

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

2.5.3.4 Consultation Call

Controls of the held Call

During the 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 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**

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

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

  Via this feature you hold the active call. You can then initiate a consultation call to another subscriber.
- **Pick up held call**

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

  This closes the connection to the consultation-call subscriber. You are automatically reconnected to the original caller.

- **Close connection**
  The consultation call is terminated.

2.5.3.5 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 in the conference notification e-mail via a link.

> ***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
- List of participants who have not joined the conference yet
- Name of the currently active speaker is highlighted

> ***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 voice 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 for 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 for subscribers with moderator or creator privileges. It cancels the conference muting.
- **End conference**
  This feature is only available for 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.

  NOTICE: Depending on the system environment, the Call Control window opened via URL allows starting an OpenScape Web Collaboration session only.

If you are on the road and do not take part in a conference with your office phone (*ONS*) but e.g. 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.

2.5.3.6 Controlling a Conference via Telephone

As *OpenScape UC Application* user you can control an active conference also via the keys of 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 * *.

Activating the Control Menu

To control a conference via the keys of your configured preferred device you first need to activate the operating menu by pushing the * key. This prevents disruptions that may occur during a conference when a telephone key is inadvertently pushed.

NOTICE: The administrator can deactivate this behavior by configuration, so that you need not activate the operating menu separately.

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 off the music. Pushing this key once more reactivates the music-on-hold.

2.5.4 Contacts

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

Compact View

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

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

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

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

Extended View

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

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

2.5.4.1 Information in the “Contacts” Function Window

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

- A radio button for selecting the entry
- The presence icon of the relevant contact:
  - **Available**
  - **Unavailable** or the contact does not allow monitoring his/her presence status
  - **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 instant-messaging (IM) status of the contact is *Unknown*. 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 the IM mode *Online* has been assigned to his/her set *OpenScape UC Application* presence status. You can immediately start a chat with this contact.
  - The IM status of this contact is *Offline*. The contact is not logged on to the IM server or system.

  If your IM mode is *Online*, you can send an instant message to a desired contact independent from his/her IM status (, ,). It may not be immediately delivered but only after the contact has logged in at the system.
  If you are in the IM mode *Offline* and try to start a chat with a contact, the following dialog opens:

You need to set your presence status as recommended in the dialog for starting a chat. After you have set the desired radio button the dialog changes automatically to the following example view:

As soon as you have finished the single chats via × , the IM dialog closes automatically.

You can assign one of the IM modes *Online* or *Offline* to every presence status. You can perform this assignment in the main menu under **menu > General ... > Presence tab > Preferences tab**.

- 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. You can determine the phone number to be used for the upcoming call via the small triangle.
- - 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 e.g. a consultation call or initiate a conference.

2.5.4.2 Controls in the "Contacts" Window

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

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

- **Create new contact entry**

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

- **Delete contact entry**

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

- **Change contact entry**

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

The settings you can perform in this dialog are identical with those in the entry mask for a new contact. This entry mask is described in detail in the subsequent section.
Additionally, you can deactivate the presence display for the selected contact who has accepted your presence request via the **Show presence information** checkbox. This means that the currently displayed presence icon of this contact entry is replaced with the icon.

NOTICE: The **Show presence information** checkbox is only displayed for *OpenScape UC Application* contacts and set by default.

- **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.
- , **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**
  To configure a new, scheduled conference, select the desired conference participant 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:

- **Start an instant-messaging conference**
  If you want to initiate a chat conference, select the desired participants from your contact list and click on . The **Instant Messaging** dialog opens. The selected contacts are invited for the chat conference.

- **More functions**
  After a click on this icon, you can choose the following features from a list:
  - **Set Tell-Me-When**
    Select this option to activate the *Tell-Me-When* function for the selected contact.
  - **Edit Tell-Me-When**
    This option is only available to you after you have selected a contact with active *Tell-Me-When* function. You can use this option to change the *Tell-Me-When* settings for the selected contact.
  - **Delete Tell-Me-When**
    Select this option to deactivate the active *Tell-Me-When* function for the selected contact.

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

  - **Show all Tell-Me-When ...**
    You can use this option to display an overview of all active *Tell-Me-When* functions.
  - **Print ...**
    Select this feature to print the complete contact list. The contact information is printed out in table form.
  - **Store Local ...**
    Select this feature to locally save the complete contact list with all data on your computer. A new window opens that displays your contact data in table form. Click on the **Save** button in this window. The directory selection dialog of Windows opens. Select here the directory as well as the file type and specify the file name under which the address list is to be stored.
  - **Synchronize**
    Use this feature to update one or several contact entries. Select the corresponding contact(s) in the list. Then select the **Synchronize** feature.
  - **Settings ...**
    Select this feature to open the configuration dialog for the address data. In there you can import and export address data as well as define new address groups.
- **"Filter by address group" combo box**
  Address groups enable the structuring of 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:

- **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.

2.5.4.3 Input Mask of a Contact

In the **Contacts** window you reach 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:

- **Last name**
  Enter a last name up to 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.

- **First name**
  Enter a first name up to 64 characters.

- **Address group**
  If required, assign an **address group** to the contact with a click on ✎ .
- **Display name**
  Enter a street address up to 64 characters.
- **Company**
  Enter a company name up to 64 characters.
- **Department**
  Enter a department name up to 64 characters.
- **Location**
  Enter a location name up to 64 characters.
- **Building/Room**
  Enter a room number up to 32 characters.
- **Business Phone**
  Enter a phone number up to 32 characters.
- **Home Phone**
  Enter a phone number up to 32 characters.
- **Mobile Phone**
  Enter a phone number up to 32 characters.
- **Fax**
  Enter a fax number up to 32 characters.
- **Business e-mail**
  Enter an e-mail address up to 64 characters.
- **Private e-mail**
  Enter an e-mail address up to 64 characters.
- **URL**
  Enter a URL up to 64 characters.
- **IM address**
  Enter an instant-messaging address up to 64 characters.
- **Comment**
  Enter a comment up to 255 characters.

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

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

2.5.5 Instant Messaging

The **Instant Messaging** window enables you to send text messages to *OpenScape UC Application* users who are currently online. You can also receive such messages from other *OpenScape UC Application* users. If your chat partner is logged in at the system, messages are instantly delivered as you send them, so that your colleague may react and answer immediately. If the contact is logged off, the instant message is immediately delivered as soon as he/she logs in again.

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

- as separate window via the **Pearl menu > View > Instant Messaging**

- as separate window with a click on , or in the **Contacts** function window
- By selecting the **Instant Messaging** option when you configure the desired view.

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

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

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

- **recent IM partners**
  This feature opens a selection dialog displaying your recent chat partners. To invite a person for a chat, select him/her by activating the checkbox 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 desktop notification displayed at the bottom right margin of the desktop.

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

2.5.5.1 Controls in the “Instant Messaging” Dialog

Controls on the Tab of an Active Chat Connection

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

- - Opens the e-mail form of your default e-mail application for sending an e-mail to this contact.
- - Initiates directly a call to the displayed chat partner.
- - Deletes the message text displayed in the text window.
- - Closes the connection to the displayed chat partner.
- - You can insert various emoticons in the text to be sent. After having called 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 via which you can invite additional *OpenScape UC Application* users to the chat. This initiates a chat conference for which the exchanged messages are displayed for 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 checkboxes next to the name entries. Press the **OK** button. 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 checkbox that precedes the respective name entry. Press the **OK** button. The selection dialog closes. A new tab is opened in the Instant Messaging function window. On this tab you can write an instant message and send it to the selected participant.
  - **a search**
    This feature opens the **Directory Search** window. Enter the data of the user with whom you would like to start a new chat in the search form. Click on the **Search** button. The search results are displayed in the lower section. Select the desired person. Then click on the **Add** button in the **Directory Search** dialog or on . The Directory Search dialog closes. A new tab opens in the **Instant Messaging** function window. On this tab you can write an instant message and send it to the selected participant.
- **Close all** button - A click on this button ends all active chats.

2.5.6 Conferences

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

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

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

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

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

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

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

2.5.6.1 Conference Types

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

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

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

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

- **Merge Calls** (expanding a consultation call to a conference)
  You set up a Merge Calls conference on the basis of a consultation call. It does not need any additional user settings. The call on-hold and the consultation call are merged to a conference via the call control. This conference is provided by the conference server of the *OpenScape UC Application*. Any number of participants can be added to the conference.
- **Meet Me**
  Meet Me conferences are recurrent server-based voice conferences planned and configured in advance. You can configure them as scheduled as well as unscheduled conferences. Scheduled Meet Me conferences are automatically started by the system at a specific time. Unscheduled Meet Me conferences are started manually by the moderator or automatically by the first participant who dials in.
  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 planned or scheduled conference that need not be started by a moderator and during which all conference participants have the same rights to start and control the conference. 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 (dial-out) . The conference starts as soon as the first conference

participant has dialed into the conference. At the same time, a call is initiated to all conference participants for whom this invitation by the system has been configured.

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

– **Moderated conference**
A *moderated conference* is started after a conference moderator has joined the conference. 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 moderator 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** checkbox in the **Add Conference** dialog.

You can expand every Meet Me conference to a web 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.

You see the web conference providers you can use in the **Web conference** combo box in the dialog for configuring a new Meet Me conference.
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, e.g. via telephone.

- **MeetNow!**

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

NOTICE: By default, the system is configured to play a short signal tone to all conference participants when somebody enters or leaves the conference. Because this tone would be disturbing

with a large number of entering or leaving conference participants, it is not played any more when the number of participants exceeds 15.

2.5.6.2 Controls in the "Conferences" Function Window

Controls in 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**
  Select the conference you want to edit from the list. Then click on . The Conferences entry mask with the data for the selected conference opens for editing.
- **Delete selected conference**
  To remove a configured conference from the list, select it and click on .
- **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):
  - Presence status of the participants
  - Name of the conference participants
  - Type of connection setup: (participant dials in himself/herself) or (participant is called)
  - Sends an e-mail with the conference information (name, PIN, etc.) to the respective conference participant.
  - Opens the **Directory Search** dialog in a separate window and displays the contact information of the respective participant available in all defined directories.
- **Start time**
  Specifies the time at which the system starts a scheduled Meet Me conference.

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

2.5.6.3 Settings of a Meet Me Conference

In the **Conferences** function window you can configure and edit a Meet Me or scheduled 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 . A calendar dialog opens, in which you define data 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. The double arrows ("<<" and ">>") let you browse the year dates. The centering icon in the middle displays the current month.
    You can set the time via the icons next to the time display. The two left-hand clock icons serve for configuring the hours (counting up (+) or down (-). The two right-hand clock icons serve for setting the minutes (counting up (+) or down (-)).
  - **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.
- **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):
  - Presence status (for *OpenScape UC Application* users only):

    Available

    Unavailable or the contact does not allow monitoring his/her presence status

    Do not disturb

    Be right back

    Busy

    In a meeting

    Presence information is invisible or not displayed
  - The name of the conference participant

- The phone number of the conference participant
- 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 to complete the participant data opens. Specify the missing data (name, phone number or e-mail address) and click on **OK** in this dialog. The selected contact is added to the list of conference participants.
  - 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 to complete the participant data opens. Specify here the **Display name** for the conference list. Finally click on **OK** in this dialog. The selected contact is added to the participant list.
  - 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.

  - Click on . The **Add participant** dialog opens. Specify here the **Display name**, the **Phone** number as well as (optionally) 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.

- **Send e-mail to all participants**

  With a click on you can send an e-mail to all conference participants. The e-mail contains the current conference access data and can be furnished with additional information. This is useful e.g. if an external conference participant is to join and you have recreated the conference access data on short notice.

  A click on opens your default e-mail application with the dialog for sending e-mails. Here, all conference participants are already addressed and the updated conference data entered.

- **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.

- **Web conference**

  The default setting of this combo box is -**none**-. With this setting a pure voice conference is configured. You can use this combo box to select the web conference provider configured on your system.

- **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. Furthermore, this text is sent via the **E-Mail to all participants** function. 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.

- **Join Option**
  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.
- **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 the conference after you have applied the settings determined in the template.
- **OK** button
  With a click on this button you can save the conference settings and close the configuration dialog.
- **Cancel** button
  With a click on this button you can close the configuration dialog without creating a conference or to dismiss all modifications you have made to an existing conference that are not applied yet.

Configuration Options of an existing Conference

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

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

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

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

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

2.5.7 Directory Search

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

Compact View

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

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

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

Extended View

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

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

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

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

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

2.5.7.1 Information in the "Directory Search" Window

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

- A radio button for selecting the entry.
- An icon displaying in which address directory the contact that has been found is.
  - - 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 that is flagged by an additional little triangle. The voicemail row is then enlarged and shows all phone numbers under which this subscriber can be reached.

2.5.7.2 Controls in the "Directory Search" Window

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

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

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

  To integrate a selected user from the search hits list in your contact directory, click on . The dialog **Contacts** (**Add entry to contact list**) 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 dialog **Contacts** (**Edit entry from contact list**), which contains already available contact data, opens. Perform the desired modifications. Click on **OK** to save the modifications and to close the **Contacts** (**Change entry in the contact list**) dialog.

- **Display user entry**
  To view the information that associates the user searched for, select the appropriate search hit. Then click on . The data that associates this user is displayed in the separate **Lookup Person** window.
- **Save addresses on local system**
  To save the found contact entries locally on your computer, click on . A new window opens that displays the found contact data in **tabular form**. Click on the **Save** button. The directory selection dialog of Windows opens. Select here the directory as well as the file type and specify the file name under which the address list is to be stored.
- **Print addresses**
  To print the found contact entries, click on . The contact information is printed out in table form.
- **Reset search entry**
  To delete all entries in the **Search** input field, click on .

2.5.8 Journal

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

Compact View

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

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

Extended View

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

2.5.8.1 Information in the “Journal” Window

The **Journal** function window displays the following information for 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.
- , 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).
- or Enables calling the displayed phone number or another phone number of the subscriber. You can access the additional phone numbers of a user by clicking on the respective receiver icon that is flagged by an additional little 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**, **Duration** (in the extended view only), **Name** or **Number**.

2.5.8.2 Controls in the "Journal" Window

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

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

- **Integrate as new user entry in the address book**
  To transfer the contact data of this call to your contact list, select the corresponding call from the journal. Then click on . The contact 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 checkbox that precedes the relevant journal entry.
- **Print journal entries**
  To print the complete journal information, click on . The journal information is shown in a separate window in tabular form. With a click on the **Print** button the list is put out on your printer.
- **Adjust the time**

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

  This is useful when you are in a different time zone, working with the program from there. The event time is then displayed in local time.
- **Per caller** checkbox
  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.

2.5.9 Missed Calls

The **Missed Calls** function window logs all calls that you did not accept. It is thus a subset 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 according to the call type.

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

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

2.5.9.1 Information in the "Missed Calls" Window

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

- A checkbox 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 - Enable 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 that is flagged by an additional little triangle. The journal row is then enlarged and shows all phone numbers under which this subscriber can be reached.

2.5.9.2 Controls in the "Missed Calls" Window

The following features are available to you in the toolbar of the compact 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 checkbox that precedes the relevant journal entry.
- **Print journal entries**
  To print the complete journal information, click on . The journal information is shown in a separate window in tabular form. With a click on the **Print** button the list is put out on your printer.
- **Adjust the time**

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

  This is useful when you are in a different time zone, working with the program from there. The event time is then displayed in local time.

- **Per caller** checkbox
  To display only one entry per caller in the **journal** you can set the **Per caller** option. If a caller tried to reach you several times, only the last attempt will be logged.

2.5.10 Voicemail Box

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

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

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

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

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

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

2.5.10.1 Information in the "Voicemail Box" Window

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

- A checkbox 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 the 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 that is flagged by an additional little triangle. The voicemail row is then enlarged and shows all phone numbers under which this subscriber can be reached.

2.5.10.2 Controls in the "Voicemail Box" Window

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

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

  NOTICE: If no single voicemail has been selected, all voicemails are deleted when you click on .

- **Save a voicemail entry locally**
  If you want to locally save a received voicemail, 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 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. With a click on the column description you can sort the journal entries ascendingly or descendingly according to **Date**, **Duration**, **Name** and **Number**.

2.5.10.3 How to Control Voicemail Playback (Voicemail Player)

You can play voicemails either via phone or PC 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 via Phone

After picking up the receiver the following controls for voicemail playback via 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 for e.g. playing a passage again.
- - Fast-forward message for e.g. skipping 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 off tone.

- - Switch tone on again.
- - Moving the slider with the mouse you can increase or decrease the volume.

2.5.11 Call Forwarding

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

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

This function window represents the compact view of the **Forwarding** tab, that you can reach via the **main menu** under **menu > General ... > Common tab**. Alternatively, you can open the extended view of this tab with a click on .

2.5.11.1 Options in the "Forwarding" Window

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

- **Activate rule profile**
  When using this option you can determine via selection of a rule profile you have created 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 to the phone number defined for this purpose without condition.
  - **on busy to**
    routes a call to the phone number defined for this purpose only when your line is engaged.

    NOTICE: This feature is only available for specific PBXs.

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

    NOTICE: This feature is only available for specific PBXs.

2.5.12 Bookmarks

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

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

2.5.12.1 Options of the “Bookmarks” Window

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

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

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

  The following options for configuring a bookmark are available in this dialog:
  - **Please select**
    You can use this combo box to select a bookmark for editing.
  - **Bookmark URL**
    Enter the internet address of the page that you want to save as bookmark.
  -
    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/Hight**
    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 hight. 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 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.

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

3.1 General Considerations

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 that are no longer required from the device list.
- **Named device lists**
  On this tab you can create phone number lists that you can select as preferred device. Via the named device lists you can flexibly administrate the call order of the preferred devices.

- **DesktopIntegration**
  Using the information on the **DesktopIntegration** tab you can download a small program at your workstation that allows calling a subscriber from any application.
  Furthermore, incoming calls and instant messages are signalled via the *OpenScape Desktop Integration* even if the *OpenScape Web Client* screen is closed.
  In the *OpenScape Desktop Integration* application you can set further start behavior, view and notification options.
- **Browser Integration**
  You can download the *OpenScape Click-to-Dial-Browser-Plug-in* via the **Browser Integration** tab. This application allows dialing a phone number directly from your web browser.

3.1.1 Appearance

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

You reach this setting 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 all show the **Standard** theme.

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

The following options are all selectable via checkboxes:

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

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

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

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

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

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

3.1.2 Journal

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

The following options are available:

- **Create Journal entries**
  Select one of the following options for your journal entries:
  - **For all calls**
    Creates journal entries for all calls
  - **Not activated**
    Disables creating journal entries.

- **Notification for missed calls**
  Here you can specify where to, in which language and in which format a notification for missed calls shall be sent. You can set the following combo boxes:
  - **E-Mail Address**
    The default setting for the notification for missed calls is **Not activated**. If you would like to be notified about missed calls, select the e-mail address the notification is to be sent to via the combo box. If this option is not available, you need to create an e-mail address first to which the notification is to be sent. You can create a list of e-mail addresses by enabling . The following dialog opens:

    In this dialog you can: Configure new e-mail addresses via the **Add** button, edit e-mail addresses via the **Modify** button, or remove them from the **List of configured e-mail addresses** via the **Delete** button.
  - **Language**
    Use this combo box to select the notification language.
  - **Format**
    Use this combo box to specify the notification format. The following table provides an overview of available message formats:

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

3.1.3 Forwarding

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

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

The following options are available:

Activate rule profile

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

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

Preferred device

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

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

  In this dialog you can:

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

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

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

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

Forward incoming calls

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

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

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

- **unconditional to**
  Use this combo box to select the device that is forwarded to if the forwarding is to occur without condition.
- **on busy to**
  Use this combo box to the select the device that is forwarded to if your office phone is engaged.

  NOTICE: This feature is only available for specific PBXs.

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

  NOTICE: This feature is only available for specific PBXs.

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

3.1.4 Devices

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

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

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

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

You can execute the following actions on this tab:

- **Configuring a new device**

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

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

- Enter the phone number of the new device in the **Phone** field.
  The following characters are allowed: the digits from 0 to 9, "()", "+", "-" as well as blanks. In case of local phone numbers you can enter only the respective extension, for example `123`. External phone numbers require specifying the complete number starting with "+", for example `+490(700)512 - 456`. Before the performed settings are saved, each phone number is automatically normalized. The list of preferred devices itemizes all configured devices and their normalized phone numbers. For example, phone number `+490123456123` is displayed for the device with the extension `123` and phone number `+490700512456` has been assigned to the device with the external phone number `+490(700)512-456`.

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

- **ring time: <number>sec.**
  Here you can set the desired ring time in seconds or adopt the default value **30** seconds. When the individual or default ring time has expired, the ring tone is automatically switched over to the next configured device.

  NOTICE: In case of a connection to a HiPath 4000 PBX the ring tone is redirected to the voicemail box after the ring time specified in this field.

- **Standard redirection timeout**
  After the ring time defaulted by the PBX has expired, the ring tone is automatically switched over to the next configured device.
- **No redirection timeout**
  The ring tone is not switched over to another configured device.

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

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

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

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

- **Removing a device from the list**

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

  IMPORTANT: The *one-number service* (by default the topmost entry in the list) and the device currently used cannot be deleted.

3.1.5 Named Device Lists

NOTICE: If you operate the OpenScape Web Client at a HiPath 4000 PBX, this tab is not available. Consequently, you cannot select any named device lists as preferred device in case of a HiPath 4000 connection.

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 setting dialog via **menu > General ... > Common tab > Named device lists tab**.

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

The device priority list is processed from top to bottom and switches the ring tone automatically to the next device after the 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:

- - Click 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.

- - Click 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** - Click this button to create a new named device list.
- **Duplicate** - With a click on the **Duplicate** button, you can create a new named device list by duplicating an already existing named device list.

Controls in the "Devices of list" section

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

- - Click on to move a selected device entry up the list. This increases the call priority for this device.
- - Click on to move a selected device entry down the list. This decreases the call priority for this device.
- - 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 off the respective checkboxes. A click on the **Add** button closes the dialog and confirms your selection. The new device appears in the list of phone numbers assigned to the named device list.
- - Click on this icon to add new phone numbers to the **List of preferable devices**. The following dialog opens:

- - Click on this icon to change an existing phone number entry.
- - Click on this icon to remove a phone number entry from the named device list.
- **Add -** Click on this button to open the **List of preferable devices** dialog for adding a new phone number entry by selecting one of your preferred devices.

3.1.6 Desktop Integration

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

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

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

Example:

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

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

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

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

Application Requirements

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

- You can use the *OpenScape Desktop Integration* with a *Microsoft* operating system only.
- If you wish to use the *OpenScape Desktop Integration* be sure to download the application via the *OpenScape Web Client* URL that you use for the *OpenScape Web Client* by default.
- Since incoming calls and instant messages are signalled via the *OpenScape Desktop Integration* a firewall used on your workstation must be configured accordingly.
  The ports to be released are:
  - For **http://** Port `7789 TCP` and/or

– For **https://** Port `8443 TCP`

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

Downloading the application

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

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

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

3.1.7 Browser Integration

On this tab you can download the *OpenScape Click-to-Dial-Browser-Plug-in* Click-to-Dial Browser Plug-in for installation. This application then enables you to dial phone numbers specified on web pages directly from your web browser. For

this purpose, all phone numbers that can be dialed on an invoked web page are marked with the corresponding country flag and the phone number is offered as link for dialing.

NOTICE: When you click the phone number and a security prompt opens because of a missing certificate, you can ignore this message and continue by confirming it.

Via the **Browser Integration** tab you can save the setup file (`ieintegration.zip`) for the *OpenScape Click-to-Dial-Browser-Plug-in* to any directory on your computer. You can then install the application on your workstation. After you have installed this application you can use the *OpenScape Click-to-Dial-Browser-Plug-in* from your browser.

NOTICE: The *OpenScape Click-to-Dial-Browser-Plug-in* is not supported with the *Safari 5* browser for *Mac OS* and *Microsoft Windows*.

You reach the **Browser Integration** tab via **menu > General ... > Common**.

The software solution *OpenScape Click-to-Dial-Browser-Plug-in* offers the following features:

- *Microsoft Internet Explorer* integration
  provides the call functionality in the *Microsoft Internet Explorer* for the versions *Microsoft Internet Explorer 7.0* and later.
- *Mozilla Firefox* Integration
  provides the call functionality *Mozilla Firefox* web browser for the versions *Mozilla Firefox 3.0* and later.

Application Requirements

One of the following operating systems must be installed on the computer for using this functionality:

- *Microsoft Windows XP Professional* from Service Pack 2
- *Microsoft Windows Vista Business* or *Enterprise*
- *Microsoft Windows 7*

You find detailed instructions for setting up and operating the *OpenScape Click-to-Dial-Browser-Plug-in* in the manual *OpenScape UC Application* V7 *Client Applications*.

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

3.2 Presence

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

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

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

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

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

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

3.2.1 My Status

Via 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.

You can enter an individual text for each available status in the **My Status Text** input field. This text is shown to the other *OpenScape UC Application* users as quick info when they position the mouse pointer on your status icon.

In the **Current location** field you can specify your current location by means of text. 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 save your settings and to close the **General Settings** dialog without saving the settings already performed.

3.2.2 Preferences

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

The following settings are available:

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

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

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

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

- **Behavior after Presence status changes**
  You can specify a preferred device and an Instant-Messaging (IM) mode for each presence status. By setting the respective checkbox 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. In addition, select in the corresponding combo box the desired IM mode - *Online* or *Offline* - , which is switched to in case of a presence status change.
  The IM status *Online* is default set for the presence statuses Available and Busy. The IM mode *Offline* is assigned to the other presence statuses by default. You can customize these settings.

  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 save your settings and to close the **General Settings** dialog without saving the settings already performed.

3.2.3 Access Control List

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

- **If other users would like to see your presence status**
  Using the options in this combo box you can define the program's behavior when other users would like to see your presence status. The following options are available:
  - **ask me**
    You are asked whether the requesting user shall be allowed to see your presence status.
  - **provide access**
    All requesting users are automatically allowed to view your presence status.
  - **block access**
    If you have selected block access, no requesting user is allowed to view your presence status.
- **When accepted, add inquiring users to the contact list.**
  If *OpenScape UC Application* users who send you a presence request that you accept are automatically to be integrated in your private contact list, tick off this checkbox.
- **These users are not allowed to see your presence status:**
  The users who are allowed to know your presence status are listed in the **These users are allowed to see your presence status:** field.

  - If you would like to block one or several of these users, activate the checkbox next to the respective names and click on the **Block** button. The users are moved to the list of blocked users.
  - If you would like to delete one or several of these users, activate the checkbox next to the respective names and click on the **Delete** button.
  - Activate the **All** checkbox and click on the **Block** button to move all users to the list of blocked users. Click on the **Delete** button to remove all users from the list.
- **These users are not allowed to see your presence status:**
  The users who are not allowed to know your presence status are listed in the **These users are not allowed to see your presence status:** field.
  - If you would like to accept one or several of these users, activate the checkbox next to the respective names and click on the **Accept** button. The users are moved back to the list of accepted users.
  - Activate the checkbox **All** and click the **Accept** button to move all users to the list of allowed users.
  - If you select a user and click then on the **Delete** button, you can only allow him/her to display your presence status after he/she has sent a new presence request.
  - Complete your settings by clicking on the **Close** button. The settings are applied and the **General settings** dialog is closed.

3.3 Addresses

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

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

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

3.3.1 Import

Via 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 field you can specify the storage location plus the name of the file you wish to import.

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

  After a click on the **Browse** button you can alternatively select the desired file via the file selection dialog.

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

  NOTICE: So that the data can be correctly imported it is necessary to know from which data source the import file was created. If you are not sure about the data source or if you cannot find the correct file format, please 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 mostly to the matching of names and phone numbers. If no phone numbers are available, the e-mail addresses are used to identify duplicates. For all other data new data records are created; they will not be searched for duplicates.

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

  NOTICE: As soon as the import is being performed by the system, your contact list will be inaccessible for a short time. If you try to access the contact list during this short period, a message will inform you accordingly. After the import process you can work with your contact list as usual.

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

3.3.1.1 File Exchange Formats

File exchange via the CSV format

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

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

Specialties when importing and exporting with Lotus Notes

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

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

– Select Structured Text as import format.

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

– Import the file as “Main Document”.

3.3.2 Export

Via the **Export** tab you can export address data in specific file formats for other applications. You reach this setting 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. The exported addresses shall be re-imported in this format.
  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 would like to export the address data as backup copy so that you can import it later on and thus restore your address list, select the *OpenScape* format.
  – If the export is performed for a reimport in Lotus Notes, the export file must not have a file extension. Otherwise, the Lotus Notes import feature will not accept this file.

- **Export**
  A click on this button starts the export process.
- **Close**
  A click on this button abandons or cancels the export process. The **General settings** dialog closes.

3.3.3 Address Groups

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

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

The following controls are available on this tab:

- Ai - 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 Communicating with Contacts

OpenScape UC Application simplifies the communication with your contacts. You are enabled to manage several communication devices so that you can 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 soft (PC) phone.

The icon preceding the contact indicates his/her current state. When you hold the cursor over the icon, the status also appears as a tool tip.

4.1 One-Number Service

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

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

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

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

4.1.1 How to Configure the One-Number Service

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

Step by Step

1) In the main menu, click **menu > General ... > Common tab > Devices tab**.
2) Click the **New** button.

   The following dialog opens.

3) Use this dialog box to add devices, e. g. cell phone, voicemail number etc., via which you can be reached to your device list.

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

Your entries are saved. The dialog box 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.

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7) Click the **Close** button.

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

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

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

- , - The contact is available for a voice call.
- , - The contact is busy on one of his/her voice devices.
- , - There is no presence information available; thus, it is not possible to specify whether the contact can be reached by phone or not. There can be several reasons for this. The presence information is not wanted by the user, the contact has rejected the presence subscription, the contact has not accepted the presence subscription, or the contact is not an *OpenScape UC Application* user. In every case it is possible to revert to voicemail.

- , - The contact can always 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 hold the cursor over the icon.

> ***NOTICE:*** The icon and tool tip display the overall availability for each media type (voice, e-mail, instant message) that is 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 who is not entered 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 PC 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 connection initiated as well as the operating elements to control this connection.
- Via the **Call Control** window
  Your can also open the **Call Control** window manually via **Pearl menu > View > Call Control**. Enter a phone number in the **New Call** combo box. Click on or push the **return key** to initiate the call.

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

4.3 Tell-Me-When

Sometimes it's hard to reach a specific contact. In this case you can make the *Tell-Me-When* feature of *OpenScape UC Application* perform actions or to 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**, you know 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 notifying types:

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

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

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

4.3.1 Tell-Me-When Feature Settings

Click **More Options** and select the **Set Tell-Me-When ...** option to configure the *Tell-Me-When* feature for a selected *OpenScape UC Application* contact and activate it subsequently.

Use the following dialog box to adapt the *Tell-Me-When* feature to suit your requirements 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 the Voice Availability.
  - The presence status of the selected contact is monitored via Presence Availability.

- The **Action** combo box defines the action to be performed when the voice or presence availability changes or which type of notification is 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. you are called by the system. After you have accepted this system call you are connected to the 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 close the dialog box. 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 box without saving the settings made.

4.3.1.1 Features of the Tell-Me-When notification window

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

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

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

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

4.3.2 List of all Tell-Me-When Entries

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

NOTICE: You can also access the dialog box **List of all Tell-Me-When entries** 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 box provides the following two buttons:

- **Delete All**
  A click on this button removes all *Tell-Me-When* entries from the list.
- **Close**
  A click on this button closes the **List of all Tell-Me-When entries** window.

4.3.3 Modifying Tell-Me-When Settings

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

To reach this dialog box, proceed as follows:

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

  NOTICE: The **Modify Tell-Me-When ...** option is displayed in the **More options** list only if you have selected the contact for which 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 box.

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

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

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

5 Step-by-Step

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

5.1 General Information

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

5.1.1 How to Log on to the System

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

Step by Step

1) Start your preferred web browser.

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

The following login dialog opens:

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

4) If required, select your **Domain**.

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

5) Here you need to enter your **Password** for logging on to the *OpenScape UC Application* system.

6) Then click on the **OK** button.

The *OpenScape Web Client* user interface opens.

5.1.2 How to Log out of the System

How to log out of the *OpenScape UC Application* system:

Step by Step

1) Click on **menu** in the main menu.

2) Select **Log off**.

The *OpenScape Web Client* login dialog appears. You are logged out of the system.

5.2 Overview of the User Interface

After you have successfully logged in at the system, the advanced view of the *OpenScape Web Client* window opens by default. It features the following elements:

Main Menu

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

Pearl Menu

This is an application menu icon for accessing the basic *OpenScape UC Application* features.

Workspace

The workspace offers access to the features of the different function windows. You can customize it by deciding which of the following function windows to display in the workspace. You can configure up to five different workspace views in the main menu under **menu > Homepage** for this purpose. You can select the following function windows:

- **Call Control**
  The **Call Control** function window lets you look for and call a contact, shows information about in- and outbound calls and provides telephony features during an active call.
- **Journal**
  No matter whether you are logged on or off, the *OpenScape UC Application* server logs all in and outbound calls in the **Journal** function window. Furthermore, you can initiate connections to logged communication partners from the **Journal**.
- **Missed Calls**
  The **Missed Calls** function window enables fast access to all missed calls.
- **Voicemail Box**
  The **Voicemail Box** function window enables fast access to received voicemails and provides controls for playing them.
- **Journal/Voicemail Box**
  This function window enables toggling the **Journal** (lists all calls) and the **Voicemail Box** (lists all received voicemails).

- **Conferences**
  The **Conferences** function window provides the controls for creating a new conference or for starting a configured conference. If you have a configured web conference connection, you can select whether this connection is to be started at a conference also.
- **Instant Messaging**
  The **Instant Messaging** function window enables sending and receiving instant messages. It also provides an overview of the active chat connections.
- **Contacts/Contacts (compact)**
  The **Contacts** function window represents your private *OpenScape UC Application* contact list. You can add single contacts to this contact list manually or import such contacts from various directories and then group them in the list to suit your own requirements. You can also directly call single contacts, edit and remove existing contact data as well as send e-mails and instant messages from the contact list. Contrary to the **Contacts (compact)** window, the **Contacts** window includes a quick-search feature for contact entries (**Go to**).
- **Forward Call**
  The **Forwarding Call** function window enables diverting incoming calls from the office phone to other configured devices.
- **Directory Search/Directory Search (advanced)**
  The program supports integrating several directories. You can search these directories for specific contacts and directly get in touch with them by e-mail or phone as well as integrate these contacts in your private *OpenScape UC Application* contact list. You can only look for the first or second name of a contact in the **Directory Search** function window. The advanced view of this function window provides further search criteria.
- **Bookmarks**
  The **Bookmarks** function window enables configuring new bookmarks or displaying internet pages via bookmarks already defined.

5.2.1 How to Configure your Workspace

You can default various *OpenScape Web Client* views to suitably react to different operating situations. All views can be displayed in the minimized or maximized representation.

How to configure a new view or edit an existing one:

Step by Step

1) Select the **Homepage** item from **menu** in the main menu.

The browser window switches to the advanced view of the setting page for views by default.

NOTICE: In the basic state, i.e. without previous configuration, two frames are displayed next to each other (tile frames), for both of which function windows can be defined.

2) Use the **Select Perspective** combo box in the main menu of this setting page to determine in which view the following settings are to be saved or called later on.

3) If required, supplement horizontally or vertically the number of displayed frames or reduce × them.

4) In the **Please select component** combo box select the desired feature for each frame you wish to integrate in the workspace.

5) Click on the **Preview** button to view the result of your interface configuration.

The previously configured interface is displayed in a separate window.

6) Close the preview window before you continue the workspace configuration.

7) Click on the **Save** button if you are satisfied with the interface.

The interface layout is saved under the configured perspective number and can be called by selecting this view.

8) Click on **Close Editing**.

The *OpenScape Web Client* workspace features the view you have configured.

5.3 Settings-related Actions

You can perform the following individual settings for each user:

5.3.1 How to Change your Password

How to change your password for logging on to the *OpenScape UC Application* server:

Step by Step

1) Click **menu** in the main menu and select the **Change Password** menu option.

The following dialog opens:

2) Enter your current password in the **Old Password** input field.

3) Enter the new password in the **New Password** input field.

4) Confirm your new password and click on **OK**.

The **Login Message** dialog opens. This dialog confirms the successful password alteration. Your modification now applies.

5) Select **menu > Log off** in the main menu.

You are logged off of the *OpenScape UC Application* server. The *OpenScape Web Client* login dialog opens.

6) Log on to the system with your user name and new *OpenScape UC Application* password.

NOTICE: Verify that the *OpenScape UC Application* password you have entered complies with the following requirements: It must comprise at least one special character, one digit and one capital letter as well as not more than three of the same character in succession.

IMPORTANT: The *OpenScape UC Application* password must not be changed again within the next 24 hours after the last alteration.

5.3.2 How to Set your own Presence Status

How to set your current presence status:

Step by Step

1) Click in the main menu on the combo box of the **presence display** or Available.

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

You presence status is integrated in the combo box of the **presence display** and shown in the contact lists of your *OpenScape UC Application* contacts.

5.3.3 How to Control the Presence Monitoring

You can use the features described in the following to allow or suppress the display of your presence status in the contact list of other users.

5.3.3.1 How to Allow Presence Monitoring

How to allow the display of your presence status in the contact list of other users:

Step by Step

1) Click on **menu** in the main menu and select the **General** option.

   The **General settings** dialog opens.

2) Switch to the tab **Presence > Access Control List**.

   The following setting dialog opens.

3) On the **Access Control List** tab you find the **These users are not allowed to see your presence status** list. Select an entry in there.

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

   The selected user is moved to the **These users are allowed to see your presence status** list.

The selected user may now see your presence status.

5.3.3.2 How to Block the Presence Monitoring

How to block the display of your presence status in the contact list of other users:

Step by Step

1) Click on **menu** in the main menu and select the **General** option.

   The **General settings** dialog opens.

2) Switch to the tab **Presence > Access Control List**.

3) On the **Access Control List** tab you find the **These users are allowed to see your presence status** list. Select an entry in there.

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

   The selected user is moved to the **These users are not allowed to see your presence status** list.

Your presence information is not displayed to the selected user.

5.3.4 How to Set the Preferred Device

How to set your preferred device for in or outbound calls:

Step by Step

1) Click in the main menu on the combo box of the **device display** or Office phone.

2) Select the desired device from the device list.

You can use the configured device for in and outbound calls from now on.

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

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

5.3.5 How to Define a new Device

How to add a new device to the device list:

Step by Step

1) Click on **menu** in the main window and select the **General** ... option.

The **General settings** dialog opens.

2) Switch to the tab **Common > Devices**.

3) Click on the **New** button or on ✚.

The following setting dialog opens.

4) Enter the desired **Name** and the **Phone** number.

5) Perform the settings for the **redirection timeout**.

NOTICE: This **timeout** specifies the ring time (sec.) after which the ring tone is automatically redirected to the next configured device.

In case of a connection to a HiPath 4000 PBX the ring tone is redirected to the voicemail box after the ring time specified in this field.

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6) Click on **OK**.

The **Devices** dialog closes and the newly created device appears in the device list.

7) Click on the **OK** button in the **General Settings** dialog.

The dialog closes and your entries are saved.

You can define the new device as your preferred one via the **device display** or Office phone in the main menu.

5.3.6 How to Configure/Activate a Call Forwarding

How to forward calls from your preferred device to another device from your device list:

Step by Step

1) Click in the main menu on **menu > General... > Common tab > Forwarding tab**.

The following setting dialog opens.

2) Depending on whether or not the calling person is to be informed about the call forwarding, continue with one of the following actions:

- Select the desired device from your device list via the **Preferred device** combo box. Your incoming calls are forwarded to the device you have just set. The forwarding is not displayed to the caller, i.e. he/she can only see your *One-Number Service*.

- Specify the desired device for the forwarding criterion (**unconditional to**, **on busy to**, **after time to**) under the **Forward incoming calls** option. Click on the corresponding combo box and select one of the devices already configured. Depending on the setting, your incoming calls are then always, only in case of a busy line or after you have not answered the phone for a specific time routed to the selected device. The caller then sees the address of the forwarding target.

3) Click the **Close** button.

Your settings are saved. The settings dialog closes.

The call forwarding has been configured and is active.

5.3.7 How to Deactivate a Call Forwarding

How to disable an active call forwarding:

Step by Step

1) Click in the main menu on **menu > General... > Common tab > Forwarding tab**.

The following setting dialog opens.

2) Depending on the active forwarding option, select the **Not activated** option in the corresponding combo box for **Preferred device** or **Forward incoming calls**.

3) Click the **Close** button.

Your settings are saved. The settings dialog closes.

The performed settings become immediately active. Call forwarding is now disabled.

5.3.8 How to Set 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 *OpenScape UC Application* contact list.

How to define your mobile time zone:

Step by Step

1) Start the program and log on to the system.

2) In the main menu select **menu > General ... > Common tab > Appearance tab**.

The following dialog opens:

3) Click on ✎ to the right of **Mobile 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) Press the **OK** button.

The settings dialog closes. Your settings are saved.

5.3.9 How to Create a new Bookmark

How to define a frequently visited internet page as bookmark:

Step by Step

1) On the **Bookmark** tab click on .

The following dialog opens:

2) Perform the bookmark settings.

3) Click on **OK**.

Your settings are saved. The **Bookmark Settings** dialog closes.

5.4 Contact Management

The following features are available for managing the contacts in your contact list.

5.4.1 How to Create a New Contact

Prerequisites

- The program is correctly configured and you are logged in at the communications system.

How to add a new contact to your contact list:

Step by Step

1) Click on in the **Contacts** function window.

The following dialog opens.

2) Enter the contact data of the new contact in the appropriate fields.

3) Click on if you wish to assign an **Address group** to the contact.

The following dialog opens.

4) Set the checkbox of the desired address group.

If you have not yet defined an address group, a corresponding message is issued in the above dialog. Using the + icon you can spontaneously create a new group in this dialog.

5) Click on **OK** to confirm you entries.

The dialog closes.

Your entries are saved. The new contact entry appears in the contact list of the **Contacts** function window.

5.4.2 How to Add a Contact from a Directory

Prerequisites

- The program is correctly configured and you are logged in at the communications system.

How to search a directory for a contact and add him/her to your contact list:

Step by Step

1) Click on in the **Contacts** function window.

The **Contacts** window opens.

2) Enter the person's **Surname** and/or **First name** in the respective fields.

3) Click on .

The dialog with the search results from different directories opens.

4) Click on the desired contact entry to select it.

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

The dialog with the search hits closes. The available contact data has been copied to the **Contacts** dialog. If desired, you can complete the contact data here.

6) Click on **OK** to confirm your entries.

The dialog closes.

Your entries are saved and the new contact entry appears in the contact list.

5.4.3 How to Edit Contact Data

Prerequisites

- The program is correctly configured and you are logged in at the communications system.

How to edit the contact information of an already configured contact:

Step by Step

1) Click on a contact's name to select him/her in the **Contacts** function window.

2) Click on .

   The following (example) dialog opens with already available contact data.

3) Make any changes in that dialog box.

4) Click on **OK**.

Your modifications have become valid and the dialog closes.

5.4.4 How to Import Microsoft Outlook Contacts

How to import address data from your *Microsoft Outlook* contact list in your *OpenScape UC Application* contact list:

Step by Step

1) Select in the *Microsoft Outlook* menu bar **File > Import/Export...**.

   The *Microsoft Outlook* wizard for importing or exporting files starts.

2) Choose in the selection field the **Export to a file** option.

3) Then click on the **Next** button.

4) In the **Create a file of type** field of the next dialog select the **Comma Separated Values (Windows)** option.

5) Confirm your selection with a click on **Next**.

6) In the **Select folder to export from** field of the next dialog select the **Contacts** folder.

7) Click on the **Next** button.

The **Export to a File** dialog opens.

8) Click on the **Browse...** button.

The file selection dialog **Browse** opens.

9) Select the storage location in this dialog and enter the name you wish to assign to the file to be created.

10) Click on **OK**.

The file selection dialog closes. The storage location is displayed in the **Save exported file as** field.

11) Click on **Next** and in the following dialog on **Finish**.

The export process begins. When the file export is complete, the Outlook Wizard closes automatically.

12) Click in your *OpenScape UC Application* client in the **main menu** on **menu > General ... > Addresses tab > Import tab**.

13) Click on the **Browse...** button for selecting the file to be imported.

14) Select in the **The address data was exported from** combo box the data source **MS Outlook** <**language**> from which the data to be imported is to be obtained.

15) Set one of the **Options** available for importing.

16) Click on the **Import** button to start the import process.

17) Confirm the displayed message with **OK**.

18) Click on the **Close** button.

The **General settings** dialog closes. Importing addresses is now complete and the imported contact data is displayed in the **Contacts** window.

5.4.5 How to Back up/Export a Contact List

Prerequisites

- The program has been configured correctly and completely.
- You are logged on to the communications system.

How to create a backup copy of your contact list:

Step by Step

1) Click in the main menu on **menu > General ... > Addresses** and select the **Export** tab.
2) Select the desired file format via the **The exported addresses will be imported again in** combo box.

   NOTICE: If you would like to export the address data as backup copy so that you can import it later on and thus restore your address list, select the ***OpenScape Web Client*** format.

3) Then click the **Export** button.

   The export process starts with the **File download** browser dialog opening for saving a file.
4) In the browser dialog click the **Save** button.

   The file selection dialog opens.
5) Select the directory in which the export file is to be saved and assign a name to the file.
6) In the file selection dialog click on **Save** to complete the export process.

You can access the export file in the specified folder in the selected format.

5.4.6 How to Import a Contact List

Prerequisites

- You have previously exported the contact list to be imported to a file of the format `*.csv` or `*.txt`.

How to integrate contact data from other address books in your *OpenScape UC Application* contact list:

Step by Step

1) Start the program and log on to the system.
2) In the main menu select **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 the data source from which the data to be imported is to be obtained in the **The address data was exported from** combo box.
6) Set one of the following import options for the import:
   - **Replace duplicates with items imported**
   - **Allow duplicates to be created**

- **Do not import duplicate items**
- **Delete all items in list prior to importing data**

7) Click on the **Import** button to start the import process.

The system accepts the import job and queues it in its job list.

8) Click the **Close** button.

The **General settings** dialog closes.

Importing addresses is now complete and the imported contact data is displayed in the **Contacts** window.

5.4.7 How to Display the Presence Status of a Contact

NOTICE: Controlling the presence display is only possible for *OpenScape UC Application* users. The presence feature is unavailable if the contact is no *OpenScape UC Application* user.

How to display presence information of another *OpenScape UC Application* user in your contact list:

Step by Step

1) Click in the **Contacts** function window on the name of the contact whose presence information is to be displayed.

2) Click on .

The **Change entry in the contact list** dialog opens with the already available contact data.

3) Set the **Show presence information** checkbox.

4) Press the **OK** button.

The **Change entry in the contact list** dialog closes. The current presence status of the selected contact is displayed in the **Contacts** function window.

NOTICE: As long as the **Show presence information** checkbox has not been set for the corresponding contact, the icon is displayed in the contact list for the presence status of this contact. With this checkbox being set and the contact having accepted your presence request, you can see his/her current presence status in your contact list. If the contact does not allow viewing his/her presence status, it is represented as **unavailable** in your contact list.

5.4.8 How to Edit Presence Prompts

As soon as an *OpenScape UC Application* user has added you to his/her contact list, you receive a presence prompt as *OpenScape UC Application* user. In this dialog you can decide whether or not to allow the prompting user to see your presence information.

How to edit a presence prompt:

Step by Step

1) Click on **presence prompt list**.

The **Presence Prompting** dialog opens.

2) Set the **When accepted, add inquiring users to the contact list** option if required.

This copies the contact data of the prompting users automatically to your contact list when you accept the request.

3) Accept the request by clicking the **Accept** button or reject it by clicking **Block**.

The respective setting is configured in the system and the **Presence Prompting** dialog closes.

5.4.9 How to Create a new Address Group

Proceed as follows to define a new address group:

Step by Step

1) Click in the combo box of the **Contacts** function window. The **Display all** option is set in this combo box by default.

The list of already existing address groups is displayed.

2) Select here the **Edit** feature.

The **General settings** dialog opens. You can already see the **Address groups** tab.

3) Click on the **New group** button.

The **Address groups** list features a new entry named **new address group**.

4) Click on the defaulted name **new address group**.

The name of the address group is represented as entry 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) Press the **OK** button.

The address group is saved and the **General settings** dialog closed.

Specifying the address group is thus accomplished. You can now select this group under the entered name in the combo box of the **Contacts** dialog.

5.4.10 How to Delete an Address Group

Proceed as follows to delete an address group:

Step by Step

1) Click in the combo box of the **Contacts** dialog.

The list of already existing address groups is displayed.

2) Select here the **Edit** feature.

The **General settings** dialog opens. You can already see the **Address groups** tab.

3) Select the address group that you want to delete.

4) Click on ×. The address group will be removed from the list.

5) Press the **OK** button.

Your modification is saved and the **General settings** dialog closed.

5.4.11 How to Filter a Contact List by Address Group

How to display the contacts of an existing address group in the contact list:

Step by Step

1) Click in the combo box of the **Contacts** dialog.

The list of already existing address groups is displayed.

2) Select the desired address group.

The address group is displayed in the combo box and the associated contacts appear in the **Contacts** dialog.

5.4.12 How to Rename an Address Group

Proceed as follows to rename an address group:

Step by Step

1) Click in the combo box of the **Contacts** dialog.

   The list of already existing address groups is displayed.

2) Select here the **Edit** feature.

   The **General settings** dialog opens. You can already see the **Address groups** tab.

3) Select the address group that you want to rename.

4) Click on the address group name or on .

   The cursor appears in the name entry.

5) Change the address group name.

6) Push the **return key**.

   The changed name is itemized in the list of configured address groups.

7) Click on **OK**.

Your modification is saved and the **General settings** dialog closed.

> ***NOTICE:*** When you complete the renaming with **OK**, the address group will be modified in all data records that access it.

5.4.13 How to Assign an Address Group to a Contact

Proceed as follows to assign an address group to a contact:

Step by Step

1) Open the **Contacts** function window.

2) Click on the name of the contact who you wish to assign to a previously defined address group to select him/her.

3) Click on .

   The **Change entry in the contact list** dialog opens with the already available contact data.

4) Click on .

   The **Assign address groups** dialog opens.

5) Set the checkbox of the desired address group.

6) Afterwards, click on **OK**.

The **Assign address groups** dialog closes. Your settings are applied.

7) Click on **OK** in the **Change entry in the contact list** dialog.

Your settings are saved and the dialog closes.

5.5 Communicating with your Contacts

The following features are available for communicating with other subscribers:

5.5.1 How to Call a Contact

Prerequisites

- The program has been configured correctly.
- You are logged on to the communications system.

How to call a contact from your contact list:

Step by Step

› Click in the **Contacts** function window on in the row of the desired contact entry.

> ***NOTICE:*** If more than one number is specified for the contact, click on to select the desired one.

> ***IMPORTANT:*** If the device you have set as the preferred one is not your office phone, the PBX will first set up a connection to this configured device. After your call has been accepted on this device, the connection to the other subscriber is set up.

The connection is established and displayed in the **Call Control** function window.

5.5.2 How to Dial a Phone Number

Prerequisites

- The program has been configured correctly.
- You are logged on to the program.

How to set up a connection to any phone number:

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 e. g. your mobile phone as preferred device, a connection from the PBX to your preferred device is set up first. You need to accept this call before the connection to the conversational partner can be established.

5.5.3 How to Dial by 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 (e.g. a word processing program):

Step by Step

1) Select the phone number in the application (e.g. in a word processing program) and copy it with **[Ctrl] + [C]** or with the features provided by the application to the clipboard.

2) Paste the phone number with one of the following hotkeys from the clipboard into the **<Name or Number>** combo box in your client's main menu:

   a) **Shift key + [Ins]** without office code

   b) **[Ctrl] + [V]** without office code

3) Click on in the main menu.

The connection is immediately set up and displayed in the **Call Control** function window.

5.5.4 How to Accept a Call

Prerequisites

- The program has been configured correctly and completely.
- You are logged on to the communications system.

How to accept an icoming call displayed in the **Call Control** function window:

Step by Step

› Click on in the **Call Control** function window.

> ***IMPORTANT:*** If you do not have set your office phone as preferred device but another one, the icon is not available in the **Call Control** function window. In this case you can accept the call only on the configured device but not via the **Call Control** function window.

You are connected to your conversation partner. The **Call Control** function window shows call control features.

5.5.5 How to Transfer an incoming/active Call to another Subscriber

This action transfers the control of an incoming or accepted call to another subscriber. Proceed as follows:

Step by Step

1) Click on in the area of the displayed call in the open **Call Control** window.

The **Redirecting Call** dialog opens.

2) Enter the phone number of the desired subscriber in the input field of this dialog.

3) Select the **Handover to** option.

The caller is connected to the new subscriber. Your connection is automatically closed. The **Call Control** function window closes.

5.5.6 How to Change the Preferred Device during an Active Call

This action allows you to stay in control of the call.

Step by Step

1) Click on in the area of the displayed call in the open **Call Control** window.

The **Redirecting Call** dialog opens.

2) Select the **Transfer to** option.

3) Select the desired device in the displayed device list.

The call has been transferred to the new device and must be continued at this device.

5.5.7 How to Make a Consultation Call

If you are in an active call and wish to call another subscriber for consulting him/her, proceed as follows:

Step by Step

1) In the **Call Control** function window, enter the phone number of the subscriber you wish to consult in the **New Call** entry field.

2) Click on to the right of the **New Call** field to initiate the call.

The connection to the first conversational partner is automatically being held and he/she hears music(-on-hold). You can now talk to the consultation-call subscriber.

5.5.8 Toggling

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 held.

5.5.9 How to Transfer a Call to a new Subscriber

Prerequisites

- You are conducting a consultation call.

How to connect the original caller to the consultation call subscriber during a consultation call:

Step by Step

› In the **Call Control** function window click on in the area of the held call.

Your connection is automatically closed. The other two subscribers can talk to each other.

5.5.10 How to End a Call

How to clear a connection listed in the **Call Control** function window:

Step by Step

› Click in the **Call Control** function window on in the area of the active call.

The connection is cleared and does no longer appear in the **Call Control** function window.

5.5.11 How to Display Missed Calls

How to display a list of all missed calls:

Step by Step

› Click on **Missed Calls** in the tab bar under the main menu.

The **Missed Calls** tab opens in the workspace. This tab lists all missed calls .

5.5.12 How to Sort Journal Entries by Call Type

How to display only specific call types in the journal:

Step by Step

› In the combo box at the top right margin of the **Journal** function window select the call type you wish to have displayed in the **Journal**:

- **All Calls** (default)
- **Missed Calls**
- **incoming calls**
- **outgoing calls**

The **Journal** function window lists only the calls of the selected call type.

5.5.13 How to Start a Chat (Instant Messaging)

How to start a chat with another *OpenScape UC Application* user:

Step by Step

1) Open the **Contacts** function window.

2) Click on , or in the row of the desired contact.

The **Instant Messaging** window opens.

3) Enter the instant message your 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 chat partner's IM mode (online, offline or unknown) the message may be delivered instantly or delayed.

5.5.14 How to Send an E-Mail to a Contact

Prerequisites

- An e-mail address has been configured for the contact under the contact information.

How to send an e-mail to a contact:

Step by Step

1) Click on in the **Contacts** function window in the row of the desired contact.

Your pre-configured default e-mail application starts.

2) Write and send the e-mail message as usual.

The window of the e-mail application closes. The e-mail was sent.

5.5.15 How to Play Voicemails via Telephone

Execute the following steps to play your voicemails via telephone:

Step by Step

1) Open the **Voicemail Box** function window.

You find a list of all played voicemails and of those that have not been played yet .

2) Activate the check box preceding the entry of the voicemail you would like to play.

3) Click on the icon.

The **Voicemail-Player** window with the set **Telephone** option opens.

4) Pick up the receiver.

The voicemail playback starts immediately.

5.5.16 How to Play Voicemails via the Windows Media Player

Execute the following steps to play your voicemails via the *Windows Media Player*:

Step by Step

1) Open the **Voicemail Box** function window.

You find a list of all played voicemails and of those that have not been played yet .

2) Activate the check box preceding the entry of the voicemail you would like to play.

3) Click on the icon.

The **Voicemail-Player** window with the set **Telephone** option opens.

4) Select the **Browser** option.

The view of the **Voicemail-Player** window changes as follows:

After a short initialization period (connection is being set up), "Ready" is displayed under the controls.

5) Click on .

The voicemail playback starts.

5.5.17 How to Activate Tell-Me-When

How to configure and activate the *Tell-Me-When* feature for one of your *OpenScape UC Application* contacts:

Step by Step

1) Open the **Contacts** function window with a click on the corresponding tab in the tab bar under the main menu.

2) Select the contact entry for which you wish to activate the *Tell-Me-When* feature.

3) Click in the **Contacts** function window in the toolbar on and select **Set Tell-Me-When ...** .

The following dialog opens.

4) Set the desired option in the **When ... Changes to** combo box.

5) Select the desired option in the **Action** combo box.

6) Determine the desired timeout for the *Tell-Me-When* feature in the **Expires** combo box.

7) Click on **OK**.

The **Tell-Me-When** dialog closes.

The *Tell-Me-When* feature is no longer active for the selected contact. A special icon to the left of the contact name in the contact list indicates this.

5.5.18 How to Deactivate Tell-Me-When

How to deactivate the Tell-Me-When feature for a selected contact:

Step by Step

1) Click in the toolbar of the **Contacts** function window on ▸▸ **More functions**.

2) Select **Delete Tell-Me-When**.

The Tell-Me-When feature is no longer active for the selected contact.

5.6 How to Collaborate with Contacts

This software solution offers the following features for collaborating with other participants.

5.6.1 How to Start an Ad-hoc Conference

How to start an Ad-hoc conference with selected participants:

Step by Step

1) Select the contacts to hold a conference with in the **Contacts** window.

2) Then click on .

A settings dialog opens.

3) Assign a **Name** to the conference and change the defined participant entries if desired ( ).

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

The **Call Control** function window opens. All participants are connected after they have lifted the receiver. The spontaneously started conference is also listed in the **Conferences** window and indicated by or .

5.6.2 How Add a Participant to an Active Conference

If you would like to add another participant to the 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 hits and confirm your selection with **OK**.

5) Click on in the **Call Control** function window.

The new participant is called by the system. He/she is connected to the conference after he/she has picked up the receiver.

5.6.3 How to Configure a Meet Me Conference

How to configure a new Meet Me conference:

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 setting 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 **Join 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 setting dialog.

   The **Bridge number** field is filled in automatically and the conference **PIN** is generated. Subsequently, you can perform further configuration changes. The conference name appears as entry in the **Conferences** window.
8) Click on **OK** to save modifications and to close the dialog.

The new conference is listed in the **Conferences** window and can be started from there.

5.6.4 How to Initiate a Merge Calls Conference

Expanding 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 waiting 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.

5.6.5 Configuring a Scheduled Meet Me Conference

How to configure a scheduled Meet Me conference:

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 setting 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** checkbox.

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 **Join Option**s for the conference.

12) Click on the **Apply** button to save your settings without closing the setting 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 starts the conference automatically appears under **Start time**.

5.6.6 How to Join an Active Meet Me Conference

You must be a conference participant before you can join a conference already in progress.

Step by Step

1) In the **Conferences** window click on to the left of the name of the active conference you wish to join.

A selection list appears.

2) Select the **Join Conference** option in the open selection list.

You are connected to the conference.

5.6.7 Initiating a MeetNow! Conference

Prerequisites

- All conference participants have been informed by e-mail or via 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 PIN via phone keypad or PC keyboard.

3) Conclude the PIN entry with the # key.

You are directly connected to the MeetNow! conference.

5.6.8 How to Display Conference Data

How to display the conference data of a conference itemized in the conference list:

Step by Step

1) Select the desired conference in the **Conferences** window.
2) The click on ▸ to the left of the conference name.

The conference data is displayed under the selected list entry.

5.6.9 How to Edit Conference Settings

How to change an already defined conference, e.g. to add a participant:

Step by Step

1) Select the relevant conference in the conference list in the **Conferences** window.
2) Click on .

   The settings dialog opens with the data of the already defined conference.
3) Modify the data as desired.
4) Click on **OK**.

Your modifications are saved. The settings dialog closes.

5.6.10 How to Start an Ad-hoc Web Conference

If you would like to start spontaneously a web conference with other contacts, proceed as follows:

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 setting 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 via which you need to download the program required for the web conference.

6) Click on the **Apply** button in this dialog.

After successful download a security warning is displayed.

7) Confirm this security prompt with a click on the **Apply** button.

The connection to the web conference server is set up.

5.6.11 How to Start a 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 successful download a security warning is displayed.

4) Confirm this security prompt with a click on the **Apply** button.

The connection to the web conference server is set up.

5.6.12 How to Initiate a Handover via DTMF Key

How to change a device you use in a conference:

Step by Step

1) Push the jkl 5 key.

2) Enter the phone number of the device you want to switch to.

3) Complete entering the phone number with the # key.

The entered phone number is announced for you to check.

4) You are then prompted to continue with one of the following options:

- Push the 1 key to perform the handover,

- push the abc 2 key to abandon the process.

6 Rule interpreter - Routing Calls with Rules

The Rule interpreter of the *OpenScape UC Application* is a tool which analyzes the incoming calls automatically using customized rules and routes these calls to a determined 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 help for you. For example, you can specify that calls arriving during a meeting that takes place regularly once a week at a specific day and time are automatically routed to your secretary.

> ***NOTICE:*** Forwarding settings have priority over Rule interpreter settings. Conflicts between these settings may also occur. If you want to ensure that your rules are processed, you should deactivate call forwarding.

You can use the rule profile to control the routing of your incoming calls to other devices. Incoming-call routing may occur according to the following criteria:

- Depending on the caller's phone number
- Depending on the date or time at which the call comes in
- Depending on the setting of your presence status

You can activate a rule profile you have created by one of the following actions:

- Via the rule profile display combo box of the main menu by selecting the desired rule profile there
- Via the **Forwarding** function window
- Via the **main menu > menu > General ... > Common tab > Forwarding tab**

6.1 The Terminology of the Rule interpreter

This section mentions and describes the functional units which provide the functionality of the Rule interpreter and the understanding of which is important for the correct use of the Rule interpreter.

Rule

A rule defines how to handle incoming calls, e.g. if they are to be redirected or put through to your.

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 the position of a rule in the list, the higher its priority in the executing 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. If it applies, the call is put through to your cell phone. In this case, the other rules are not checked. If rule 11 does not apply, rule 12 is processed as the next rule in the rule list. If it applies, 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, e. g. *Family*, *Preferred Customers*, *Unwanted Callers*. The Rule interpreter offers 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 the rule. The rule itself need not be modified.

Date Lists

You can use a date list to determine that a rule is only to apply on specific days. For example, a rule may only apply during your short breaks and your annual holiday. In this case you can define single days and also periods in this rule. So that you need not alter the rule when your holidays are rescheduled, you can also specify a date list and link it to the rule. You only need to modify the list then, but the rule itself remains unchanged.

6.2 Applying the Rule interpreter - Examples

The Rule interpreter supports you in the most different situations. The following three scenarios are examples and are intended to help your to better understand the functionality of Rule interpreter.

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 that 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.. You family may reach you any time.

Realization

You enable the mentioned sample scenarios in the Rule interpreter by specifying profiles, rules, list of persons and date lists. You can adapt these scenarios to suit your requirements or create new scenarios, thereby building your own body of rules.

6.2.1 Scenario 1: "In the Office"

In this example scenario, calls from determined 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 list of persons "Unwanted callers". If so, the call is redirected to the secretary. If not, the call is put through.

6.2.1.1 Scenario 1: How to Create 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 **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 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 entry 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 entry field.

d) Enter the name `"Unwanted callers"` for the list of persons and push the **return key** on your keyboard.

The list of persons "Unwanted callers" is displayed in the **List of persons** section. The list does not contain any person entries yet.

4) Add persons to the list of persons "Unwanted callers".

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/e-mail** input field, enter the phone number of the person.

d) Click on **OK**.

The input dialog closes. The new person entry has been integrated in the list of persons "Unwanted callers".

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 entry 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, e. g. **Low**.

b) In the lower section, click **If call from**.

The following dialog opens.

c) Click on .

The following selection dialog opens.

d) Select the list of persons "Unwanted callers" 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 + 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 **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 by clicking the **Close** button.

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. For the routing of your incoming calls, the rules of this profiles are used.

6.2.2 Scenario 2: "In Meeting"

Supposed, you take part in a company meeting and have set your *OpenScape UC Application* presence status to **In meeting**. All calls during this meeting are redirected to your secretary. Calls from members of your family or preferred customers are redirected to your cell phone.

To set up the scenario, you need:

- a new profile "In meeting"
- a new list of persons "Family"
- a new list of persons “Preferred customers“
- a new rule “Put Through“
- a new rule "Redirect all"

Function

First, the rule "Put through" checks whether your presence status is "In meeting" and whether the call comes from a member of your family or a preferred customer. If so, 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 (e.g. Normal) as the "Redirect all" rule (e.g. Low). If not, the members of your family as well as the preferred customers would always reach your secretary as the "Put through" rule would never be applied.

6.2.2.1 Scenario 2: How to Create 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 **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 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 entry 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 list of persons "Family".

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 entry field.

d) Enter the name `"Family"` for the list of persons and push the **return key** on your keyboard.

The list of persons "Family" is displayed in the **List of persons** section. The list does not contain any entries yet.

4) Add a person to the list of persons "Family".

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/e-mail** input field, enter the phone number or the e-mail address of that person.

d) Click on **OK**.

The input dialog closes. The new person entry has been integrated in the list of persons "Family".

5) Create the list of persons "Preferred customers".

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 entry 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 list of persons "Preferred customers".

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 entry 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, e. g. **Normal**.

b) In the lower section, click **If call from**.

The following dialog opens.

c) Click on .

A selection dialog opens which features the existing lists of persons.

d) Select the lists of persons "Family" and "Preferred customers".

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 **If my status is**.

A selection dialog opens which allows you to set the desired presence status.

h) Activate the **"In meeting"** checkbox and click **OK**.

The selection dialog closes.

i) Keep the default setting **Put straight through** under **Action**.

j) Click **Assigned profiles**.

A selection dialog opens which allows you to set the desired rule profile already defined.

k) Select the profile "In meeting" and click **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 profile "In meeting".

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 entry 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, e. g. **Low**.

b) Under **If call from**, keep the default setting **All**.

c) In the lower section, click **If my status is**.

A selection dialog opens which allows you to set the desired presence status.

d) Activate the **In meeting** checkbox and click **OK**.

The selection dialog closes.

e) In the lower section, click **Action**.

The following window opens:

f) Click + 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 **Assigned profiles**.

A selection dialog opens which allows you to set the desired rule profile already defined.

k) Select the profile "In meeting" and click **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. For the routing of your incoming calls, the rules of this profiles are used.

6.2.3 Scenario 3: "On Business Trip"

You are on a business trip for a week. During this time, all calls from members of your family and preferred customers are to be redirected to your cell phone and the rest of calls to your secretary. Your family should always be able to reach you, the preferred customers, however, only during the business hours from 08:00 a.m. to 4:30 p.m.

To set up the scenario, you need:

- a new profile "On Business trip"
- a new list of persons "Family"
- a new list of persons “Preferred customers“
- a date list "Business trip"
- a new rule "Redirect family"
- a new rule “Redirect preferred customers“
- a new rule "Redirect all"

Function

First, the “Redirect family” rule checks whether the call comes from a member of your family. If so, the call is redirected to your cell phone. If not, the “Reroute preferred customers” rule will check whether the call comes from a preferred customer and whether he/she calls between 08:00 a.m. and 4:30 p.m. If both conditions are met, the caller is routed to your cell phone. However, if a preferred customer dials your number outside business hours (8:00 a.m. to 4:30 p.m.), the call is redirected to the secretary by the "Redirect all" rule.

The order of rules is important: The "Redirect family" rule has the highest priority, the "Redirect preferred customers" rule has medium priority and the "Redirect all" rule has the lowest priority. If, for example, the “Reroute all” rule came in second position, you could be reached by your family but the preferred customers would always talk to your secretary as the “Reroute preferred customers” rule would never be applied.

6.2.3.1 Scenario 3: How to Create 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 **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 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 entry 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 list of persons "Family".

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 entry field.

d) Enter the name "Family" for the list of persons and push the **return key** on your keyboard.

The list of persons "Family" is displayed in the **List of persons** section. The list does not contain any person entries yet.

4) Add persons to the list of persons "Family".

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/e-mail** 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.

5) Create the list of persons "Preferred customers".

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 entry 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 list of persons "Preferred customers".

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 entry 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 entry 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, e. g. **High**.

b) In the lower section, click **If call from**.

The following dialog opens.

c) Click on .

A selection dialog opens which features the existing lists of persons.

d) Select the list of persons "Family".

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 in the **Date** section.

A selection dialog opens which 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 + 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 **Assigned profiles**.

A selection dialog opens which allows you to set the desired rule profile already defined.

r) Select the profile "On Business Trip" and click **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 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 entry 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, e.g. **Normal**.

b) In the lower section, click **If call from**.

c) In the dialog that opens, click .

A selection dialog opens which features the existing lists of persons.

d) Select the list of persons "Preferred customers".

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 in the **Date** section.

A selection dialog opens which 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 checkboxes **Mo**, **Tu**, **We**, **Th**, **Fr** to define on which days of the week to apply the rule "Redirect preferred customers".

l) Click + in the **Time** section.

The following input dialog opens.

m) For the **Time range**, enter, for example, under **from** 08:00 a.m. and under **to** 4:30 p.m.

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 are applied.

p) In the lower section, click **Action**.

The following window opens:

q) Click + 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 **Assigned profiles**.

A selection dialog opens which allows you to set the desired rule profile already defined.

v) Select the profile "On Business Trip" and click **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 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 entry 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, e.g. **Lowl**.

b) Under **If call from**, keep the default setting **All**.

c) In the lower section, click **Action**.

The following window opens:

d) Click + 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 **Assigned profiles**.

A selection dialog opens which allows you to set the desired rule profile already defined.

i) Select the profile "On Business Trip" and click **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. For the routing of your incoming calls, the rules of this profiles are used.

6.3 Functions and Interface of the Rule interpreter

This section contains reference information for the Rule interpreter tool. It is intended to serve as reference for the functions and the user interface of the Rule interpreter. The settings you see in the figures are examples and need to be replaced with the scenario settings or your own ones.

All dialogs in which you define profiles, rules, lists of persons and date lists can be invoked via the main menu under **menu > Rules ...**.

6.3.1 How to Creating 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 the name **New profile** to change it.

The profile name is represented as entry field.

5) Enter the new name and push the **return key**.

The profile name should now reflect your change. The new profile has been created. However, it has not been assigned any rules yet.

The new profile has been created. However, it has not been assigned any rules yet.

6.3.2 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 entry field.

5) Enter the desired name for the new rule and push the **return key** on your keyboard.

The rule name should now reflect your change.

6) Configure the newly created rule.

a) Activate one of the radio buttons **High**, **Normal** or **Low** to define the priority group for the rule.

Your setting will be applied and saved automatically. The priority group of the new rule is also adapted automatically in the **Rule** section.

b) Click **If call from** to define one or more phone numbers for incoming calls.

c) Click **If date/time** to define the date and the time for which the rule is to apply.

d) Click **If my status is** to set the dependency of the rule on your presence status.

e) Click on **Action** to define whether the incoming call from the phone number set under **If call from** is to be put through or forwarded.

f) Click on **Assigned profiles** to assign the rule to one or more already defined profiles.

The new rule has been created and configured.

6.3.3 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 your 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 it will be processed earlier.

6.3.4 How to Create a New List of Persons

This section explains how to create a new list of persons. By using lists of persons, callers are divided in groups 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.

How to create a new list of persons:

Step by Step

1) Click **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 entry 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/e-mail** input field, enter the phone number or the e-mail address of that person.

d) Click on **OK**.

The input dialog closes. The new person entry has been integrated in the list of persons.

The new list of persons has been created and contains the desired person entries. However, it cannot be used by the Rule interpreter as it has not been assigned to a rule yet.

6.3.5 Creating a Date List

This section explains how to 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.

How to create a new data list:

Step by Step

1) Click **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 entry 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** checkbox.

The right calendar is displayed.

e) Select the end date (**to**) in the right month display.

The end date you have defined (**to**) appears above the right month display.

f) Click on **OK**.

The input dialog closes. The new date information has been integrated in the date list.

The date list has been created. However, it has not been assigned to a rule yet.

6.3.6 How to Define the Time for a Rule

Rules may apply for determined days (defined e.g. in date lists) and/or for determined days of the week and/or for determined times. This section describes how to set for a rule the day of the week and the time the rule is to apply for.

Prerequisites

- You have already created at least one rule.

Step by Step

1) Click **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 checkbox(es) of the desired day(s) of the week.

6) Click + 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` (e.g. `00:00`).

8) In the **to** input field, enter the desired end time. The valid format for the time input is the same as for the **from** input field.

9) Click on **OK**.

The input dialog closes. The configured time is displayed in the **Time** section of the dialog.

10) Click on **OK**.

The dialog closes.

The performed settings have been applied and saved. Your time information for the selected rule appears on the **New/edit** tab under **If date/time**.

6.3.7 How to Activate a Rule Profile

So that a profile and the rules linked to it can take effect, it must be activated.

Step by Step

1) Click on the combo box in the main menu.

A selection menu opens.

2) In this menu, select the desired rule profile marked by the symbol .

The symbol changes to .

The selected profile is active.

6.3.8 How to Deactivate a Rule Profile

Deactivate an active rule profile to accept your calls as usual in your workplace.

Step by Step

1) Click on the combo box in the main menu.

A selection menu opens.

2) Select **Deactivate rule profile**.

The selected profile is inactive.

6.3.9 "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, for example:

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.

Operating elements in the "Profiles" section

This section may look like this, for example:

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.

Operating elements in the "Rules of profile" section

This section may look like this, for example:

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 box, 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 box 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 box changes automatically to the **New/edit** tab.

- **Undo** button - Click this button to undo the changes made to the rules of the corresponding profile.

6.3.10 "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 box Rules with the **New/edit** tab opens. By default, this tab looks as follows:

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.

Operating elements in the "Rule" section

This section may look like this, for example:

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, for example:

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 box.
- - 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 checkboxes for each profile via the rule setting **Assigned profiles**.

- - Click this button to open the editing dialog box of the corresponding rule setting.
- - After clicking this icon the respective rule setting is reset to its default value.
- **Undo** button - Click this button to undo the changes made to a rule.

Rule settings

For each rule you can specify the following settings:

- **If call from**
- **If date/time**
- **If my status is**
- **Action**
- **Assigned profiles**

Click or simply the corresponding line to open a dialog for each of these settings where you can perform the corresponding rule setting.

6.3.10.1 If Call from

Use this setting to determine for which callers the rule is to 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 box:

This dialog box 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 box.
  - 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:
  - Checkboxes - To select the person entries
  - Add - Click this button to add the selected persons to the rule and close the dialog box.
  - Cancel - Click this button to close the dialog and dismiss the settings made.
- - Click this button to search the configured directories for a determined person and add him/her subsequently to the rule. The following dialog opens:

In the following input fields, enter the desired search criteria:

- Name - Search for a person via his/her last name
- First name - Search for a person via his/her first name
- Phone - Search for a person via his/her phone number
- Address group - If you have grouped your contacts in address groups, you can enter here the address group the person you are looking for belongs to.
- Address book - Specify here the address book in which you want to search.
- Max. matches - Specify here how many hits are to be displayed at the most 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 edit 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 **Lookup person** dialog that opens.
- - Click this button to save the contact entries found locally on your computer.
- - Click this button to print the contact entries found in table 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. Use the following dialog that opens to define for a new person a **Display name**, a **Phone** number and an **E-mail** address.

After having assigned to the rule a person and a list of persons, the dialog box may look like this:

You can apply the following actions to a person entry:

- - Click this button to change the date for the existing person entry.
- - Click this button to remove the corresponding person entry from the list of callers for this rule. The person entry will be deleted from the list for the rule setting **If call from**, but will stay in the list of persons **Recently used** defined by default, so that it can be reused, if required.
- - Click this button to remove a list of persons assigned to the rule from the list.

6.3.10.2 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 box:

The dialog box is divided into the following sections:

- **Date -** In this section, define in which period the rule is to apply, e.g. 26 June to 12 August.
- **Weekday -** In this section, define the weekdays on which the rule is to apply within the time range specified, e.g. only from Monday to Friday.
- **Time -** In this section, configure at which time the rule is to apply, e.g. 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 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 add it directly to the rule. The following dialog opens:

  To set the date, the following operating elements are available:

  – **Display name - In this input field, enter an expressive name for the date entry.**

- **from** - In this calendar, the current date is marked by default by a light blue rectangle. 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 combo 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` (e.g. 15:40) directly in the following dialog box.

- - Click this button to modify an already defined time.
- × - Click this button to remove an already defined time.

6.3.10.3 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 checkbox 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 are at your workstation but do not want to be disturbed.
	Signal for the other *OpenScape UC Application* users that you have left your workstation for a short period.
	Signal for the other *OpenScape UC Application* users that you can be reached at your workstation but only want to be disturbed in urgent cases.
	Signal for the other *OpenScape UC Application* users that you are currently in a meeting and cannot be reached.

- **OK -** Click this button to save all settings made and close the dialog.
- **Cancel -** Click this button to close the dialog and dismiss the settings made.

6.3.10.4 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 box:

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:
  - ▼ - Click the small triangle of this combo box to open the selection menu that contains the forwarding destinations used last. Select your forwarding destination in there.
  - ✎ - Click this button to modify the name and the phone number for an already defined forwarding destination in the following dialog box.

  - 📄 - 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 directly a new forwarding destination. The following dialog box opens which allows you to define for the forwarding destination a display name and a phone number.

- **Use preferred device** - Activate this check box ( ) to set the forwarding destination for incoming calls in 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.

- **OK -** Click this button to save all settings made and close the dialog.
- **Cancel -** Click this button to close the dialog without saving the settings made.

6.3.10.5 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 box:

The following operating elements are available in this dialog:

- By activating the check box that precedes the desired profile, a profile is assigned to the rule.
- **OK -** Click this button to save all settings made and close the dialog.
- **Cancel -** Click this button to close the dialog without saving the settings made.

6.3.11 "Lists of persons" Tab

You can use this tab to manage lists of persons. Via the **If call from** and **Action** options on the **New/edit** tab, you can link a list of persons to a rule. Only then, it is considered by theRule interpreter. In this way you create rules that route calls from specific subscribers to the device you defined for this purpose.

Invoking the dialog

In the main menu, select **menu > Rules ...**. The configuration dialog **Rules** 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.

Operating elements in the "List of persons" section

This section may look like this, for example:

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 are integrated automatically that you have defined as forwarding destinations for the **Action** rule setting on the **New/edit** tab.

  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 (e. g. 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.

Operating elements in the "Persons from list" section

This section may look like this, for example:

The following operating elements are available in the **Persons from list** section:

- - Click this button to integrate determined 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.
- Checkbox 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 determined person and add him/her subsequently to the current list of persons. The following dialog opens:

In the following input fields, enter the desired search criteria:

Name	Search for a person via his/her last name
First name	Search for a person via his/her first name
Telephone	Search for a person via his/her phone number
Address group	If you have grouped your contacts in address groups, you can enter here the address group the person you are looking for belongs to.
Address book	Specify here the address book in which you want 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 Lookup person dialog that opens.

– - Click this button to save the contact entries found locally on your computer.

  - - Click this button to print the contact entries found in table 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. Use the following dialog that opens to define for a new person entry a display name, a phone number and an e-mail address.

- - Click this button to modify an existing person entry.
- - Click this button to remove a person entry from the list of persons.
- **New** - Click this button to create a new person entry.
- **Undo** - Click this button to undo the changes made to a person entry.

6.3.12 "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 is considered by theRule interpreter.

Invoking the dialog

In the main menu, select **menu > Rules ...**. 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.

Operating elements in the "Date list" section

This section may look like this, for example:

The following operating elements are available in the **Date list** section:

- Ai - 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.

Operating elements in the "Date information from list" section

This section may look like this, for example:

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:

To set the date, the following operating elements are available:

- Display name - In this input field, enter an expressive name for the date entry.
- from - In this calendar, the current date is marked by default by a light blue rectangle. 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 checkbox is not activated and the calendar data in this section are hidden. Activate this checkbox to show this calendar. Select the desired date in this calendar to define the end date for the date list or rule. It is marked by a dark blue rectangle in the calendar and appears next to the **to** label.
- ← - Move one month back
- → - Move one month forward
- ✥ - Return to the current month
- « - Move one year back
- » - Move one year forward

- - Click this button to edit the configured date.
- - Click this button to edit the defined time range.
- - Click this button to modify an existing date entry.
- × - Click this button to remove a date entry from the date list.
- **New** - Click this button to create a new date entry.
- **Undo** - Click this button to undo the changes made to a date entry.

> ***NOTICE:*** The **Undo** button is inactive until you define a date entry for the selected date list.

6.3.13 "Info" Tab

This tab provides information on general procedures for creating and activating rules and profiles.

You reach the **Info** tab via the **main menu > menu > Rules ...**.

7 Voicemail Settings

After you have invoked the **Voicemail...** option from the **menu**, you can perform settings for the voicemail system.

The dialog for configuring the voicemail settings opens.

Via the navigation bar at the left hand side you can open the configuration pages for the voicemail system. The following configuration pages are available:

- **User data**
- **Voice mail system**
- **Forward access**
- **Groups**
- **Time profiles**
- **Recordings**

7.1 User Data

On the **User data** page you can see information about your user account.

You open this setting 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. Therefore the following data fields are provided: **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 where you enter phone numbers yourself (e.g. 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 respectively updates the **User data** page.

7.1.1 How to Configure a Mailbox Deputy

To configure a mailbox deputy proceed as follows:

Step by Step

1) Open the settings page for the user data via **menu > Voicemail > User data**.

2) Click on the button next to the **deputy** field.

Another window with a list of all users opens.

3) Select a user in this window. Click on the corresponding user ID.

The window closes and the selected name will be entered in the **Deputy** field.

NOTICE: If you know the deputy's user ID, you can enter him/her directly in the **Deputy** field.

4) Click the **Save** button.

NOTICE: Remove the name from the **Deputy** field to deactivate the mailbox routing.

7.1.2 How to Select a Language (for the Voicemail System)

If you wish to configure a language for the default greetings of your voicemail system that differs from the one of your operating system, proceed as follows:

Step by Step

1) Open the setting page for the user data via **menu > Voicemail > User data**.

2) Click on the **Language selection (for voice mail system)** combo box.

The list of available languages is displayed.

3) Select the desired language.

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

The page is updated and displayed in the set language.

7.2 Voice Mail System

On this page you can make different settings for your personal voice mailbox.

NOTICE: Please note that modifications will not become active until you click the **Save** button at the end of the page.

You open this setting 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 *OpenScape Xpressions 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**
  It is possible to enable callers 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 the telephone.
- **Simplified greeting configuration**
  Two time profiles are available for the voicemail system:
  - The time profile for the simplified greeting configuration that is the default when you log on to the system. The simplified greeting configuration allows only using 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.

This must be recorded as a special 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 definition of forwarding.

- **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 read notifications. Read 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 the settings for e-mail announcements. 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. Normally, the default values are sufficient.
  Using cell phones the sensitivity may have to be upgraded since cell phone connections are sometimes not free from volume fluctuations.

  NOTICE: Further information about the *EVO* voicemail system is provided in the product's user manual.

7.2.1 How to Change the PIN

How to change the PIN for accessing your own *OpenScape UC Application* voicemail box:

Step by Step

1) Open the settings page for the voicemail system via **menu > Voicemail... > Voice mail system**:
2) Click the **Change** button next to **Change PIN**.

   The following window opens.

3) Enter a new PIN in the **New PIN** field and repeat the entry in the **Confirm new PIN** field.

4) In the **User password** field enter your current password that you also use for logging on to the *OpenScape UC Application*.

5) Click 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.

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6) Click on the **Next** button.

The window closes and the new PIN is immediately valid.

7.2.2 How to Select User Prompts

How to select the user prompt type for your voicemail box and define the relative playback volume:

Step by Step

1) Open the settings page for the voicemail system via **menu > Voicemail... > Voice mail system**:

2) Click in the **User prompts** combo box and select whether to use standard or abbreviated user prompts.

3) Set the **playback volume**. The default setting is level 5.

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

Your modifications are saved.

7.2.3 How to Define Caller Options

How to offer callers the option to label the left message as urgent:

Step by Step

1) Open the settings page for the voicemail system via **menu > Voicemail... > Voice mail system**:
2) In the **Caller options** section select the **Callers can leave urgent messages** option.
3) Click on the **Save** button.

   Your modifications are saved.

7.2.4 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** checkbox.
3) Click on the **Save** button.

   Your modifications are saved.

7.2.5 How to Define Call-Forwarding Keys

How to define a key the caller may use for triggering a forwarding:

Step by Step

1) Open the setting 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 field **Number to dial**.

NOTICE: The phone numbers are generally copied from the database. Only for the cases where you have configured a forwarding to a phone number that you have defined freely you need to enter it in the **Number to dial** field.

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6) Click the **Save** button.

Your settings are saved.

NOTICE: Be sure to inform callers of 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 page **Voice mail system** shows under **Mobility number** the key number for the forwarding to the **mobility number** and the destination number.

7.2.6 How to Set a Personal Message Filter

How to set your personal message filter:

Step by Step

1) Open the settings page for the voicemail system via **menu > Voicemail... > Voice mail system**:

2) Click on the **Edit personal filter** button to specify details for the playback filter.

   The following page opens:

3) Select an **inbox folder** if necessary.

4) Select a filter option under **Message type**. The **No messages** option locks this message type so that it is not considered for playback.

   NOTICE: Only message types that exist in the system can be selected. The message type **Voicemail** is always available.

5) Click on the **Save** button at the bottom margin of the page.

   Your settings are saved.

7.2.7 How to Set the Speech Recognition Volume

To set the speech recognition volume proceed as follows:

Step by Step

1) Open the settings page for the voicemail system via **menu > Voicemail... > Voice mail system**:

2) Click the **Edit** button next to the entry **Automatic speech recognition**.

The following page opens:

3) Set the volume here via the two combo boxes, separately for **If call from normal phone** and **If call from mobile phone**.

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

Your settings are saved.

7.3 Forward Access

Specify the different variants (actions) and phone keys for forwarding on the **Forward Access** page. First of all, you can decide which call type you wish to forward, for example, **Internal calls**, **External calls** or **After-hours greeting**. If you select **Alternate greeting**, all incoming calls will be forwarded. Now 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.
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.

Action	Description
Skip greeting	Allows the caller to skip the welcome greeting.
Dial the number	Allows the forwarding of calls to any telephone number. If the caller pushes the corresponding phone key, the call is immediately connected to the telephone number you have specified here.
Enter the number, beginning with key	Enables the caller to call any extension. Please note that the digit you dial to invoke a specific feature is already the first digit of the dialable extension. Finish entering the digits with the [#] key.

7.3.1 Configuring 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 field **Number to dial**.

NOTICE: The phone numbers are generally copied from the database. Only for the cases where you have configured a forwarding to a phone number that you have defined freely you need to enter it in the **Number to dial** field.

5) Click **Save** to save your settings.

NOTICE: Be sure to inform callers of 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.

7.4 Groups

The voicemail system of the *OpenScape UC Application* enables you to quickly and easily create groups and manage them. In these groups you combine specific contacts. You can then send messages to all group members by using the group name for addressing.

You open this setting page via **menu > Voicemail > Groups**.

By default, this setting 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 can display the name specified in the **Create new group** field in the **Overview of groups**.

The new group is thus created. However, it does not contain any members yet. A click on the group name displayed as link opens a dialog that lists the single group members or in which these members can be assigned to the group.

> ***NOTICE:*** Members of a group can be single users as well as groups already defined.

With a click on the **Delete group** button you can remove a group from the list the radio button of which you have previously activated.

> ***NOTICE:*** You can see the button for deleting a group only after creating a private group. As soon as all private groups have been deleted, the **Delete group** button is hidden again.

7.4.1 How to Create a new Private Group

How to create a new private group:

Step by Step

1) Open the groups-setting page via **menu > Voicemail > Groups**.

2) Enter the desired group name in the **Create new group** field.

3) Click the **Create private group** button.

The new group will be created and displayed. However, it has not been assigned any members yet.

7.4.2 How to Edit a Private Group

How to assign members to a private group or edit other settings:

Step by Step

1) Open the groups-setting page via **menu > Voicemail > Groups**.

2) Click on the **Display name** of the group you wish to edit.

> ***NOTICE:*** If you select a group for which have no privilege, only the current settings are displayed, however, you may not carry out modifications. The **Save**... buttons and the group of the available users and groups are hidden.

The following page opens where you can execute the desired editing steps.

7.4.2.1 How to Admit Users to a Private Group

Prerequisites

- You are configured on the voicemail system as user.
- You have already created the desired private group.

How to integrate contacts as members in a previously defined private group:

Step by Step

1) Open the groups-setting 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, e.g. 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 insert 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 (e.g. e-mail addresses) under **Alternate addresses** and click the **<<** button to add these to the group.

12) Click on the **Back** button.

Your settings are saved. The **Groups** setting page is displayed.

7.4.2.2 How to Remove Users from a Group

To remove a user from a group proceed as follows:

Step by Step

1) Click on the entry in the **members** list that you want to remove.

> ***NOTICE:*** Keep the **[Ctrl]** key pressed to select several entries at a time if required.

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

The user has now been removed from the group. He/she is no longer itemized in the **Members** list.

7.4.2.3 How to Record a Group Name

Prerequisites

- You are configured on the voicemail system as user.
- You have already created a private group.

How to record a group name as greeting:

Step by Step

1) Open the groups-setting 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) Afterwards, 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 checkbox ticked off.

NOTICE: The group name recording procedure is identical with the recording procedure.

7.4.3 How to Delete a Group

How to remove a private group from the list of groups:

Step by Step

1) Open the groups-setting page via **menu > Voicemail > Groups**.
2) Click the option field that precedes the desired group to select it.
3) Click the **Delete group** button. A security check will appear.
4) Confirm the security check.

The selected group has been deleted.

7.5 Time Profiles

With the 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** that is the default when the program starts. The simplified greeting configuration allows only using one greeting per greeting type and working day.
- The time profile for the **advanced greeting configuration**. Via this it is possible to configure the greetings of the greeting types for each working day separately.

7.5.1 Time Profile for the simplified Greeting Configuration

In the simplified greeting configuration you can globally specify the greetings to be used only once. These settings then apply for all weekdays for which you have released the greetings.

You can configure the following settings for the simplified greeting configuration:

- **Message recording not allowed**
  If this option is activated, only a greeting text is played for 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 checkbox 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 (e.g. within your company).
- **External**
  Select here the greetings to be played if the received call is an external one (e.g. a call from the public telephone network).
- **Busy**
  Select here the greeting to be played if your telephone is busy when a call is received.

- **After-hours greeting**
  Select here the greeting to be played if a call is received outside the set business hours.

Click on **Save** to save your settings.

7.5.2 Time Profile for the Advanced Greeting Configuration

The advanced time-profile allows making individual settings for each weekday.

You can create an individual time profile for each weekday by assigning the settings to the corresponding greetings in a column each, respectively by selecting the corresponding greeting options.

You can use the following options and perform the following greeting settings:

- **Message recording not allowed**
  If this option is activated, only a greeting text is played for 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 checkbox 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 (e.g. within your company).
- **External**
  Select here the greetings to be played if the received call is an external one (e.g. a call from the public telephone network).
- **Busy**
  Select here the greeting to be played if your telephone is busy when a call is received.

- **After-hours greeting**
  Select here the greeting to be played if a call is received outside the set business hours.

Click on **Save** your settings.

7.5.3 How to Select the Greeting Configuration

Proceed as follows to switch from a simplified greeting configuration to the enhanced greeting configuration.

Step by Step

1) Open the settings page for the voicemail system via **menu > Voicemail > Voice mail system**:

2) Untick in the checkbox **Use simplified greeting configuration**.

3) Click on the **Save** button at the bottom margin of the page.

Your modifications are saved.

7.5.4 How to Create a time Profile for the Simplified Greeting Configuration

How to create a time profile for the simplified greeting configuration:

Step by Step

1) Open the settings page for the voicemail system via **menu > Voicemail > Voice mail system**:

2) Tick the check box **Use simplified greeting configuration**.

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 option **Message recording not allowed**.

6) Set whether the caller may interrupt the greeting. Activate or deactivate the option **Greeting cannot be interrupted**.

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** checkbox you can copy the system default settings.

> ***NOTICE:*** If you select this option, all other selection and setting options on this page become inactive.

11) Click on the **Save** button.

A confirmation message informs you that your settings have been backed up.

Creating a time profile for the simplified greeting configuration is now complete.

7.5.5 How to Create a Time Profile for the Advanced Greeting Configuration

How to create a time profile for the enhanced greeting configuration:

Step by Step

1) Open the settings page for the voicemail system via **menu > Voicemail > Voice mail system**:

2) Untick in the checkbox **Use simplified greeting configuration**.

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 option **Message recording not allowed**.

6) Set whether the caller may interrupt the greeting. Activate or deactivate the option **Greeting cannot be interrupted**.

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** checkbox you can transfer the Monday settings to all other days. If you do not select this option, you need to perform the steps 5 to 8 for each weekday.

10) Via the **Use default system settings** checkbox you can copy the system default settings.

> ***NOTICE:*** If you select this option, all other selection and setting options on this page become inactive.

11) Click the **Save** button.

A confirmation message informs you that your settings have been backed up.

Creating a time profile for the advanced greeting configuration is now complete.

7.6 Recordings

On the configuration page **Recordings** the recordings that are available for the user are displayed. These recordings are assigned to the different call types via the 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** setting page.

You open this setting page via **menu > Voicemail > Recordings**.

Different user types are provided with different recording types:

- **Standard user**
  - **Welcome greeting**
    Recordings of this type are only displayed if they have been created by an administrator or company.
  - **Standard user greeting**
    Recordings of this type are only displayed if they have been created by an administrator or system.
  - **Private group**
    Recordings of this type are only displayed if they have been created by the user. Greetings of this type can only be created if a private group has been previously generated.
  - **Personal name recording**
    Recordings of this type are only displayed if they have been created by the user.

  - **Personal greeting**
    Recordings of this type are only displayed if they have been created by the user.
- **Company**
  - **Welcome greeting**
    Recordings of this type are only displayed if they have been created by an administrator or company.
- **System**
  - **Standard user greeting**
    Recordings of this type are only displayed if they have been created by an administrator or system.
  - No recording of type “Private group” is displayed, even if the user has made such a recording.
- **Administrator**
  - An administrator may use advanced recording options.

You can use any terminal device for your recording.

NOTICE: If your administrator has created and configured global greetings (company greetings), they will be replaced by your personal greeting.

7.6.1 How to Record and Edit Greetings

How to record or modify a personal greeting:

Step by Step

1) Open the **Recordings** setting 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.

---

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 via your telephone
- **Upload recording**
  Option for using a file that exists already in your file system

6) Click on the **Create** button.

Depending on the selected method continue as described in the following.

7.6.1.1 How to Record Greetings via Telephone

If you have selected the **Record via telephone now** option under **Select a method**, proceed as follows to record a greeting via your telephone:

Step by Step

1) Enter the number of the telephone with which you want to record the greeting in the following dialog.

2) Then click on the **OK** button.

Your phone rings. As soon as you have picked up the receiver the following page is displayed:

3) Click on the **Record** button.

Recording starts.

4) Click on the **Pause** button to interrupt the recording.

The current length of the greeting is displayed on the positioning bar for your information.

5) Click the **Play** button to play back the recording and listen to your recording via the telephone handset.

6) If you are satisfied with your recording, click the **Exit** button.

The recording is saved and the **Recordings** page reappears.

7) If you would like to repeat the recording, click the left end of the positioning bar to rewind to the start of the recording and then click the **Recordings** button to restart the recording.

8) Enter a number in the input field beneath the buttons and click the **Go to position:** button to move to a specific position in the recording.

> ***NOTICE:*** If you have selected the **Auto refresh** option, the cursor will always be set to the beginning of the input box by the repeated download of the page. This complicates the input. Deactivate this option before using the time input field.

The current position is displayed in seconds via the buttons and on the positioning bar.

7.6.1.2 How to Upload an Existing Greeting File

If you have selected the **Upload recording** option under **Select a method**, proceed as follows to use an existing greeting file from your file system:

Step by Step

1) Enter the path and file name of the prepared file in the text field or find the desired file in the file system via the **Browse...** button.

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

The recording is saved and the **Recordings** page reappears.

7.6.2 How to Delete Greetings

> ***NOTICE:*** A greeting that is 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 that 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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