Documentation

OpenScape UC Application Client Applications

User Guide

A31003-S5060-U100-2-7619

Siemens Enterprise Communications
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History of Changes

Date	Changes	Reason
2011-02-21	New chapter: *OpenScape Extension for Lotus Notes*. Schedule and start conferences from a Lotus Notes Client.	V6
2011-03-28	New OpenScape Voice Portal feature: Additional options in the OpenScape Voice Portal menu "Select message types" .	V6
2011-03-28	New OpenScape Voice Portal feature: Option to force a name recording with the first logon to the OpenScape Voice Portal.	V6
2011-03-28	New OpenScape Voice Portal feature: Forwarding a message with or without comment.	V6
2011-03-02	New chapter: *OpenScape UC Speech Portal*. Voice-operated TUI to control the OpenScape UC Application functions.	V6
2011-03-03	New features when using the *OpenScape Extensions for Microsoft Outlook*: The conference starts automatically when the defined start time is reached, video conferences can be created and the call direction (the conference participants are called by the system or need to dial into the conference by themselves) can be set.	V6
2011-03-17	Setup conditions for the application *Client Integrations* (click-to-dial) supplemented.	CQ00155701
2011-03-17	Added: Description of how to delete conference entries created via the *OpenScape Extensions for Microsoft Outlook*.	CQ00150830
2011-06-29	Icon depictions and associated texts updated.	CQ00172216
2011-06-29	Added: Reference to the administrator manual for the Lotus Domino server, which describes the preparations for setting up the *OpenScape Extensions for Lotus Notes*.	CQ00172223
2011-06-29	Added: Description of the conference type **Merge Calls**.	CQ00172215
2011-06-29	Functional icon added: Request callback with busy line or no reply.	CQ00172210
2011-08-17	New feature: Logging the *OpenScape Extensions for Microsoft Outlook* on to the *OpenScape UC Application* via Windows authentication.	RQ00030616
2011-09-20	New feature: Web conferences exclusively started by the moderator or, in case of an open conference, by the conference creator.	V6
2011-09-20	New feature: Video conference moderator indicated by an icon preceding his/her name in the video screen.	V6
2011-09-20	New feature: Indication of the active speaker in a video conference.	V6
2011-12-06	Corrected: Behavior of the conference control with system calls in a moderated and scheduled conference.	CQ00189287
2011-12-07	New note: When installing *OpenScape Extensions for Microsoft Outlook* on the operating system Windows 7 the setup file `setup.exe` must not be started from the Zip archive.	CQ00185455
2011-12-07	Modification to the feature *MeetNow!* conferences: Use of *MeetNow!* conferences restricted to OpenScape users who must have a special profile (Professional and Team) in addition.	V6
2011-12-07	Modification to the feature *MeetNow!* conferences: As soon as video-compatible conference participants dial into the *MeetNow!* conference, a conference started as voice conference is transferred into a video conference.	V6
2012-03-20	New note: The OpenScape Extensions for Microsoft Outlook cannot be installed on Windows 7 from the zip file. The setup files must be unpacked first. The installation must then be performed via the context menu item “Run as administrator”.	CQ00185455
2012-03-20	Corrected description: In case of a configured dial-out, the moderator and the other conference participants are called by the system simultaneously.	CQ00202205
2012-03-20	New section: Installation control via the config.ini.	CQ00195697

Date	Changes	Reason
2012-03-20	Corrected MeetNow! conference description: MettNow!-conferences are always video-compatible. However, they do not provide the video resources until the first video-compatible user has dialed into the conference.	CQ00199386
2012-03-20	Corrected description of how the system behaves when the moderator leaves a moderated conference.	CQ00188944
2012-03-20	More information about deleting conference entries from the Outlook calendar.	CQ00188128
2012-03-20	New note for deleting conference entries in Microsoft Outlook 2003.	CQ00201341
2012-03-20	Explanation added: When the OpenScape Extensions for Microsoft Outlook have not yet logged on to OpenScape UC Application, the configuration dialog displays only the tab for logging on to the OpenScape UC Application. This explanation added for Lotus Notes likewise.	CQ00190628

1 The OpenScape UC Application Clients

This document compiles and describes all client applications available for operating the communication functions provided by the OpenScape UC Application server. The client applications that have no manual of their own are explained in detail. For all other clients you find a short feature overview and a reference to the corresponding manual.

1.1 Outline

Structure of this manual.

The instructions on hand are divided into the following chapters:

Chapter 1, "The OpenScape UC Application Clients"

In this chapter you find general information on the OpenScape UC Application communication solution as well as information on the structure and the use of this manual.

Chapter 2, "The Communications solution OpenScape UC Application"

In this chapter you find an overview of the OpenScape UC Application communications solution.

Chapter 3, "The Clients for OpenScape UC Application"

In this chapter you find a short feature overview of the clients available for OpenScape UC Application as well as information about where to find the respective manual.

Chapter 4, "The OpenScape Voice Portal"

Operating instructions for the OpenScape Voice Portal.

Chapter 5, "The OpenScape UC Speech Portal"

Operating instructions for the OpenScape UC Speech Portal.

Chapter 6, "Conferences in OpenScape UC Application"

Operating instructions for the conference function offered via the OpenScape UC Application clients (OpenScape Web Client and OpenScape Desktop Client Enterprise Web Embedded Edition).

Chapter 7, "OpenScape Extensions for Microsoft Outlook"

Operating instructions for the Microsoft Outlook conference extension of the OpenScape UC Application.

Chapter 8, OpenScape Extensions for Lotus Notes"

Operating instructions for the Lotus Notes conference extension of the OpenScape UC Application.

Chapter 9, "OpenScape Desktop Integration"

Description of how to set up and operate the application program DesktopInte-gration.

Chapter 10, "OpenScape Click-to-Dial-Browser-Plug-in"

Operating instructions for the OpenScape Click-to-Dial-Browser-Plug-in.

Chapter 11, "OpenStage Client"

Operating instructions for the OpenStage Client.

Chapter 12, "The OpenScape Client Integrations"

Feature overview and installation manual for the OpenScape Client Integrations.

Chapter 13 "OpenScape icons"

In this chapter we provide information about the icons used in the OpenScape UC Application clients.

1.2 Working with this Manual

Basic information about how to use this manual.

1.2.1 Formats and Display Forms

In the manual on hand the following conventions apply:

Purpose	Representation	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** > **Close**
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:\Programs\...`
		or
		`Example.txt`

Variables	Italic in angle brackets	Enter your <*user name*> and the <*password*> to log on to the system.
Output	Font with fix character spacing, e. g. Courier	`Command not found`.
Entry	Font with fix character spacing, e. g. Courier	Enter `LOCAL` as file name
Key combination	Bold	[**Ctrl**]+[**Alt**]+[**Esc**]
Steps and subordinate steps in instructional text	Numeric and alpha-betic lists	1. Configure the RADSL telephony subscribers with the respective extensions. a) Click on Add. b) Enter the name of the RADSL telephony subscriber under RADSL telephony subscriber.
Listings of functions etc.	Bulleted list	• If you would like to issue amounts, activate the checkbox Issue amounts instead of units. • If you would like to issue units, deactivate the checkbox Issue amounts instead of units.

NOTICE: Indicates useful notes.

IMPORTANT: Indicates situations that may result in damage to property and/or loss of data.

1.2.1.1 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.

1.2.2 Reference Manuals

This section informs you about additionally available user documentation on OpenScape UC Application.

The general rule is that a printed version of the manuals can only be obtained upon special request. All other documents are available on the enclosed DVD as full text search-compatible PDF version. Additionally, an online help is available for most of the components, which can be started directly from the respective programs.

The following OpenScape UC Application operating instructions are available in addition:

Manual	Topic
OpenScape UC Application OpenScape Desktop Client Enterprise Web Embedded Edition	Setup and operation guide for the OpenScape Desktop Client Enterprise Web Embedded Edition.
OpenScape UC Application OpenScape Desktop Client Enterprise Web Embedded Edition, Quick Guide	Quick guide through the OpenScape Desktop Client Enterprise Web Embedded Edition.
OpenScape UC Application OpenScape Web Client	Operating instructions for the OpenScape Web Client.
OpenScape UC Application OpenScape Web Client, Quick Guide	Quick guide through the OpenScape Web Client.
OpenScape UC Application OpenScape Mobile Client	Installation and operating guide for the OpenScape Mobile Client.
OpenScape UC ApplicationOpenScape Mobile Client, Quick Guide	Quick guide through the OpenScape Mobile Client.
OpenScape Web Collaboration V1	Operating instructions for the web conferencing application OpenScape Web Collaboration. These instructions describe basically the functional range of the *OpenScape Web Collaboration Embedded* shipped with the OpenScape UC Application.
OpenScape Web Collaboration, Quick Guide	Quick guide through the web conferencing application OpenScape Web Collaboration Embedded.

Manual	Topic
OpenScape UC Application OpenScape Voice Portal, Quick Guide	Graphic overview of the OpenScape Voice Portal main features.
OpenScape UC Application OpenScape Voice Portal mit PhoneMail	Graphic overview of the OpenScape Voice Portalfeatures that can be reached via the voicemail script OpenScape Xpressions PhoneMail.
HiPath 4000 OpenStage 60/60 G, OpenStage 80/80 G OpenStage Key Module	Operating instructions for the telephone OpenStage 60/80.

2 The OpenScape UC Application

Overview of the OpenScape UC Application clients.

2.1 Introduction

The OpenScape UC Application communications solution – “UC” means Unified Communications here – enables you to reach people fast and smoothly, or to access important information. When using the OpenScape UC Application in the Enterprise Edition it does not matter from where you set up the connection or retrieve information: in the office, at home or on the road. This software solution is provided on a server and can be used by multiple users at the same time. The Personal Edition provides mostly the functionality of a softphone without using the server of the Enterprise Edition.

2.1.1 Main Features

Overview of the main features.

The OpenScape UC Application simplifies your business communication by summarizing all access and operating elements in one application. The following table lists the main features of the OpenScape UC Application with the respective clients that enable using these features:

		Clients				
Feature	**Description**	**Desktop**	**Web**	**Mobile/ OpenStage 60/80**	**Voice portal[1]**	**Outlook/ Lotus Notes**
Presence-based contact management	Enables you to view information on presence and availability in real time and provide it for your colleagues. Additionally, calls via the contact list are possible.	X	X	X	X	
One-number service (ONS)	You can issue a single telephone number via which you can be reached. You can make and take calls at a device different from your office phone (i. e. your preferred device). For outgoing calls, your office phone number is always transferred as caller number.	X	X	X	X	
Using routing rules	You can define several private routing rules for your incoming calls and select one of them if required.	X	X	X [2] /-	X[3]	

		Clients				
Feature	**Description**	**Desktop**	**Web**	**Mobile/ OpenStage 60/80**	**Voice portal[1]**	**Outlook/ Lotus Notes**
Softphone	Integrated SIP softphone with the feature of making local calls. **Note**: The feature SIP-Softphone is not available for terminal server clients. Integrated softphone with the feature of making local calls with HFA connection to the HiPath 4000.	X				
Information feature (Tell-me-when)	Sends a notification when a contact is available.	X	X			
Audio conferencing service	Supports you in performing meet-me conferences (dial-in conferences) or ad-hoc conferences without previous dial-in or registration procedures.	X	X	X	X	
Video conferences	Allows performing video conferences if video-compatible devices/clients are used.	X	X			X
Text-to-speech	Text messages are converted to speech that can then be played via a voice device.				X	
Directory search	Server-based directory access (LDAP)	X	X	X		
Journal with number resolution	Logs all incoming and outgoing calls. Allows sorting and grouping calls as well as initiating outgoing calls by clicking on a name or number.	X	X	X		
Instant messages	Native client support for instant messages based on extensible messaging and presence protocol (XMPP) allows using existing Enterprise instant-messaging platforms such as Openfire or Jabber XCPTM.	X	X			
Managing preferred devices (One-Number Service, ONS)	Enables using several devices and device lists for incoming and outgoing calls via the one-number service.	X	X	X	X	
Named device list	Enables naming a selected device list. The device list can be assigned to a status to attribute calls in a certain order or to certain devices.	X	X			

		Clients				
Feature	**Description**	**Desktop**	**Web**	**Mobile/ OpenStage 60/80**	**Voice portal[1]**	**Outlook/ Lotus Notes**
Call screening	With the help of this control feature the name and phone number of a caller can be displayed. The name and number must be in your contact list.	X	X			
Micosoft Office Communications Server (OCS) integration	The server-based integration of Micosoft Office Communications Server enables access to your OCS contact list. You can search for OCS-based contacts and import them in the OpenScape contact list, and communicate with your contacts/colleagues via instant messaging. Your OpenScape presence status is synchronized with the OCS presence status.	X	X			
Groupware integration	The server-based integration of IBM Lotus Domino and Microsoft Exchange Server allows access to global and private contacts and address books as well as the inbox and the calendar (may vary depending on the client).	X	X		X	
Calendar integration	Accessing groupware-based calendars.				X	
Messaging integration	Integration with Microsoft and IBM messaging features.				X	
Video telephony	Video telephony via SIP.	X				
Desktop integration	Easy-to-start application that provides the following features: • Calling subscribers from any application via copying the phone number to the clipboard. • Signaling of incoming calls and instant messages, even if the windows of the OpenScape Web Client or of the OpenScape Desktop Client are closed.	X	X			
Browser integration	The OpenScape Click-to-Dial-Browser-Plug-in for the Microsoft Internet Explorer enables dialing a phone number from your web browser.	X	X			

		Clients				
Feature	**Description**	**Desktop**	**Web**	**Mobile/ OpenStage 60/80**	**Voice portal[1]**	**Outlook/ Lotus Notes**
Single Sign-On (SSO)	Logging on to the clients installed on your workstation via your local Windows account.	X	X			
Client logon via your Windows user account.	Logging on to clients via Windows user account			X/-		X
Microsoft Outlook Integration - address data export and import	You can export and import your contact data as Microsoft Outlook-based contacts.	X	X			
Microsoft Outlook Integration - Telephone Service Provider support (TSP)	TSP support enables direct calling from selected e-mails or address book entries in Microsoft Outlook. The associated contacts need to have been assigned a phone number for this purpose.					X
Microsoft Outlook/Lotus Notes integration - planning conferences via the calendar of Microsoft Outlook or of Lotus Notes.	Installing the OpenScape Extensions for Microsoft Outlook/ OpenScape Extensions for Lotus Notes provides functions in Microsoft Outlook/Lotus Notes for scheduling conferences via a meeting request in the calendar of Microsoft Outlook/Lotus Notes.					X

1 When using the voice portal in Direct Access; in Guest Access you can only leave a voicemail (answering machine function).
2 Activating only one of the already defined rules from the rule list.
3 Activating only one of the already defined rules from the rule list.

2.1.2 Main Concepts

The main concepts of the OpenScape UC Application.

Working with OpenScape UC Application is based on the following concepts.

- Your status information - the basis for ideal communication
  OpenScape UC Application uses your status to determine how the communication is to take place. Your colleagues can always immediately see whether you are available, in a meeting or busy.

  NOTICE: Of course, you can specifically prohibit displaying your status information for individual subscribers.

  Always remember to define your status and to update it regularly.
  In a deployment with Micosoft Office Communications Server integration the presence status is exchanged between the systems and always corresponds to the status you have set last, no matter whether you have specified it in the OpenScape UC Application or in the Micosoft Office Communications Server.
- Your contacts - a list of colleagues, customers, family participants and friends.
  You can configure your contacts to gain a quick overview of your status and to facilitate selecting the most appropriate communications medium. This is particularly useful if your contacts are other OpenScape UC Application users, since you have then the best possible overview of your communications options. You can also configure contact persons as groupware contacts without OpenScape UC Application. Integrating people you contact frequently in your contact list simplifies your work significantly.
- Your devices - You determine them, theOpenScape UC Application keeps track.
  You choose the devices via which you take calls and that you would like to use to make calls. The status of all your devices is tracked for every communication starting from your OpenScape UC Application clients and is used for the corresponding routing of incoming calls. Your office telephone status or your softphone status can also be tracked if you make calls directly from the telephone.
- Access to the effective features of the OpenScape UC Application
  The OpenScape Desktop Client (Personal Edition as well as OpenScape Desktop Client Enterprise Web Embedded Edition is your desktop application. It provides trouble-free communication and cooperation with others from your desk with each of your telephones, your integrated softphone included.
  You can use the OpenScape Desktop Client for easy access to the OpenScape UC Application via an internet browser.
  The OpenScape Mobile Clientenables access to the OpenScape UC Application via mobile phone.
  You can use the OpenScape Voice Portal to access the OpenScape UC Application via keypad (Dual Tone Multi Frequency - DTMF).

2.1.3 Microsoft Groupware and Office Integration

Collaboration with Microsoft Groupware and Microsoft Office.

The OpenScape UC Application supports copying Outlook contacts so that you can use your contacts from the OpenScape UC Application clients. This must be configured by your system administrator.

If your system administrator does not configure copying your Outlook contacts as OpenScape UC Application contacts, the Outlook and OpenScape UC Application contacts are managed on the respective servers separately. However, you may copy Outlook contacts to your OpenScape UC Application contact list.

The Microsoft Office integration with the OpenScape UC Application enables you to:

- Integrate any of your Outlook contacts in your OpenScape UC Application contact list.
- Add contacts from the global Microsoft Exchange address book (global address list, GAL).
- Call a contact directly from Outlook.
- Send an e-mail to a person of your OpenScape UC Application contact list by clicking on the e-mail icon next to the desired entry.
- Receive your voicemail directly in your e-mail inbox.
- Administer your inbox, your calendar and your voicemails by telephone.

2.1.4 IBM Lotus Groupware Integration

Collaboration with IBM Lotus Groupware.

Your Lotus Notes contacts are separated from your OpenScape UC Application contacts, since they can only be maintained in the third-party system. However, you may copy Outlook contacts to your OpenScape UC Application contact list.

The IBM Lotus Notes integration with the OpenScape UC Application enables you to:

- Integrate any contacts from your Lotus Notes address book in your OpenScape UC Application contact list.
- Call a contact directly from Lotus Notes.
- Receive your voicemail directly in your e-mail inbox.
- Administer your inbox, your calendar and your voicemails by telephone.

2.1.5 Microsoft Office Communications Server (OCS) Integration

Collaboration with Microsoft Office Communications Server.

Your OCS contacts are separated from your OpenScape UC Application contacts and are only maintained in the third-party system. However, you may copy OCS contacts to your OpenScape UC Application contact list. You cannot save OpenScape UC Application contacts from the Microsoft Office Communications server.

The Micosoft Office Communications Server integration with the OpenScape UC Application enables you to:

- Integrate any contacts from your OCS address book in your OpenScape UC Application contact list.
- Use your OpenScape UC Application or OCS presence status for ideal communication with your contacts/colleagues.
- Communicate in an easy and safe way with your contacts/colleagues via instant messaging.

3 Overview of the OpenScape UC Application

The clients for operating the OpenScape UC Application features.

The following clients are available for the OpenScape UC Application communications system:

- OpenScape Desktop Client Enterprise Web Embedded Edition
- OpenScape Web Client
- OpenScape Mobile Client
- OpenScape Voice Portal
- OpenScape UC Speech Portal
- OpenScape Extensions for Microsoft Outlook
- OpenScape Extensions for Lotus Notes
- OpenScape Desktop Integration
- OpenScape Click-to-Dial-Browser-Plug-in
- OpenStage Client
- OpenScape Client Integrations

3.1 OpenScape Desktop Client Enterprise Web Embedded Edition

OpenScape Desktop Client Enterprise Web Embedded Edition Features

NOTICE: Operating the OpenScape Desktop Client Enterprise Web Embedded Edition is described in the OpenScape UC ApplicationOpenScape Desktop Client Enterprise Web Embedded Editionmanual.

The OpenScape Desktop Client Enterprise Web Embedded Edition enables you to reach people fast and smoothly, or to access important information - regardless of whether you are in the office, at home, or on the road. This software solution is provided on a server and can be used by a lot of people at the same time. The client uses the Intranet connection to this server and provides a wide range of features.

The OpenScape Desktop Client Enterprise Web Embedded Edition offers the following features among other things:

3.1.1 Own Calls

Feature: **Own Calls**.

With the help of several icons you can make calls, configure conferences and track your current device status.

3.1.2 Conferencing

Feature: **Conferencing**.

You can quickly and easily initiate ad-hoc conferences, start and administer pre-configured meet-me conferences and schedule and configure future conferences. The OpenScape Desktop Client Enterprise Web Embedded Edition allows connecting up to 300 users in a voice conference.

3.1.3 Contact List

Feature: **Contact List**.

You administer your contacts here and can check whether a contact can be reached via telephone, e-mail or instant message.

3.1.4 Own Status

Feature: **Own Status**.

Here you can enter your status, so that the OpenScape UC Application can determine the most suitable way of communication based on your presence information. In a Micosoft Office Communications Server integration the OpenScape UC Application automatically copies the presence status defined there.

3.1.5 Preferred Device

Feature: **Preferred Device**.

Here you can specify which of your voice devices (landline telephone, cell phone, private phone etc.) OpenScape UC Application is to use for incoming and outgoing calls.

3.1.6 Instant Messaging (IM)

Feature: **Instant Messaging**.

Using instant messaging you can send text messages to OpenScape users who are currently online. Delivery takes place directly when sending the message so that your colleague may react and answer immediately.

3.1.7 Journal

Feature: **Journal**.

Here you can log all incoming and outgoing calls, even if you are offline.

3.1.8 Video Conferencing

Feature: **Video Conferencing**.

Setting up video conferences to other OpenScape users.

3.2 OpenScape Web Client

OpenScape Web Client Features

> ***NOTICE:*** Operating the OpenScape Web Client is described in the OpenScape UC ApplicationOpenScape Web Clientmanual.

The OpenScape Web Clientis a server-based CTI solution for the intranet. The software installation and configuration takes places centrally on the server. User-related journal data and settings are stored on the server, too. 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 since the user data is centrally saved on the server.

The OpenScape Web Clientis a CTI client with a connection to the PBX HiPath 4000. It uses the internet connection to the OpenScape UC Application.

A web browser is sufficient for invoking the OpenScape Web Client. Thus, the installation on your workstation that is usually necessary for clients does not apply. The quick and simple distribution in the intranet is thus ensured and the OpenScape Web Client can be immediately used at each computer in the intranet.

The OpenScape Web Client offers the following features among other things:

3.2.1 Own Calls

Feature: **Own Calls**.

With the help of several icons you can make calls, configure conferences and track your current device status.

3.2.2 Conferencing

Feature: **Conferencing**.

You can quickly and easily initiate ad-hoc conferences, start and administer pre-configured meet-me conferences and schedule and configure future conferences. The OpenScape Desktop Client Enterprise Web Embedded Edition allows connecting up to 300 users in a voice conference.

3.2.3 Contact List

Feature: **Contact List**.

You administer your contacts here and can check whether a contact can be reached via telephone, e-mail or instant message.

3.2.4 Own Status

Feature: **Own Status**.

Here you can enter your status, so that the OpenScape UC Application can determine the most suitable way of communication based on your presence information. In a Micosoft Office Communications Server integration the OpenScape UC Application automatically copies the presence status defined there.

3.2.5 Preferred Device

Feature: **Preferred Device**.

Here you can specify which of your voice devices (landline telephone, cell phone, private phone etc.) OpenScape UC Application is to use for incoming and outgoing calls.

3.2.6 Instant Messaging (IM)

Feature: **Instant Messaging**.

Using instant messaging you can send text messages to OpenScape users who are currently online. Delivery takes place directly when sending the message so that your colleague may react and answer immediately.

3.2.7 Journal

Feature: **Journal**.

Here you can log all incoming and outgoing calls, even if you are offline.

3.3 OpenScape Mobile Client

OpenScape Mobile Client Features

> ***NOTICE:*** Operating the OpenScape Mobile Client is described in the OpenScape UC ApplicationOpenScape Mobile Clientmanual.

The OpenScape Mobile Client allows cell phone users to deploy presence-based contact lists and conference teamwork features via remote access.

The following mobile devices are supported:

- Blackberrys
- Nokia mobile phones of the E series
- Mobile devices with Windows operating systems
- Apple iPhone
- Mobile devices with the Android operating system

> ***NOTICE:*** You find current and detailed information about the supported mobile devices and their operating systems in the *OpenScape UC Application Planning Guide* manual.

After the installation of the required applet on the mobile devices the available features are offered via a main menu.

The status bar at the lower margin of the monitor displays the current user, the selected device and the network status.

You can access the following features via the OpenScape Mobile Client:

3.3.1 Calling

Feature: **Calling**.

This feature allows dialing a phone number not entered in your contact list.

3.3.2 Handover to

Feature: **Handover to**.

Using this feature you can transfer an existing connection to another device assigned to you or to another extension. This extension can be yours or that of another person.

3.3.3 Contacts

Feature: **Contacts**.

You can open your contact list and create, edit or delete contacts.

3.3.4 Journal

Feature: **Journal**.

The last 20 incoming, outgoing and missed calls can be displayed.

3.3.5 Devices

Feature: **Devices**.

You can open your device list and add, modify or delete devices. Additionally, you can select a device as preferred device.

3.3.6 Updating

Feature: **Updating**.

You can use this feature to update the display.

3.3.7 Setting a Status

Feature: **Setting a Status**.

You can call your status options list for your presence display and change your presence status.

3.3.8 Setting a Rule

Feature: **Setting a Rule**.

You can activate or deactivate call handling rules.

3.3.9 Settings

Feature: **Settings**.

You can define call handling rules, have user information displayed and view an error log.

3.3.10 Subscriptions

Feature: **Subscriptions**.

> ***NOTICE:*** This feature is available with *Apple iPhone* and *Android* only.

You can use this feature to answer and manage requests by OpenScape users as regards your phone and presence status being displayed to them. Such requests are generated in the OpenScape Desktop Client Enterprise Web Embedded Edition or in the OpenScape Web Client and can also be answered and managed via the OpenScape Mobile Client.

3.4 OpenScape Voice Portal

OpenScape Voice Portal Features

> ***NOTICE:*** You find a detailed description of how to operate the OpenScape Voice Portal in another passage of this manual.

The OpenScape Voice Portal can be used from any phone. It uses the connection of cable connected telephones to OpenScape UC Application. To this, the OpenScape VoiceHiPath 4000 PBX must have been installed in your OpenScape UC Application environment. You can access the OpenScape Voice Portal via telephone keypad and deploy its features.

The OpenScape Voice Portal supports the following categories of features:

- Logging on to the system and accessing the main menu
- Via the **Mailbox menu**:
  - Sending voicemails
  - Playing messages
  - Selecting message types
  - Switching message directories
- Via the **Calendar menu**:
  - Accessing the *Microsoft Outlook* and *Lotus Notes* calendar feature
- Via the **Conferences menu**:
  - Joining a conference
  - Starting a conference
- Via the **Settings** menu:

  - Configuring the answering options. These include recording welcome greetings and the individual name.
  - Setting voicemail options. Via this you can change your password and administrate your trusted numbers that enable simplified system access.
  - Setting the Unified Communications options. In this menu you can change your presence status, set your preferred device and select a routing rule for incoming calls.
  - Editing your contacts. Via this you can name dial a contact or retrieve the presence status of a selected contact.
- Via the **Call subscriber** menu:
  - Calling a subscriber directly (entering the phone number) or via name dialing (entering the contact name).
- Via the **Help** menu detailed help greetings for the main menu are played.

NOTICE: A help feature is available for all menus via which you can play detailed help greetings to every menu you are currently in.

3.4.1 OpenScape Voice Portal mit PhoneMail

OpenScape Voice Portal mit PhoneMail Features

NOTICE: You find a detailed description of how to operate the OpenScape Voice Portal mit PhoneMail in another passage of this manual.

You can reach various OpenScape Voice Portal functions also via the OpenScape Xpressions PhoneMail telephone interface, if an OpenScape XpressionsOpen-Scape UC Application

The following OpenScape Voice Portal features are then additionally available to PhoneMail users:

- Access to the OpenScape UC Application function **Conferencing** with the features:
  - Joining a conference
  - Starting a conference
- Providing the OpenScape UC Application function **Unified Communications Options** with the features:
  - Accessing the **Calendar menu**. The **Calendar menu** offers access to the calendar features of *Microsoft Outlook* and *Lotus Notes*.
  - Accessing your presence status settings for changing your presence status.
  - Accessing the settings of your preferred device

  - Accessing the routing rules for activating one of the routing rules you have defined.

3.5 OpenScape UC Speech Portal

General description of the OpenScape UC Speech Portals.

The OpenScape UC Speech Portal is the telephone user interface (TUI) for the OpenScape UC Application which is operated via voice commands. Thus, you can access the OpenScape UC Application features by spoken commands.

Your spoken commands are converted to control commands via a speech recognition software installed on the server.

> ***NOTICE:*** The speech recognition software is currently only available for English and German.

The feature range is to a large extent identical to the OpenScape Voice Portal feature range. In addition to the features available in OpenScape Voice Portal, the following actions can also be performed:

- Creating calendar entries
- Performing ad-hoc conferences

You can use the following OpenScape UC Application features by spoken commands:

- **In the Control Mode** (Direct Access), you have the following options after having logged on to the system:
  - Editing your messages
  - Accessing your calendar and creating calendar entries
  - Joining a conference, starting a conference and performing an ad-hoc conference
  - Changing your system settings
  - Calling any subscriber
- **In the Answering Machine Mode** (Guest Access), you may:
  - Create you personal answering machine by configuring a call diversion to the Answering Machine Mode. Furthermore, you can call the Answering Machine Mode directly from any phone and record voicemails for the OpenScape subscribers and store the messages in their mailbox.

> ***NOTICE:*** The Control Mode and the Answering Machine Mode can be reached by dialing different access numbers.

The OpenScape UC Speech Portal can be reached and used from any phone.

Your system administrator provides the code numbers for logging on to the OpenScape UC Speech Portal:

- Your access number for the OpenScape UC Speech Portal Control Mode.

- Your account number for the Control Mode.
- Your password (PIN) for the Control Mode.
- Your access number for the OpenScape UC Speech Portal Answering Machine Mode.

NOTICE: If voice commands are not recognized by the system, it will allow you after a number of failed attempts to trigger selected actions by using the telephone keypad. The available options will be announced for the corresponding menu.

3.6 OpenScape Extensions for Microsoft Outlook

OpenScape Extensions for Microsoft Outlook Features

NOTICE: Please refer to other passages in this manual for the setup, configuration and operation of OpenScape Extensions for Microsoft Outlook.

The OpenScape Extensions for Microsoft Outlook for the OpenScape UC Application server facilitates scheduling and monitoring conferences.

This function provides the following features via the calendar function of Microsoft Outlook:

- Scheduling an audio conference (telephone conference).
- Automatic start of the audio conference at the defaulted time (scheduled conferencing).
- Scheduling and initiating a web conference.
- Scheduling a video conference

You can additionally configure the following feature via the OpenScape Extensions for Microsoft Outlook configuration settings:

- Synchronizing your OpenScape presence status based on the *Microsoft Outlook* calendar data.

3.7 OpenScape Extensions for Lotus Notes

OpenScape Extensions for Lotus Notes Features

NOTICE: Please refer to other passages in this manual for the setup, configuration and operation of OpenScape Extensions for Lotus Notes.

The OpenScape Extensions for Lotus Notes for the OpenScape UC Application server facilitates scheduling and monitoring conferences.

This function provides the following features via the calendar function of *Lotus Notes*:

- Scheduling an audio conference (telephone conference).
- Automatic start of the audio conference at the defaulted time (scheduled conferencing).
- Scheduling and initiating a web conference.
- Scheduling a video conference

You can additionally configure the following feature via the OpenScape Extensions for Lotus Notes configuration settings:

- Synchronizing your OpenScape presence status based on the *Lotus Notes* calendar data.

3.8 OpenScape Desktop Integration

OpenScape Desktop Integration Features

NOTICE: Please refer to other passages in this manual for the setup, configuration and operation of OpenScape Desktop Integration.

Using the information on the DesktopIntegration tab of the OpenScape Web Client you can install a small program on your workstation that allows calling a subscriber from any application.

Example:

A 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 Integrationapplication even if the OpenScape Web Client screen is closed.

In the OpenScape Desktop Integration application you can set further options for the startup behavior, the OpenScape Web Client display and the notification options.

3.9 OpenScape Click-to-Dial-Browser-Plug-in

OpenScape Click-to-Dial-Browser-Plug-in Features

NOTICE: Please refer to other passages in this manual for the setup, configuration and operation of OpenScape Click-to-Dial-Browser-Plug-in.

The OpenScape Click-to-Dial-Browser-Plug-in enables making calls by mouse-click from a web browser.

You can integrate this function in the *Internet Explorer* and optionally in the *Mozilla Firefox*.

The plug-in provides a call entry in the web browser's search engine list in addition. This enables you to enter any phone number, which is dialed via the OpenScape Web Client, in the search field of your preferred web browser via PC keyboard.

3.10 OpenStage Client

OpenStage Client Features

If the OpenStage Client application is installed on the OpenScape UC Application, you can operate important OpenScape UC Application functions that are normally used via the OpenScape Web Client, the OpenScape Desktop Client Enterprise Web Embedded Edition or the OpenScape Mobile Client via the application OpenStage Client with telephones of type OpenStage 60 or OpenStage 80.

The following OpenScape UC Application functions are supported for operation on the telephone OpenStage:

- Displaying and changing your own presence status.
- Displaying and changing the preferred device.
- Looking for contacts in available address books.
- Displaying your own contact list and calling a selected contact from there.
- Displaying your own telephone journal with the following operating options:
  - Callback to a selected entry in the caller list.
  - Filtering call entries by call event time (today, yesterday, last week, by date).
- Displaying your conferences, starting them and controlling existing conferences.

3.11 OpenScape Client Integrations

OpenScape Client Integrations Features

After installing OpenScape Client Integrations you can use the click-to-dial function independently of setting up another CTI client such as the OpenScape Desktop Client Enterprise Web Embedded Edition or the OpenScape Web Client. You can thus implement this function in many clients and use it there.

4 OpenScape Voice Portal

General description of the OpenScape Voice Portal.

The OpenScape Voice Portal is a telephone user interface (TUI) for the OpenScape UC Application. This interface lets you access the OpenScape UC Application functions via telephone keypad. In the corresponding menus, the options available are announced by the system which allows an intuitive operation.

You can use the following OpenScape UC Application features via telephone:

- **In the Control Mode** (Direct Access), you have the following options after having logged on to the system:
  - Editing your messages
  - Accessing your calendar
  - Joining or starting a conference
  - Changing your system settings
  - Calling any subscriber
- **In the Answering Machine Mode** (Guest Access), you may:
  - Create you personal answering machine by configuring a call diversion to the Answering Machine Mode. Furthermore, you can call the Answering Machine Mode directly from any phone and record voicemails for the OpenScape subscribers and store the messages in their mailbox.

  NOTICE: The Control Mode and the Answering Machine Mode can be reached by dialing different access numbers.

The OpenScape Voice Portal can be reached and used from any phone.

Your system administrator provides the code numbers for logging on to the OpenScape Voice Portal:

- Your access number for the Control Mode in the OpenScape Voice Portal.
- Your phone number for the Control Mode.
- Your password (PIN) for the Control Mode.
- Your access number for the Answering Machine Mode in the OpenScape Voice Portal.

NOTICE: If you use name dialing, special characters (ä, ö and ü) in person's names must be marked by a following “e” (numerical key 3). The name “Äuld” would be written as “aeuld” and correspond to the numbers "23853". The German special character “ß” must be replaced by “ss” (77).

This chapter shows the operation of the Control Mode in OpenScape Voice Portal via your telephone keypad in graphic overviews.

4.1 OpenScape Voice Portal Operating Modes

Operating modes for the OpenScape Voice Portal.

Each OpenScape UC Application user is assigned one of three messages/ OpenScape Voice Portal operating modes:

- OpenScape UC Application Voice Portal basic Unified Messaging
- Other Voicemail/Unified Messaging
- OpenScape Xpressions Unified Messaging (PhoneMail)

In these three operating modes different features are available.

The setup version of your system environment determines which of these operating modes are available. In case of doubt please contact your system administrator.

You will find an overview of these differences in the following table:

Function of the OpenScape Voice Portal	OpenScape UC Application Voice Portal basic Unified Messaging	Other Voicemail/ Unified Messaging	OpenScape Xpressions PhoneMail
Access number of the Control Mode (Direct Access)	OpenScape Voice Portal number for the Control Mode	OpenScape Voice Portal number for the Control Mode	OpenScape Xpressions PhoneMail number for the Control Mode
Login and main menu	Yes	Yes	AboutOpenScape Xpressions PhoneMail
Messages	Yes	Transfer to another UM/VM system	AboutOpenScape Xpressions PhoneMail
Calendar	Yes	Yes	Yes
Conferences	Yes	Yes	Yes
Settings	Yes	Yes	Yes
Calling subscribers	Yes	Yes	AboutOpenScape Xpressions PhoneMail
Access number for the Answering Machine Mode (Guest Access)	OpenScape Voice Portal number for the Answering Machine Mode	OpenScape Voice Portal number for the Answering Machine Mode	OpenScape Xpressions PhoneMail number for the Answering Machine Mode

NOTICE: A finer control of the feature access is possible via the OpenScape UC Application licence administration.

NOTICE: In mulitlingual environments several access codes can be provided for a certain usage mode.

NOTICE: Please ask your system administrator for information on your assigned user type and the access number to be used.

4.2 Access to the OpenScape Voice Portal

Logon options to the OpenScape Voice Portal Control Mode (Direct Access).

You can use the OpenScape Voice Portal functions via two types of access: The following access types to the Control Mode (Direct Access) are possible:

- A direct logon to the OpenScape Voice Portal.

- A logon to the OpenScape Xpressions PhoneMail. This means that the OpenScape Xpressions PhoneMail functions are extended by further OpenScape Voice Portal functions.

> ***NOTICE:*** The Answering Machine Mode is used in the OpenScape Voice Portal and the OpenScape Xpressions PhoneMail via a separate access number which does not require a logon to the system.

4.2.1 Access via direct Logon to the OpenScape Voice Portal

Direct logon to the OpenScape Voice Portal.

In case of use via direct logon to the OpenScape Voice Portal the following modes are possible:

- OpenScape UC Application Voice Portal basic Unified Messaging
- Other Voicemail/Unified Messaging

The OpenScape Voice Portal supports the following categories of features:

- Login. After you have logged in successfully, you have access to the main menu.
- Messages
- Calendar
- Conferences
- Settings
- Calling subscribers

4.2.2 OpenScape Voice Portal Access via OpenScape Xpressions PhoneMail

OpenScape Voice Portal Access via OpenScape Xpressions PhoneMail.

You can reach various OpenScape Voice Portal functions also via the OpenScape Xpressions PhoneMail telephone interface, if an OpenScape Xpressions server is integrated in the OpenScape UC Application environment.

The following OpenScape Voice Portalfeatures are then additionally available to OpenScape Xpressions PhoneMail users:

- Accessing the **Conferences menu** of OpenScape UC Application with the functions:
  - Joining a conference
  - Starting a conference
- Providing the OpenScape UC Application function **Unified Communications Options** with the features:

- Accessing the Calendar menu. The Calendar menu offers access to the calendar features of *Microsoft Outlook* and *Lotus Notes*.
- Accessing your presence status settings for changing your presence status.
- Accessing the settings of your preferred device
- Accessing the routing rules for activating one of the routing rules you have defined.

4.3 The OpenScape Voice Portal Features

OpenScape Voice Portal features.

The OpenScape Voice Portal supports the following categories of features:

In the Control Mode (Direct Access)

- Logging on to the system and accessing the main menu
- Via the **Mailbox menu**:
  - Sending voicemails
  - Playing messages
  - Selecting message types
  - Switching message directories
- Via the **Calendar menu**:
  - Accessing the *Microsoft Outlook* and *Lotus Notes* calendar feature
- Via the **Conferences menu**:
  - Joining a conference
  - Starting a conference
- Via the **Settings** menu:
  - Configure the reply options. These include recording welcome greetings and the individual name.
  - Setting voicemail options. Via this you can change your password and administrate your trusted numbers that enable simplified system access.
  - Setting the Unified Communications options. In this menu you can change your presence status, set your preferred device and select a routing rule for incoming calls.
  - Editing your contacts. Via this you can name dial a contact or retrieve the presence status of a selected contact.
- Via the **Call subscriber** Menu
  - Calling a subscriber directly (entering the phone number) or via name dialing (entering the contact name).
- Via the **Help** menu detailed help greetings for the main menu are played.

NOTICE: A help feature is available for all submenus via which you can play detailed help greetings to every menu you are currently in.

In the Answering Machine Mode (Guest Access)

- Configuring a personal answering machine by creating a call diversion to the Answering Machine Mode. Furthermore, you can call the Answering Machine Mode directly from any phone and record voicemails for the OpenScape subscribers and store the messages in their mailbox.

4.4 Logging on to the Main Menu

Logging on to the OpenScape Voice Portal and to the main menu.

If you wish to edit messages or your mailbox settings, you need to log on to the OpenScape Voice Portal Control Mode via telephone to reach the main menu. For this purpose you can use any telephone.

NOTICE: The system can be configured by the administrator so that you need to record your name first with the first logon to OpenScape Voice Portal. In this case, you cannot access the system without recording your name.

To log on to the system you need to pass through a default logon procedure.

The following diagram shows the steps necessary for gaining access to the OpenScape Voice Portal:

NOTICE: The system can be configured by the administrator so that after the logon procedure, you are offered the option to access directly the **Join conference** menu if at least one active conference exists for you, or to continue with the main menu.

4.4.1 How to Log on to the OpenScape Voice Portal

Logging on to the OpenScape Voice Portal follows a given procedure.

Prerequisites

- The OpenScape Voice Portal can exclusively be used at an installed OpenScape UC Application system.
- You have an account on the OpenScape UC Application system.
- You know the access number of the Control Mode (Direct Access). If you do not know your PIN, please ask your system administrator.
- You know your account number. If you do not know your PIN, please ask your system administrator.
- You know your password (PIN). If you do not know your PIN, please ask your system administrator.

> ***NOTICE:*** Your administrator will give you a password (PIN) for your first login that you can use for your first login at the system. The system can be configured so that you need to change your password (PIN) during this first login.

Step by Step

1. Enter the Control Mode access number via telephone.

   If you call from a corporate phone, this will in most cases be an extension. If you make an external call or use your cellphone, you need to enter the complete company number, followed by the Control Mode access number.

   The system then prompts you to enter your account number.

2. Enter the account number.

   The system then prompts you to enter your PIN.

3. Enter your PIN for authentication.

During or after dialing in, the following operating states may occur:

- After having entered your logon data correctly, you will be connected to the OpenScape Voice Portal Control Mode. Depending on the server configuration, you will be:
  - directly in the main menu to access the functions to edit your mailbox.
  - directly in the conference menu if at least one active conference exists for you. In this case, you will be offered first the active conferences to join them. Only if you refuse to do so, you will access the main menu.
- If you make a mistake while entering the data, the system prompts you to repeat your entries from step 2.
- If the number of your login attempts exceeds the pre-set number of attempts, the connection is closed. Then dial in again, starting with step 1.

4.5 The Mailbox Menu

Overview of the Mailbox menu functions.

You can use the OpenScape Voice Portal to access your mailbox by telephone keypad.

The **Mailbox menu** offers the following features:

- Sending messages (voicemails)
- Playing new Voicemails
- Selecting message types
- Switching message directories

4.5.1 Sending Messages

Overview diagram with the full functional range for sending messages.

The **Send message** menu lets you create and address new messages.

Creating and sending a message takes place according to the following pattern:

Invoke the **Send message** menu > Address the message > Record the message > Select the delivery option.

Please refer to the following figure for detailed operating options of the **Send message** menu:

4.5.1.1 How to Send Messages

Sending a message (voicemail).

Step by Step

1. Select the **Send message** menu.

   After you have selected this function the system prompts you to enter the recipient's address.

2. Address the voicemail.

   You can address the recipient of the voicemail either by entering the account number or via name dialing.

   After you have entered the recipient, the system prompts you to record the message.

3. Record the message.

   Follow the system prompts to record the message.

   After you have completed your recording, the system prompts you to select a delivery option.

4. Define the delivery option.

   After you have recorded the voicemail you can set one or several of the following delivery options:

   - Requesting a delivery report.
   - Sending the message as confidential.
   - Sending the message as urgent.
   - Selecting standard delivery (without one of the aforementioned options)

5. Send the message.

After you have finished setting the delivery options or selected the standard delivery, the voicemail is sent automatically.

4.5.2 Playing new Voicemails

Overview diagram with the full functional range for playing messages.

You can access newly received messages via the **Select new voicemail** menu.

Playing a new message takes place according to the following pattern:

Invoke the **Select new voicemail** menu > Play message > Select the Editing function.

Please refer to the following figure for detailed operating options of the **Play new voicemail** mailbox menu:

4.5.2.1 Playing new Voicemails

Playing a new voicemail message.

Step by Step **1.** Select the **New voicemail message** menu.

After you have selected this function, a system greeting informs you by default how many new unread voicemails are in your mailbox.

NOTICE: You can have the system play messages according to the message type you select.

---

2. Play message.

   The messages are then played in the order latest message first.

3. Select modification feature.

   After the playback or after you have cancelled the playback, the following modification options are - according to the message type - available for the latest played message:

   - Sending, to send a message from the Drafts directory.
   - Replying, with the options: Replying to sender or replying to all recipients of this message.
   - Accepting or declining if the message is an invitation to a meeting.
   - Going to the previous message.
   - Undoing the deletion (only for messages from the Deleted objects directory) or setting a message status from read to unread.
   - Going to the previous message.
   - Playing the message again with further options.
   - Deleting the message.
   - Calling the originator.

     NOTICE: Then you go to the device selection menu for this user.

   - Emptying the Deleted objects directory.
   - Forwarding the message with or without a comment.
   - Going to the next message.
   - Changing the output language for messages that are played by Text-to-speech (TTS).

     NOTICE: E-mails and appointment notifications are played. The system might inform you that the e-mail has an attachment. If the attachment is a text file, it is not played. Only WAV files are played automatically.

4.5.3 Selecting a Message Type

Overview diagram with the full functional range for selecting the message type.

Select this menu to define which type of messages you wish to listen to.

The selection takes place according to the following pattern:

Invoke the **Select message type** menu > Select the message type > Select the message options.

Please refer to the following figure for detailed operating options of the **Select message type** mailbox menu:

4.5.3.1 How to Select a Message Type

Selecting the message type.

Step by Step

1. Invoke the **Select message type** menu.

   The system announces the message types you can select.

2. Select the message type

   You can select the following message types:

   - Meetings or appointment invitations.
   - Voicemails.
   - E-mails.
   - Meetings.

- All messages.

NOTICE: You can select meetings after choosing the inbox directory. If you have selected another directory, the menu item Appointment notices is displayed in this menu instead of the menu item Meetings.

---

3. Select the message options.

For voicemails and e-mails, you can start the message playback for all messages or limit the playback to certain messages. To limit the message selection to certain messages, you can choose between the following criteria:

- Playback of new messages.
- Playback of read messages.
- Playback of messages marked as urgent.
- Playback of regular messages.
- Playback of new messages marked as urgent.
- Playback of read messages marked as urgent.
- Playback of new regular messages.
- Playback of read regular messages.

You have the following options for meeting requests:

- Selecting appointment invitations.
- Selecting meeting replies.
- Selecting all appointment invitations and meeting replies.

After you have selected the desired message option, the system starts to play the messages with the selected options from the set message directory.

4.5.4 Switching message directories

Overview diagram with the full functional range for selecting the message directory.

Select this menu to define from which directory the messages you wish to listen to shall originate.

The selection takes place according to the following pattern:

Invoke the **Change message directory** menu > Select the message directory.

Please refer to the following figure for detailed operating options of the **Change message directory** mailbox menu:

4.5.4.1 How to Switch the Message Directory

Switching to another message directory for message playback.

Step by Step

1. Invoke the **Change message directory** menu.

   The system announces the message directories you can select.

2. Select the message directory.

   You can select the following message directories:

   - The inbox directory for received messages.
   - The deleted-objects directory.
   - The drafts directory.

   After having selected the desired message directory, you will be offered by the system the selection of the desired message type. After this, the messages of the selected message type in this directory will be played.

4.6 The Calendar Menu

Overview of the Calendar menu functions.

You can use the OpenScape Voice Portal to access your *Microsoft Outlook* or *Lotus Notes* calendar via telephone keypad.

The Mailbox menu provides the following features:

- Retrieving the next upcoming appointment. The next appointment from the current time on within the next seven days is played.

- Playing all appointments of a specific date range

4.6.1 Playing and Editing Appointments

Overview diagram with the full functional range for retrieving upcoming appointments.

This menu lets you play and edit the next appointment within the next seven days as well as look for appointments due on specific days.

The feature selection takes place according to the following pattern:

Select the **Calendar menu** function > have the next appointment played or look for an appointment > edit an appointment.

Please refer to the following illustration for detailed operating options of the **Calendar menu**:

4.6.1.1 How to Retrieve the Next Upcoming Appointment

Playing the next upcoming appointment.

Step by Step

1. Select **Calendar menu**

   The next appointment from the current time on within the next seven days is played.

2. Select the **Play next appointment** function.

   Select this menu to play the next appointment.

3. Edit appointment.

   After the appointment playback the following editing options are available:

   - Recording a reply
   - Playing a message
   - Accepting/declining the appointment, with message recording
   - Listing meeting participants
   - Deleting/canceling the appointment
   - Calling the meeting organizer

4.6.1.2 How to Play Appointments from a specific Date Range

Looking for appointments within a specific date range.

Step by Step

1. Select **Calendar menu**

   The next appointment from the current time on within the next seven days is played.

2. Select the **Look for appointments** function.

   The following options are available for this purpose:

   - Play today's appointments
   - Play tomorrow's appointments
   - Enter time range (year, month and day) for the appointment search

3. Edit appointment.

   After the appointment playback the following editing options are available:

   - Recording a reply
   - Playing the previous appointment
   - Playing a message
   - Accepting/declining the appointment, with message recording
   - Listing meeting participants

- Deleting/canceling the appointment
- Calling the meeting organizer
- Playing the next appointment
- Returning to the calendar menu

4.7 The Conferences Menu

Overview of the Conferences menu functions.

You can use the OpenScape Voice Portal to manage your conferences by keypad.

The **Conferences menu** provides the following features:

- Joining a conference
- Starting a conference

4.7.1 Starting or Joining Conferences

Overview diagram with full functional range for starting or joining conferences.

This menu lets you first play your upcoming conferences and, after you have selected a conference, you are automatically connected to this conference or can start it.

NOTICE: Scheduled conferences, thus conferences with a defined start time configured via the OpenScape Desktop Client Enterprise Web Embedded Edition or the OpenScape Web Client, are not announced by the system.

The following conferences are announced by the system:

- Conferences that are in the lead time prior to the actual start or that have already been started so that you can join in.
- Conferences configured without a start time so that you can start or join them.
- Conferences created via OpenScape Extensions for Microsoft Outlook or OpenScape Extensions for Lotus Notes.

The feature selection takes place according to the following pattern:

Select the **Conferences menu** function > Join or start a conference.

Please refer to the following figure for detailed operating options of the **Conferences menu**:

4.7.1.1 How to Join a Conference

Joining a selected conference

Step by Step

1. Select the **Conferences menu**.
2. Select the **Join conference** function.

   Select this menu to join a conference you have been invited to.

   Via this feature the upcoming conferences are first played in groups of six.
3. Select conference.

   After you have selected the **Join conference** function, the following editing options are available:

   - Selecting a conference from the first group of six
   - Going to the previous group of six
   - Going to the next group of six

   After you have selected the desired conference you are automatically connected to this conference.

4.7.1.2 How to Start a Conference

Starting a (self-created) conference.

Step by Step

1. Select the **Conferences menu**.
2. Select the **Start conference** function.

   Select this menu for starting a conference you have configured yourself. Then you can start the conference either by selecting the conference type or by having listed all conference that can be started.

   The conferences you have configured yourself are played first.
3. **Select conference type**

   Select this function if you wish to start a self-created conference via the conference type. The following selection options are available:

   - Selecting the moderator conference that can be started if you have defined the conference so that only you as moderator are allowed to start the conference.
   - Selecting the recurrent conference that can be started if you have defined the conference so that it is a recurrent conference.
   - Selecting the one time conference that can be started if you have defined the conference so that it is a one time conference.

   After you have selected this function, the available conferences are offered in groups of six so that you can pick the desired one.
4. **Select all conferences that can be started**.

   Select this function if you wish to start one of your self-created conferences without considering the conference type.

   After you have selected this function, the available conferences are offered in groups of six so that you can pick the desired one.

4.8 The Settings Menu

Overview of the functions of the Settings menu.

You can use the OpenScape Voice Portal to change your system settings by keypad.

The **Settings** menu provides the following features:

- **Reply options**

- You can configure a special welcome greeting for each presence status (Available, In a meeting, Do not disturb, Be right back, Not available and Busy). The welcome greeting changes automatically when you change your status.

  NOTICE: The **Unified Communications options** menu lets you change your presence status also using the OpenScape Voice Portal.

- You can record your name. This name greeting is played e.g. if you send a voicemail to another OpenScape user.

  INFO: If you do not record a name, the name recording is generated and played via Text-to-Speech (TTS).

- **Voicemail options**
  - You can change your password (PIN).
  - You can administer your three trusted numbers

  NOTICE: Via the definition of trusted numbers a user can define the telephone extensions via which he/she can access his/her mailbox without identification, i.e. having to enter the account and PIN number. You can define a maximum of three devices as trustworthy. Please note that the device that is to be trustworthy allows to transmit the caller ID and that this feature is enabled. You should know that trusted numbers might become a security problem. Everyone who knows which telephone is trustworthy and has access to this device can have complete control over this foreign mailbox. You should never define the telephone at your work station as trustworthy, if other persons have access to your workstation.

- **Unified Communications options**
  - Change your presence status.
  - Set your preferred device.
  - Activate a routing rule you have defined for incoming calls.
- **Edit contact**
  - This menu lets you enter a contact's name by numerical keys to select him/her from your contact list for retrieving his/her presence status or calling him/her.

4.8.1 Reply Options

Overview diagram with the full functional range for setting your reply options.

Select this menu to perform the following actions:

- Recording greetings for each of your presence statuses.
- Recording your name.

The selection takes place according to the following pattern:

Invoke the **Settings** menu > select Reply options > record/delete/edit a greeting or name.

Please refer to the below figure for detailed operating options of the **Reply options** menu from the **Settings** menu:

4.8.1.1 How to Record a Welcome Greeting

Recording a welcome greeting.

Step by Step

1. Select the **Settings** menu.
2. Select the **Reply options** function.

   Select this menu to record your greetings.

3. Select the **Record greeting** function.

   Select this feature to record greetings for the presence statuses.

4. Assign greeting to a presence status or record alternate greeting.

   Select the presence status for which you would like to record the welcome greeting. The following presence statuses are available:

   - Available
   - In a meeting
   - Do not disturb
   - Be right back
   - Unavailable
   - Busy

   NOTICE: You can also record an alternate greeting that is played if the configured presence status has no greeting.

5. Record/delete greeting.

   Choose whether you would like to record a new greeting or delete an existing one.

   Record your greeting.

   NOTICE: After having deleted a greeting you will automatically go to the menu branch via which you can record a new greeting.

6. Edit greeting.

   After the recording you can continue editing the recording. The following editing options are available for the recording:

   - Discard greeting recording and rerecord.
   - Continue recording.
   - Play the recording (for checking purposes).
   - Finish recording.
   - Cancel recording and return to the menu branch Rerecord greeting.

4.8.1.2 How to Record your own Name

Recording your own name

Step by Step

1. Select the **Settings** menu.
2. Select the **Reply options** function.

   Select this menu to record your greetings.

3. Select the **Record name** function.

   Select this feature to record your name.

   If you have not recorded a name yet, you will automatically be asked to record your name.

   NOTICE: If you have already recorded your name you can use the editing functions to change the existing name recording.

4. Edit new name recording.

   After you have recorded your name you can edit this recording. For editing the name recording the following options are available:

   - Discard name recording and rerecord.
   - Continue stopped recording.
   - Play the recording (for checking purposes).
   - Finish the recording.
   - Cancel the recording and back to menu branch Rerecord name.

5. Change existing name recording.

   If you have recorded your name already you are automatically taken to the menu branch for editing your current name recording. For editing the name recording the following options are available:

   - Delete the existing name recording and rerecording the name
   - Play the current name recording (for control purposes).
   - Delete a name recording.

4.8.2 Voicemail Options

Overview diagram with the full functional range for setting your voicemail options.

Select this menu to perform the following actions:

- Changing your password (PIN)
- Managing your trusted numbers

NOTICE: Please note that your new password (PIN) must correspond to the guidelines for passwords (PINs) that are valid in your system.

The selection takes place according to the following pattern:

Invoke the **Settings** menu > Select Voicemail options > Select Change password or Manage trusted numbers.

Please refer to the below figure for detailed operating options of the **Voicemail options** menu from the **Settings** menu:

4.8.2.1 How to Change the Password (PIN)

Changing the password (PIN)

Step by Step

1. Select the **Settings** menu.
2. Select the **Voicemail options** function.

   Select this menu to edit your voicemail options.
3. Select the **Change password** function.

   Select this menu to change your password (PIN).

   You are prompted to enter a new password.

   NOTICE: Please note that your new password (PIN) must correspond to the guidelines for passwords (PINs) that are valid in your system.

4. Enter password (PIN).

   Enter your new password (PIN).

5. Confirm/discard password (PIN).

   After you have entered your new password (PIN) you have the following operating options:

   - Confirm new password (PIN).

     NOTICE: If you have entered a password that does not correspond to the system guidelines, you will go back to the menu branch to enter the password (PIN) to repeat entering the password.

   - Discard entered password (PIN).

     NOTICE: You will then come back to the menu branch to enter your password (PIN).

4.8.2.2 How to Manage Trusted Numbers

Managing trusted numbers.

Step by Step

1. Select the **Settings** menu.
2. Select the **Voicemail options** function.

   Select this menu to edit your voicemail options.
3. Select the **Manage trusted numbers** function.

   Select this menu to manage your trusted numbers. The following operating options are available:

   - Play current trusted numbers.
   - Add trusted number.

     NOTICE: Following this action you reach the menu branch where you can define a device as trustworthy.

   - Edit trusted number.

     NOTICE: Following this action you reach the menu branch where you can define another device as trustworthy.

   - Delete trusted number.

     NOTICE: After you have deleted a trusted number you reach the menu branch in which you can define another device as trustworthy.

4. Add trusted number.

Select this option to define another device as trustworthy. After you have invoked this function the following options are available:

- Select available device.

  NOTICE: Afterwards you arrive at the menu branch for selecting a device.

- Apply ANI.

  NOTICE: When you select this option, the phone number of the device called at the OpenScape Voice Portal is copied as trusted number.

- Copy dialable number.

  NOTICE: You will arrive at a menu branch where you can enter any phone number that will be defined as trustworthy.

5. Edit/delete trusted numbers

After you have selected the Edit/Delete trusted numbers feature the following options are available for selecting a new trustworthy device:

- Select the device you would like to edit/delete from the maximum of three existing trustworthy devices.

  NOTICE: After you have selected the device you reach the menu branch in which you can define another device as trustworthy.

4.8.3 Unified Communications Options

Overview diagram with the full functional range for setting your Unified Communications options.

Select this menu to perform the following actions:

- Changing your presence state

  NOTICE: This setting allows you to inform the other OpenScape UC Application users as to whether they can reach you.

- Setting your preferred device

  NOTICE: Via this feature you can select the device from your device list that is to accept your incoming calls.

- Activating one of the routing rules you have defined

  NOTICE: Via this feature you can enable one of the routing rules for incoming calls that you have predefined.

The selection takes place according to the following pattern:

Invoke the **Settings** menu > Select Unified Communications options > Select Change presence status, Set preferred device or Activate rule.

Please refer to the below figure for detailed operating options of the **Unified Communications options** menu from the **Settings** menu:

4.8.3.1 How to Set your Presence Status

Setting your own presence status.

Step by Step

1. Select the **Settings** menu.
2. Select the **Unified Communications options** function.

   Select this menu to change your Unified Communications options.
3. Select the **Change presence status** function.

   Select this menu to change your presence status.
   Your current presence status is played.
   In this menu branch the following operating options are available:
   - Change status
   - Keep current presence status.

   NOTICE: After you have selected this option you return to the Unified Communications options menu.
4. Enter presence status

   The following setting options are available for your presence status:
   - Available
   - In a meeting
   - Do not disturb
   - Be right back
   - Unavailable
   - Busy

4.8.3.2 How to Manage Preferred Devices

Setting the preferred device.

Step by Step

1. Select the **Settings** menu.
2. Select the **Unified Communications options** function.

   Select this menu to change your Unified Communications options.
3. Select the **Set preferred device** function.

   Select this feature to configure your preferred device. In this menu branch the following operating options are available:
   - Change preferred device.

- Keep currently preferred device.

  NOTICE: After you have selected this option you return to the Unified Communications options menu.

4. Select the preferred device.

If you have selected the option Change preferred device, the following setting options are available for your presence status:

- Select available device.

  NOTICE: Subsequently, you are taken back to the menu branch to select the preferred device.

- Apply ANI as preferred device.

  NOTICE: When you select this option, the phone number of the device called at the OpenScape Voice Portal is copied as preferred device.

- Copy dialable number.

  NOTICE: You will arrive at a menu branch where you can enter any phone number that will be defined as preferred device.

4.8.3.3 How to Activate a Routing Rule

Activating a routing rule.

Step by Step

1. Select the **Settings** menu.

2. Select the **Unified Communications options** function.

Select this menu to change your Unified Communications options.

3. Select the **Enable routing rule** function.

Select this function to activate one of your routing rules. In this menu branch the following operating options are available:

- Activate rule set.

  NOTICE: Your routing rules are combined to rule sets in groups of six.

- Deactivate rule set.

  NOTICE: After you have selected the **Deactivate rule set** option you are taken back to the menu branch where you can select another rule set or leave the **Enable routing rule** menu.

- Leave the **Enable routing rule** menu

  NOTICE: Leaving this menu and going back to the **Unified Communications options** menu..

4. Select routing rule

After you have activated a rule set, the following setting options are available for selecting the routing rule:

- Select rule.

  NOTICE: Select the rule you wish to use from a rule set of six rules. After you have selected the routing rule you return to the Settings menu.

- Go to the previous group of six

  NOTICE: This option lets you move to the previous rule set for selecting a rule.

- Go to the next group of six

  NOTICE: This option lets you move to the next rule set for selecting a rule.

4.8.4 Editing a Contact

Overview diagram with the full functional range for setting your Unified Communications options.

Select this menu to trigger the following functions:

- Playing back the presence status of a specific contact.
- Setting up a connection to this contact.

The selection takes place according to the following pattern:

Invoke the **Settings** menu > select **Unified Communications Options** > have presence status of a specific contact played back or have a connection set up to this contact.

Please refer to the below figure for detailed operating options of the **Edit contact** menu from the **Settings** menu:

4.8.4.1 How to Edit a Contact

Requesting the presence status of a contact and subsequently setting up a connection to him/her.

Step by Step

1. Select the **Settings** menu.
2. Select the **Edit contact** function.

   Select this feature to play back the presence status of the selected contact or to directly establish a connection to this contact.

3. Enter contact names for addressing.

   Enter the contact's name via telephone keypad. After having entered the contact name the system checks whether this name is valid.

   The contact has been found in the system:

   Your address entry is repeated by a system announcement. After you have confirmed the address announcement you will arrive at the menu branch where you can either play back the presence status of the contact or establish a connection to the contact.

   If the system announces a contact that you would not like to call, you can correct the addressing by entering another name.

   The contact has not been found in the system:

   If the system announces that a contact with that name does not exist, you can correct the addressing by entering another name.

   Alternatively, you can leave the Edit contact feature and return to the **Settings** menu.

   If the system has found the desired contact and you have confirmed the announcement of the contact, you will arrive at the menu to select the desired feature:

4. **Play presence status of selected contact**.

   The presence status of the selected contact is played back. Thereafter you automatically return to the menu branch for selecting functions **Play presence status of selected contact** or **Connect contact**.

5. **Connect with contact**.

   By calling this operating option you will arrive at the menu to select the device the call is addressed to. The following operating options are available:

   - Selecting a device.

     NOTICE: Select a device from the contact's device group as call target.

   - Going to the previous device group.

     NOTICE: Select a device from the contact's device group now offered as call target.

   - Going to the next device group.

     NOTICE: Select a device from the contact's device group now offered as call target.

   After you have selected the desired device the connection is immediately established.

4.9 The Call Subscriber Menu

Overview diagram with the full functional range for the OpenScape Voice Portal menu Call subscriber.

The Call subscriber menu lets you directly set up a telephone connection to any subscriber.

To address the desired conversational partner you can use name dialing or dial by entering the numbers.

> ***NOTICE:*** For name dialing the conversational partner must exist as entry in an address book or your contact list.

The selection takes place according to the following pattern:

Select the **Call subscriber** menu > Enter the phone number or contact name for addressing (if name dialing, select device).

Please refer to the following figure for detailed operating options of the **Call subscriber** menu:

4.9.1 How to Call a Subscriber via Digit Dialing

Calling a subscriber via digit dialing.

Step by Step

1. Select the **Call subscriber** menu.

   Select this function to directly set up a connection to a contact. The following dialing options are then available:

2. Enter a phone number

   After you have entered the phone number it is repeated by a system announcement. The following operating options are then available:

   - You can confirm the entry.
   - You can dismiss the entry. This takes you back to the menu branch for entering the phone number.

   After you have confirmed the phone number the connection is immediately set up.

4.9.2 How to Call a Subscriber via Name Dialing

Calling a subscriber via name dialing.

Step by Step

1. Select the **Call subscriber** menu.

   Select this function to directly set up a connection to a contact. The following dialing options are then available:

2. Invoke the **Name dialing** function.

   This action switches from digit to name dialing.

3. Enter contact names for addressing.

   Enter the contact's name via telephone keypad. After having entered the contact name the system checks whether this name is valid.

   The contact has been found in the system:

   Your address entry is repeated by a system announcement. By confirming the address announcement you will arrive at the menu to select the device the call is addressed to.

   If the system announces a contact that you would not like to call, you can correct the addressing by entering another name.

   The contact has not been found in the system:

   If the system announces that a contact with that name does not exist, you can correct the addressing by entering another name.

   Alternatively, you can leave the Edit contact feature and return to the **Settings** menu.

4. Select a device.

By confirming the address announcement you will arrive at the menu to select the device the call is addressed to. The following operating options are available:

- Selecting a device.

  NOTICE: Select a device from the contact's device group as call target.

- Going to the previous device group.

  NOTICE: Select a device from the contact's device group now offered as call target.

- Going to the next device group.

  NOTICE: Select a device from the contact's device group now offered as call target.

After you have selected the desired device the connection is immediately established.

4.10 The Help Menu

Notes for using the help functions.

You can call help in the main menu and in the sub menus by clicking on the phone key 0.

If help is called, detailed announcements are played concerning the operating options of the menu you are currently in.

After you have invoked the help function and click on the phone key 0 you are directly connected to the operator.

4.11 The OpenScape Voice Portal Answering Machine Mode (Guest Access)

General information about the OpenScape Voice Portal Answering Machine Mode.

The OpenScape Voice Portal Answering Machine Mode provides two useful functions to the OpenScape users:

- Every OpenScape user can configure his/her mailbox as an answering machine by redirecting his/her own extension to the Answering Machine Mode phone number.

- Every OpenScape user can leave a message for other OpenScape users by calling directly the Answering Machine Mode and entering the corresponding mailbox.

Both functions can be used independently. This means that, although you are using e. g. the Answering Machine Mode, other OpenScape users can still call your mailbox directly.

4.11.1 Using the Answering Machine Mode as Answering Machine

Using the Answering Machine Mode as answering machine.

Every OpenScape user can configure his/her mailbox as an answering machine by redirecting his/her own extension to the Answering Machine Mode phone number.

To this, just enter the phone number of the Answering Machine Mode as destination in the call diversion configuration in OpenScape Desktop Client Enterprise Web Embedded Edition or OpenScape Web Client.

The server detects automatically that you have redirected your telephone to the mailbox. All incoming calls are redirected to the recipient's mailbox.

The caller can leave a message for the callee on the mailbox as a voicemail.

The recipient of the message can listen to this message later via his/her mailbox access.

4.11.2 How to use the Answering Machine Mode to Send Voice Messages directly

Sending a voicemail via the Answering Machine Mode.

Prerequisites

- You need to know the access number to the Answering Machine Mode. In case of doubt please contact your system administrator.
- To address the voicemail, you need to know the account number or the name of the OpenScape user for whom you would like to leave a message.

Step by Step

1. Dial the access number to the Answering Machine Mode.

   If you call from a corporate phone, this will in most cases be an extension. If you make an external call or use your cellphone, you need to enter the complete company number, followed by the Control Mode access number.

   Your are prompted by an announcement to enter the account number of the OpenScape user for whom you would like to leave a message or to change to the name dialing mode by pushing the star key *.

2. Use the telephone keypad to enter the account number of the OpenScape user. If you have activated the name dialing, enter the name of the corresponding OpenScape user

You will be asked to record your message.

3. To finish the recording of your voicemail, push the pound key #. After this, you can choose one of the following commands for further actions:

a) Push 1 to discard the message recording and record a new message.

b) Push 2 to continue recording the message.

c) Push 3 to listen to the recorded message.

d) Push 6 to cancel the message recording and exit the Answering Machine Mode.

4. Send the recorded message by pushing again the pound key #.

The voicemail is sent to the recipient's mailbox.

5 OpenScape UC Speech Portal

General description of the OpenScape UC Speech Portals.

The OpenScape UC Speech Portal is the telephone user interface (TUI) for the OpenScape UC Application which is operated via voice commands. Thus, you can access the OpenScape UC Application features by spoken commands.

Your spoken commands are converted to control commands via a speech recognition software installed on the server.

NOTICE: The speech recognition software is currently only available for English and German.

The feature range is to a large extent identical to the OpenScape Voice Portal feature range. In addition to the features available in OpenScape Voice Portal, the following actions can also be performed:

- Creating calendar entries
- Performing ad-hoc conferences

You can use the following OpenScape UC Application features by spoken commands:

- **In the Control Mode** (Direct Access), you have the following options after having logged on to the system:
  - Editing your messages
  - Accessing your calendar and creating calendar entries
  - Joining a conference, starting a conference and performing an ad-hoc conference
  - Changing your system settings
  - Calling any subscriber
- **In the Answering Machine Mode** (Guest Access), you may:
  - Create you personal answering machine by configuring a call diversion to the Answering Machine Mode. Furthermore, you can call the Answering Machine Mode directly from any phone and record voicemails for the OpenScape subscribers and store the messages in their mailbox.

NOTICE: The Control Mode and the Answering Machine Mode can be reached by dialing different access numbers.

The OpenScape UC Speech Portal can be reached and used from any phone.

Your system administrator provides the code numbers for logging on to the OpenScape UC Speech Portal:

- Your access number for the OpenScape UC Speech Portal Control Mode.
- Your account number for the Control Mode.
- Your password (PIN) for the Control Mode.

- Your access number for the OpenScape UC Speech Portal Answering Machine Mode.

> ***NOTICE:*** If voice commands are not recognized by the system, it will allow you after a number of failed attempts to trigger selected actions by using the telephone keypad. The available options will be announced for the corresponding menu.

5.1 The OpenScape UC Speech Portal Features

OpenScape UC Speech Portal features.

The OpenScape UC Speech Portal supports the following categories of features:

In the Control Mode (Direct Access)

- Logging on to the system and accessing the main menu
- Via the **Mailbox menu**:
  - Sending voicemails
  - Playing messages
  - Selecting a Message Type
  - Switching message directories
- Via the **Calendar menu**:
  - Accessing the *Microsoft Outlook* and *Lotus Notes* calendar feature with the option of creating calendar entries.
- Via the **Conferences menu**:
  - Joining an active conference
  - Starting a conference
  - Performing an ad-hoc conference
- Via the **Settings** menu:
  - Configure the reply options.
    These include recording welcome greetings for different presence statuses and recording the individual name.
  - Setting voicemail options.
    Via this you can change your password and administrate your trusted numbers that enable simplified system access.
  - Setting the Unified Communications options.
    In this menu you can change your presence status, set your preferred device and select a routing rule for incoming calls.
  - Editing your contacts.
    This menu allows you to delete private contacts or to change the phone number of a private contact.
- Via the **Call subscriber** Menu
  - Calling a subscriber directly (entering the phone number) or via name dialing (entering the contact name).

- Via the **Help** menu detailed help greetings for the main menu are played.

> ***NOTICE:*** A help feature is available for all submenus via which you can play detailed help greetings to every menu you are currently in.

In the Answering Machine Mode (Guest Access)

- Configuring a personal answering machine by creating a call diversion to the Answering Machine Mode. Furthermore, you can call the Answering Machine Mode directly from any phone and record voicemails for the OpenScape subscribers and store the messages in their mailbox.

5.2 Operating the OpenScape UC Speech Portal

Instructions for operating the OpenScape UC Speech Portal.

The operation of OpenScape UC Speech Portal is accomplished by voice commands that you communicate to the system via your telephone.

The operation is intended to invoke by short commands quickly the desired function without passing from one voice command to another to reach the desired menu and finally the desired function.

> ***NOTICE:*** Additionally, you have the option to follow the menu structure. You may, for example, say "*Mailbox*" first to switch to the **Mailbox** menu and then "*Send a message*" to invoke the function **Send a new message** in this menu.

The principle of this system is to search the voice commands for certain keywords by using a speech recognition software. This means that there are no unique commands assigned to each of the functions which must mandatorily be spoken to trigger a determined function. The system is adapted to the natural use of language, so that it also accepts utterances as commands which express the command in a similar way.

The commands do not only allow you to change from one menu to another and to the submenus contained. You may also say directly the function you would like to access.

System prompts will support you by guiding you through the system. The announcements inform you about your position in the menu and which functions can be triggered there. This allows a completely intuitive operation: You can easily orientate yourself in the system and use your communication tool in as efficiently as possible.

> ***NOTICE:*** If voice commands are not recognized by the system, it will allow you after a number of failed attempts to trigger selected actions by using the telephone keypad. The available options will be announced for the corresponding menu.

Control Mode

After having dialed in to the Control Mode (Direct Access), the system will welcome you with the following announcement:

" *Looking in your mailbox and calendar and checking your status.*"

"*You have <xx> new messages, your current status is: <yy>*".

"*Main menu - what would you like to do?*"

After this announcement, just say the desired command. For example, "*Send a message*" to record, address and send a message.

Examples of voice commands

Sending a message in the **Mailbox** menu

You can use, for example, the following voice commands:

- "*I would like to record a message*"
- "*Record a message*"
- "*I want to record a message*"
- "*Send a message*"
- "*Send message*"
- "*I would like to send a message*"
- "*I want to send a message*"
- "*Send a message to <John Doe>*"

> ***NOTICE:*** You can only use the command "*Send a message to <John Doe>*" to address a message to a contact from your private contact list. If you would like to send a message to a global contact, use a voice command without the contact name.

Listening to a message in the **Mailbox** menu

You can use, for example, the following voice commands:

- "*Listen to all messages*"
- "*I would like to listen to all messages*"
- "*I would like to listen to all my messages*"
- "*I want to listen to all messages*"

- "*I want to listen to all my messages*"

Listening to voicemails in the **Mailbox** menu

You can use, for example, the following voice commands:

- "*Listen to voicemails*"
- "*I would like to listen to my voicemails*"

Listening to e-mails in the **Mailbox** menu

You can use, for example, the following voice commands:

- "*Listen to e-mails*"
- "*Listen to urgent e-mails*"
- "*Listen to all urgent e-mails*"
- "*I would like to listen to all urgent e-mails*"
- "*I would like to listen to all my urgent e-mails*"
- "*I want to listen to urgent e-mails*"

Listening to meeting requests in the **Mailbox** menu

You can use, for example, the following voice commands:

- "*Listen to meeting requests*"
- "*I would like to listen to my meeting requests*"

Listening to meeting responses in the **Mailbox** menu

You can use, for example, the following voice commands:

- "*Listen to meeting responses*"
- "*I would like to listen to my meeting responses*"

Listening to appointments in the **Calendar** menu

You can use, for example, the following voice commands:

- "*Listen to appointments*"
- "*I would like to listen to my appointments*"
- "*I want to listen to my appointments*"
- "*Listen to my next appointment*"
- "*I would like to listen to my next appointment*"
- "*I want to listen to my next appointment*"
- "*I would like to listen to my appointments between 1st January 2010 and 1st December 2011*"
- "*I want to listen to my appointments between 1st January 2010 and 1st December 2011*"

Creating an appointment in the **Calendar** menu

You can use, for example, the following voice commands:

- "*Create an appointment*"
- "*I would like to create an appointment*"
- "*I want to create an appointment*"
- "*I would like to create an appointment for tomorrow*"

- "*I would like to create an appointment for tomorrow at 10 o'clock*"

Starting a conference in the **Conference** menu

You can use, for example, the following voice commands:

- "*Start a conference*"
- "*I would like to start a conference*"
- "*I would like to start a conference with <xyz>*"
- "*I want to start a conference*"
- "*I want to start a conference with <xyz>*"

Recording a greeting in the **Settings menu** > **Answering options** > **Greetings**

You can use, for example, the following voice commands:

- "*Record a greeting*"
- "*I would like to record a greeting*"
- "*I want to record a greeting*"
- "*Record a greeting for status "Available'"*"
- "*I would like to record a greeting for status "Available'"*"
- "*Record a greeting for status "In meeting'"*"
- "*I would like to record a greeting for status "In meeting'"*"
- "*Record a greeting for status "No interruptions'"*"
- "*I want to record a greeting for status "No interruptions'"*"
- "*Record a greeting for status "Be right back'"*"
- "*I would like to record a greeting for status "Be right back'"*"
- "*Record a greeting for status "Unavailable'"*"
- "*I want to record a greeting for status "Unavailable'"*"
- "*Record a greeting for status "Busy'"*"
- "*I would like to record a greeting for status "Busy'"*"
- "*Record a default greeting*"
- "*I would like to record a default greeting*"

Recording a name in the **Settings menu** > **Answering options** > **Record a name**

You can use, for example, the following voice commands:

- "*Record a name*"
- "*I would like to record my name*"
- "*Delete a name*"
- "*I would like to delete my name*"

Changing the password in the **Settings menu** > **Voicemail options** > **Change password**

You can use, for example, the following voice commands:

- "*Change password*"
- "*I would like to change my password*"
- "*want to change my password*"

Changing the trusted number in the **Settings menu > Voicemail options > Change trusted number**

You can use, for example, the following voice commands:

- "*Change trusted number*"
- "*I would like to change my trusted number*"
- "*Add a trusted number*"
- "*I would like to add a trusted number*"

Changing the status in the **Settings menu > Unified Communications Options > Change Status**

You can use, for example, the following voice commands:

- "*Change status*"
- "*I would like to change my status*"
- "*I would like to change my status to "Available"*"
- "*I would like to change my status to "Busy"*"
- "*I would like to change my status to "No interruptions"*"
- "*I would like to change my status to "Be right back"*"
- "*I would like to change my status to "Busy"*"

Changing the preferred device in the **Settings menu > Unified Communications Options > Change preferred device**

You can use, for example, the following voice commands:

- "*Change preferred voice target*"
- "*I would like to change my preferred voice target*"
- "*Change preferred voice target to current number*"
- "*I would like to change my preferred voice target to the current number*"
- "*Change preferred voice target to predefined voice target*"
- "*I would like to change my preferred voice target to a predefined voice target*"

Activating a rule in the **Settings menu > Unified Communications Options > Activate rule**

You can use, for example, the following voice commands:

- "*Manage rules*"
- "*I would like to manage my rules*"
- "*I would like to activate my rules*"
- "*I would like to deactivate my rules*"

Managing contacts in the **Settings menu > Manage contacts**

You can use, for example, the following voice commands:

- "*Manage contacts*"
- "*I would like to manage my contacts*"
- "*I want to manage my contacts*"

Calling subscribers in the **Call subscribers** menu

You can use, for example, the following voice commands:

- "*Call <John Doe>*"
- "*I would like to call <John Doe>*"

These example commands allow you to access all available features of the OpenScape UC Speech Portal and to use them for your communication.

Using the Answering Machine Mode as Answering Machine

After having created a call diversion from your phone to the Answering Machine Mode phone number, all calls will be redirected automatically to your mailbox. The caller has the option to record a voice message and leave it as a voicemail in your mailbox.

Answering Machine Mode in Guest Access

After having dialed in to the Answering Machine Mode (Guest Access), the system will welcome you with the following announcement:

"*For whom would you like to leave a message?*"

After this announcement, just say the name of the desired subscriber. You can say the last name, the first name or both in any order. You can also enter the account number of the subscriber for whom you would like to leave a message via the telephone keypad. To check whether the system has identified the right subscriber, the name recognized or the name assigned to the account number is repeated. After this, you will be asked to record the message. After having finished the name recording, just end the connection. The message will be sent to the mailbox of the desired subscriber.

6 Conferences in the OpenScape UC Application

Overview of the conference types available via the OpenScape UC Application and the clients used for scheduling and controlling conferences.

The OpenScape UC Application conferencing features enable you to efficiently and reliably cooperate with your contacts and colleagues.

Depending on the installed and configured features you can use the following conferencing options in the OpenScape UC Application:

- **Merge Calls**
  You can initiate conferences via call control also. This lets you expand an active consultation call in normal telephone conversation to a conference. You use the **Merge Calls** feature for this purpose. A conference set up this way comprises all conference options.
- **MeetNow! Conferences**
  MeetNow! conferences are video or voice conferences that you can quickly configure via a special service access number with all privileged subscribers. The conference room is exclusively defined by entering an arbitrary PIN. That means, all conference participants who dial the service access number and enter the same PIN are in the same conference room and can directly talk to each other. A MeetNow! conference is always video-compatible. However, the video feature does not become active until the first conference participant dials into the conference with a video-compatible device.
- **Ad-hoc conferences**
  Ad-hoc conferences are initiated spontaneously, thus without any scheduling. You initiate such conferences via your client application by selecting conversation partners in your address list and calling them via the conference function.
  You can then extend Ad-hoc conferences to a video or web conference.
  - **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.
  - **Video conferences**
    You can expand every voice conference to a video conference under the appropriate conditions: server licenses, video-compatible devices respectively video-compatible clients. The video dialog opens automatically with starting the conference and the user only needs to release sending his/her own video image for starting the video streaming.
- **Meet Me conferences** (scheduled conferences)
  Meet-me conferences are all scheduled conferences. You can pre-configure them via the clients of the OpenScape UC Application (OpenScape Desktop Client Enterprise Web Embedded Edition or OpenScape Extensions for Microsoft Outlook).
  For Meet Me conferences you can configure:

- Whether they are to start at a scheduled time or, if this option is not used, are to be started manually by the moderator (moderated conference) or a conference participant (open conference).

  NOTICE: If participants need to dial into an open conference by themselves, it starts with the first participant dialing in.

- Who to invite for the conference.
- Which conference type to prepare in addition (web or video conference).
- Whether to create an open or moderated conference.
- Whether the conference participants are called to join the conference (dial-out) or need to dial in by themselves (dial-in).

  NOTICE: Scheduled conferences with video preparation are currently only possible via the OpenScape Extensions for Microsoft Outlook.

Meet Me conferences are first initiated as voice conferences, but can then be extended to a video or web conference.

- **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.
- **Video conferences**
  You can expand every voice conference to a video conference under the appropriate conditions: server licenses, video-compatible devices respectively video-compatible clients. The video dialog opens automatically with starting the conference and the user only needs to release sending his/her own video image for starting the video streaming.

The conference creator can set a start time for a meet-me conference. When this point in time is reached, the conference starts automatically.

If no start time is set, the following start-up procedures apply:

- In case of a moderated conference: The moderator must start the conference manually or dial into the conference.
- In case of an open conference: Any conference participant can start the conference or it starts when the first conference participant dials in.

You can use the following OpenScape clients for configuring and starting a conference:

- The **OpenScape Extensions for Microsoft Outlook**
  This extension provides Microsoft Outlook features for scheduling conferences via a meeting request in the Microsoft Outlook calendar. You can use the conference configuration options to create a voice conference that can be optionally extended to a video and/or web conference.

- The **OpenScape Web Client**
  This browser-based client of the OpenScape UC Application allows you to create ad-hoc as well as meet-me conferences.
  - You can create ad-hoc conferences via the **Call Control** or as extension of an active call. Another option is the **Contacts** function window, in which you select and call the desired conference participants.
  - You define meet-me conferences via the **Conferences** dialog.

  You find the detailed description of this client in the OpenScape UC Application OpenScape Web Client manual.
- The **OpenScape Desktop Client Enterprise Web Embedded Edition**
  This desktop client of the OpenScape UC Application allows you to create ad-hoc as well as meet-me conferences.
  - You can create ad-hoc conferences via the **Call Control** or as extension of an active call. Another option is the **Contacts** function window, in which you select and call the desired conference participants.
  - You define meet-me conferences via the **Conferences** dialog.

  You find the detailed description of this client in the OpenScape UC Application OpenScape Desktop Client Enterprise Web Embedded Edition manual.

6.1 Ad-hoc Conferences

Definition of ad-hoc conferences.

An ad-hoc conference is a dynamically and spontaneously configured and directly executed voice conference. If you wish to hold a meeting with several persons and you see in the contact list that all of them are available, you can select them and subsequently start a one-off voice conference in one step. You initiate ad-hoc conferences via the **Contacts (compact)** or **Contacts (extended)** window.

You can extend Ad-hoc conferences to video and/or web conferences.

6.2 Meet Me Conferences

The definition of meet-me conferences.

Meet Me conferences are voice conferences planned and configured in advance.

Meet-me conferences can be scheduled conferences that start automatically at a specific time. They can also be conferences started any time either manually by the moderator or automatically with the first participant who dials in.

A conference does not begin at the actual start time but somewhat earlier. This advance period is defaulted by a system configuration. It serves for balancing out minor differences between the system times of the conference participants, thus avoiding failed dial-ins.

If the defaulted conference duration was too short, it is automatically prolonged following the defaults in the system configuration. Such prolongations are defined in accordance with the overall duration of conferences configured in the system. The default-set value for a prolongation is 30 minutes.

In addition, a Meet Me conference can be designed as moderator-controlled or open conference. Several conference participants can be defined as moderators. This determines the conference proceedings.

The following actions end a Meet Me conference:

- The last moderator (moderated conference) leaves the conference by terminating the conference call. This triggers a grace period that allows other conference participants to end the conference also. When the grace period has expired, the conference ends.
- The last conference participant (open conference) logs out of the conference by terminating the conference call.

Scheduled conference

In case of a scheduled conference, the conference creator sets the start time and duration of the conference in accordance with the overall duration of conferences configured in the system.

Please note the following for a moderated and scheduled conference:

- If the moderator leaves the conference during the initially scheduled period, the conference persists until the initially scheduled end time. So, the other conference participants can resume the conference.
- If the moderator leaves the conference during a conference prolongation, the grace period starts when the moderator terminates the conference call. The grace period enables the other conference participants to end the conference also. When the grace period has expired, the conference ends.

Unscheduled conference

In case of an unscheduled conference you (as conference creator) need to start the conference manually. After the conference start the conference remains active within the scope of the overall duration of conferences configured in the system until the last conference participant has logged out by terminating the conference call.

Please note the following for a moderated and unscheduled conference:

- If the moderator leaves the conference during the initially scheduled period, the grace period starts when the moderator terminates the conference call. The grace period enables the other conference participants to end the conference also. When the grace period has expired, the conference ends.
- If the moderator leaves the conference during a conference prolongation, the grace period starts when the moderator terminates the conference call. The grace period enables the other conference participants to end the conference also. When the grace period has expired, the conference ends.

Open conference

An open conference is a meet-me conference in which all participants have equal control privileges. The conference starts automatically either at a scheduled time or with the first participant who dials in or manually with the first conference participant who dials in. The conference configuration allows two ways of joining in: Participants are either called automatically by the system after the conference start (dial-out) , or they need to dial in by themselves (dial-in) . You create an open conference by activating the **Open Conference** checkbox in the **Create conference** dialog.

Moderated conference

A moderated conference is a meet-me conference in which only the conference creator has the control privilege as moderator. The conference starts automatically at the scheduled time if such a point in time has been configured. If no start time has been defined, the moderator can start the conference manually or by dialing into the conference. Depending on the configuration, the conference participants can dial into the conference (dial-in) or are called by the system (dial-out) . When the moderator leaves the conference, it comes automatically to an end for the other participants, too. A moderated conference is created by the conference creator deactivating the **Open Conference** check box in the **Add Conference** dialog.

6.2.1 How to Configure a Meet Me Conference via the Conferences Dialog

Configuring a Meet Me Conference via the **Conferences** dialog.

How to configure a new Meet Me conference via the **Conferences** dialog:

Step by Step

1. Open the **Conferences** function window via **menu** > **Conference**.

   The settings dialog **Create conference** for configuring a new conference opens.
2. Enter under **Start time** the time for the automatic conference start.
3. If desired, add further participants via the or icon.
4. Perform the desired conference settings.
5. 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.

6. Click on **OK** to save modifications.

The settings dialog closes. Every participant can see the new conference as item of the conference list in the **Conferences** window. The conference starts automatically at the scheduled time.

> ***NOTICE:*** You find further conference setting details in the manuals OpenScape Desktop Client Enterprise Web Embedded Edition and/or OpenScape Web Client.

6.2.2 How to Configure a Meet Me Conference via the Contacts Dialog

Configuring a Meet Me Conference via the **Contacts** dialog.

How to configure a new Meet Me conference via the **Contacts** dialog:

Step by Step

1. Open the **Contacts** function window.
2. Select the conference participants from your contact list. You can select several contacts at a time by clicking on the desired contact list entries with the **[Ctrl]** key kept pressed.
3. Then click on .

   The settings dialog **Create conferences** in which you can configure the new conference with the selected participants opens.
4. Enter under **Start time** the time for the automatic conference start.
5. If desired, add further participants via the or icon.
6. Perform the desired conference settings.
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.

The settings dialog closes. Every participant can see the new conference as item of the conference list in the **Conferences** window. The conference starts automatically at the scheduled time.

> ***NOTICE:*** You find further conference setting details in the manuals OpenScape Desktop Client Enterprise Web Embedded Edition and/or OpenScape Web Client.

6.2.3 Joining an Active Meet-me Conference

Joining an active meet-me conference.

The way conference participants join a conference, thus, whether they are called by the system at the conference start or need to dial in by themselves, is first determined by the conference creator when configuring a conference. The invited conference participants, however, can change this setting using the clients OpenScape Desktop Client Enterprise Web Embedded Edition or OpenScape Web Client via the conference entry in the **Conferences** window.

> ***NOTICE:*** You must be a conference participant before you can join a conference already in progress.

The conference creator can choose the following options:

- Dial-In : The conference participants need to dial in by themselves. They can do this from any phone, from an OpenScape client or via voice portal.
- Dial-Out : The system calls the conference participants on their preferred device or under the phone number specified during the conference configuration.

These defaults require different steps for joining a conference.

6.2.3.1 Options for joining a Meet Me Conference

Joining a conference by dialing in or system call.

You can join a conference in two ways:

- The conference participants need to dial into the conference by themselves.
- The conference participants are automatically called by the system when the conference starts.

Dial-in:

> ***NOTICE:*** The dial-in option is possible for scheduled as well as unscheduled conferences.

If the configuration of your taking part in a conference wants you to dial in by yourself, the join-in procedure depends on the defaulted start-up behavior of the conference:

- In case of a scheduled conference the conference starts automatically when the defined start time is reached. You can then dial into the conference any time.
- In case of an unscheduled conference, the dial-in time depends on the configuration setting "open conference/moderated conference":

- In case of an open conference (conference configuration default) you can dial into the conference at will. The conference starts when a conference participant has started the conference manually or the first participant dials into the conference..
- In case of a moderated conference (resetting the **open conference** option), the moderator starts the conference manually or by dialing in. The other conference participants can dial in beforehand but are informed via announcement that the conference has not started yet.

NOTICE: In case of an unscheduled conference, the conference participant who started the conference need not log on to the conference by pushing the 1 key.

There are the following options for dialing in:

- You can directly dial into the conference from any phone using the dial-in data (bridge number and PIN) given in the dialog for this conference.
- You can dial in via the conference dialog in the OpenScape Web Client or in the OpenScape Desktop Client Enterprise Web Embedded Edition. In doing so, use the icon available for this conference. Enable the **Join conference** function from the context menu to dial into the conference.
- You can join the conference via the OpenScape Voice Portal. Select the **Conferences** menu in there and then the **Join conference** function.

Call-out:

NOTICE: The "call-out " setting is possible for scheduled as well as unscheduled conferences.

If the configuration of your taking part in a conference determines that the system calls you when the conference starts, the join-in procedure depends on the defaulted start-up behavior of the conference:

- In case of a scheduled conference the conference starts automatically when the defined start time is reached. Simultaneously with the conference start, the system calls all conference participants for whom the system call has been configured.
- In case of an unscheduled conference, the system call depends on the configuration setting "open conference/moderated conference":
  - In case of an open conference (conference configuration default) the system calls the conference participants for whom the system call has been configured when a conference participant has started the conference manually or the first conference participant dials into the conference.
  - In case of a moderated conference (resetting the **open conference** option) the system calls the conference participants for whom the system call has been configured after the moderator has started the conference manually.

6.2.3.2 How to Dial into a Conference by yourself via Telephone

Joining an active meet-me conference by dialing in yourself via telephone.

The conference participation requires you to dial in by yourself.

How to join the conference via any phone:

> ***NOTICE:*** The conference must have been started either by the system at the scheduled time or by the moderator (in case of a moderated conference) for you to dial in. The conference icon next to the relevant conference in the **Conferences** window switches from to . If the conference is an open one, it starts when the first participant dials in.

Step by Step

1. Dial the bridge number. You find this phone number in the conference dialog of the conference you wish to join.

   An announcement informs you that you are in the conference bridge. Subsequently, you are prompted to enter the conference PIN.

2. Enter the conference PIN via the telephone keypad.
3. Confirm the PIN entry with # .

   Now you hear an announcement that explains how to use the phone keypad for controlling the conference.

4. You are prompted to push 1 for joining the conference or abc 2 for rejecting to take part in the conference.

   After you have pushed 1 for joining the conference you hear an announcement that explains how to use the telephone keypad for controlling the conference.

A signal tone indicates that you are connected to the conference.

6.2.3.3 How to Dial into a Conference by yourself via the "Conferences" Dialog

Joining an active meet-me conference by dialing in by yourself via the OpenScape Web Client or the OpenScape Desktop Client Enterprise Web Embedded Edition.

The conference participation requires you to dial in by yourself. How to join the conference via the **Conferences** dialog:

> ***NOTICE:*** The conference must have been started either by the system at the scheduled time or by the moderator (in case of a moderated conference) for you to dial in. The conference icon

next to the relevant conference in the **Conferences** window switches from to . If the conference is an open one, it starts when the first participant dials in.

Step by Step

1. Start the OpenScape Web Client or the OpenScape Desktop Client Enterprise Web Embedded Edition.
2. Open the **Conferences** dialog.
3. In the **Conferences** window click on to the left of the name of the active conference you wish to join.

   A selection list appears.
4. Select the **Join Conference** option in the open selection list.

   A call is made to your preferred device.
5. After you have accepted the call, you are prompted to push 1 for joining the conference or 2 for rejecting to take part in the conference.

   After you have pushed 1 for joining the conference you hear an announcement that explains how to use the telephone keypad for controlling the conference.

A signal tone then indicates that you are connected to the conference.

6.2.3.4 How to Participate in a Moderated Conference by the System Calling you

Taking part in a moderated conference by the system calling you.

If the configuration of your joining the conference requires the system to call your preferred device, proceed as follows to join a moderated conference:

Step by Step

1. As moderator:

   a) In case of a scheduled conference, the moderator (and the other conference participants) is automatically called by the system when the conference start time is reached. He/she opens the conference by accepting the system call. If other conference participants have already accepted the conference call, they are in a waiting room and hear music-on-hold until the moderator joins the conference.

   b) In case of an unscheduled conference the moderator needs to start the conference manually. Subsequently, he/she (and the other conference participants) is called by the system. He/she opens the conference by accepting the system call. If other conference participants have already accepted the conference call, they are in a waiting room and hear music-on-hold until the moderator joins the conference.

   Note: Another way for the moderator to start a conference is to dial in directly.

2. For the other conference participants:

   a) In case of a scheduled conference the other conference participants are also called by the system when the conference start time is reached. After they have accepted the conference call they remain in the waiting room until the moderator joins the conference to start it. Only then the voice connection is set up. For the other conference participants called by the system applies: After they have accepted the call, they are prompted to push 1 for joining the conference or 2 for rejecting to take part in the conference.

   After you have pushed 1 for joining the conference you hear an announcement that explains how to use the telephone keypad for controlling the conference.

   A signal tone then indicates that you are connected to the conference.

   b) In case of an unscheduled conference, the system calls the other conference participants after the moderator has started the conference manually. If other conference participants have already accepted the conference call, they are in a waiting room and hear music-on-hold until the moderator joins the conference. For the other conference participants called by the system applies: After they have accepted the call, they are prompted to push 1 for joining the conference or 2 for rejecting to take part in the conference.

   After you have pushed 1 for joining the conference you hear an announcement that explains how to use the telephone keypad for controlling the conference.

   A signal tone then indicates that you are connected to the conference.

6.2.3.5 How to Participate in an Open Conference by the System Calling you

Taking part in an open conference by the system calling you.

If the configuration of your joining the conference requires the system to call your preferred device, proceed as follows to join an open conference:

Step by Step

1. For a scheduled conference:

   a) When the conference start time is reached, the system calls all conference participants.

   b) After you have accepted the call, you are prompted to push 1 for joining the conference or 2 for rejecting to take part in the conference.

   c) When you push 1 to accept joining the conference you hear an announcement that explains how to invoke the telephone control menu for the conference.

   A signal tone then indicates that you are connected to the conference.

2. For an unscheduled conference:
   a) After any conference participant has started the conference manually, the system calls this participant first and then all the others.
   b) After you have accepted the call, you are prompted to push 1 for joining the conference or abc 2 for rejecting to take part in the conference.
   c) When you push 1 to accept joining the conference you hear an announcement that explains how to invoke the telephone control menu for the conference.

      A signal tone then indicates that you are connected to the conference.

6.3 Web Conferences

Definition of 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 system you can integrate different web conferencing providers.

The web conferencing application OpenScape Web Collaboration Embedded is shipped with OpenScape UC Application by default. A moderator decides which participant may present his/her screen and who is in control of the presented screen. Likewise, the moderator can present his/her own screen and have it controlled.

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

Other web conferencing providers can be configured for use in a project-specific installation.

Check the combo box for selecting the web conferencing provider to see which web conferencing providers are available to you.

> ***NOTICE:*** Please obtain the operating instructions for the single web conferencing applications from the manuals of the respective web conferencing provider.
>
> If you can choose from several web conferencing providers, it is useful to deploy one specific web conferencing provider only. Since the features of all web conferencing providers vary only slightly, you need to familiarize yourself with only one web conferencing application.

> ***NOTICE:*** You find a guide to using and operating the OpenScape Web Collaboration web conferencing application as well as feature descriptions in the *OpenScape Web Collaboration V1* user manual.

Clients you can use for Web Conference

You can use the web conferencing feature on Windows-based systems only.

> ***NOTICE:*** You find information about Windows operating systems that can be used for staging web conferences in the *OpenScape UC Application V6 Planning Guide* manual.

You can stage a web conference alternatively via the following clients:

- A separate stand-alone client, which is downloaded and started for a web conferencing session.
- A web-based client that can be reached via a specific URL.

What is a Web Conferencing Application?

In OpenScape UC Application you can realize the web conferencing feature by different web conferencing applications. 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.

All in all the web conferencing function is similar to the one of a video/audio conference with the difference that the desktop of a user is transmitted instead of a video stream. This transmission can be controlled by the moderator or a participant if he/she has been granted the corresponding privilege.

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 member to remotely control the mouse and keyboard of the computer the desktop of which is currently displayed. He/she can thus operate the computer.

Further features of a web conferencing application are:

- Application selection
  You use this feature to specify the applications and screen elements to be visible to the session partners.
- Monitor control
  Via this feature you control how the web conferencing provider, e.g. FastViewer represents your screen to the session partners.
- Uploading, downloading and deleting files.
- Using a whiteboard feature in screenshot or live mode
  This enables the session participants to insert drawings and markings in the transmitted screen, which all other participants can see then. In case of the screenshot mode the displayed screen freezes to a fixed-image; in live mode the transmission continues without restriction.
- Using a chat feature
  The chat feature enables the transmission of text messages either to single participants or to all of them during the session.

With the conference configuration, all required conference data (participants, dial-in data, link for the web conferencing client and conference time) is sent by e-mail to the conference participants. In addition, the conference is entered for OpenScape UC Application participants in the conference list of the **Conferences** function window and, in case of Microsoft Outlook and Lotus Notes, automatically entered in the calendar.

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 only if their e-mail address is available in the system. If the external conference participants do not have an e-mail address, they must be informed separately, e.g. via an external e-mail address or by telephone.

6.3.1 How to Start an Ad-hoc Web Conference

Starting 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 you wish to talk to in a conference 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 participants 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 to each other after they have picked up the receiver. The spontaneously started voice 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 the successful download a security prompt is displayed.
7. Confirm this security prompt with a click on the **Apply** button.

The connection to the web conference server is set up.

6.3.2 How to Start a Meet-me Web Conference

Starting 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 the successful download a security prompt is displayed.

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

The connection to the web conference server is set up.

6.4 Configuring Conferences

Configuring conferences in the OpenScape UC Application.

The following functions are available in the toolbar of the windows for scheduling and controlling conferences:

6.4.1 Controls in the "Conferences" Dialog

Controls in the "Conferences" dialog

Controls in the toolbar

The following features are available in the toolbar of 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.
- **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 control elements of the conference in the **Call Control** window during the conference.
- **Active conference**
  Click on and select **View Conference** to display the connection data and control elements of an active conference in the **Call Control** window.

6.4.1.1 Controlling a Conference via the Call Control

Controlling a conference via the "Call Control" function dialog.

The following features are available in the **Call Control** function window for controlling an active conference:

In the header

- **Lock conference**
  This feature is only available for participants with moderator or creator privileges. This option blocks the conference for other subscribers who want to join in. After you have clicked on the icon it changes to .
- **Unlock conference**
  Releases the conference locking. After you have clicked on the icon it changes to .
- **Mute conference**
  This feature is only available for participants with moderator or creator privileges. It interrupts the sound transmission to all conference participants. After you have clicked on the icon it changes to .
- **Unmute conference**
  This feature is only available for participants with moderator or creator privileges. It cancels the conference muting.
- **End conference**
  This feature is only available for participants with moderator or creator privileges. It ends the conference by closing down the connections to the other conference participants.

- **Start 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.

During the connection representation of the conference participants

> ***NOTICE:*** The connection representation shows all participants who are currently in the conference. In a moderated conference, the moderator is indicated by a dot that precedes his/her name entry. The name of the conference participant who is currently active (thus talking) is highlighted in boldface.

- **Handover and continue active connection**
  This feature allows every conference participant to hand his/her conference connection over to another device and continue taking part in the conference from there.
- **Mute participant**
  It interrupts the sound transmission for a conference participant. After you have clicked on the icon it changes to .
- **Unmute 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 conference
    Enables every participant to leave the active conference. As soon as every participant has left the ad-hoc conference, the conference ends.

> ***NOTICE:*** After 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.

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.

6.4.1.2 Controlling a Conference via Telephone

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. The default setting for having the menu functions put out by announcement is * *. In case of doubt please contact your administrator.

Activating the Control Menu

You control a conference by entering two key commands on the keypad of your phone. This prevents conference disruptions by a telephone key being pushed inadvertently.

NOTICE: The administrator can change the telephone key/ command assignment. The following description refers to the system default setting.

Control Commands

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

- * * **Play menu**
  The available menu options are announced to you.
- * 2 **Lock/unlock conference.**
  This feature is only available for participants with moderator or creator privileges. Once the conference has been locked, no further participants may dial in. Pushing this key once more undoes the restriction.
- * 3 **Activate/lift muting.**
  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 **Activate/lift conference muting.**
  This feature is only available for participants with moderator or creator privileges. 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 # pound key. For further proceedings, please follow the voice prompts.

- * 9 **Turn off 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.

6.5 MeetNow! Conferences

General information about MeetNow! conferences.

MeetNow! conferences are video or voice conferences that you can quickly configure via a special service access number with all privileged subscribers. The conference room is exclusively defined by entering an arbitrary PIN. That means, all conference participants who dial the service access number and enter the same PIN are in the same conference room and can directly talk to each other. A MeetNow! conference is always video-compatible. However, the video feature does not become active until the first conference participant dials into the conference with a video-compatible device.

This conference type with its simple concept, however, makes it easy for unwanted conference participants to dial in. If, for example, conference participants agree upon a too simple PIN like *123*, unauthorized persons may find themselves in the conference inadvertently. To avoid this, use a more complex digit string as PIN. Such a PIN could be e. g. a participant's extension.

When a video conference is staged, the participants who dial in are merely expected to have video-compatible devices. Even if the MeetNow! conference is started via a pure audio device, video-compatible participants can directly switch to the video mode, thus stage a video conference by activating the video function.

To use this feature you need to be recognized as system user and have a special user profile (Professional or Team). In other words, when calling the service number for the MeetNow! conference a check is performed to find out whether you are entitled to create a MeetNow! conference. In addition, when an external call is made to the service number it is checked as to whether it comes from a device assigned to a user in the system and whether this device is exclusively assigned to this user. If one of the two criteria is not met, no MeetNow! conference can be created via this device.

6.5.1 How to Perform MeetNow! Conferences

Staging a MeetNow! conference.

How to perform a MeetNow! conference:

Step by Step

1. Inform the desired conference participants about the conference start time, your intended conference PIN, and, if required, the service access number. You can do this by phone or e-mail.
2. When the conference start time is reached, dial in with the service access number.

   NOTICE: If at least two participants with video-compatible devices have dialed into the conference, they can stage a video conference by activating the video function.

3. Enter the conference PIN.
4. Complete the entry with the pound key # .

   You are now in the conference room that was created by your defaulting a PIN.

5. Wait until the other conference participants have dialed in.

   The other conference participants need to dial in as described from step 2.

7 OpenScape Extensions for Microsoft Outlook

General Description of the OpenScape Extensions for Microsoft Outlook

After you have installed the OpenScape Extensions for Microsoft Outlook, *Microsoft Outlook* provides features for scheduling conferences via a meeting request in the Microsoft Outlook calendar. Among server-based conferences you find:

- Audio conferences
- Web conferences
- Video conferences

When the conference extensions are installed, the button

Add OpenScape conference

is displayed in the toolbar of the dialog for scheduling an appointment.

The conference is performed via the OpenScape UC Application server.

NOTICE: The default system configuration plays a short signal tone audible to all conference participants when a conference participant joins or leaves the conference. In case of a larger number of conference participants joining or leaving this signal tone may become annoying to the others. It is therefore not played anymore when the number of conference participants exceeds 15.

7.1 Requirements for Use

Requirements for using the OpenScape Extensions for Microsoft Outlook.

The OpenScape Extensions for Microsoft Outlook has been released only for specific Windows operating systems and Office versions.

You find current and detailed information about the supported operating systems and versions of the usable Outlook clients in the *OpenScape UC Application Planning Guide* manual.

7.2 Meet Me Conferences

The definition of meet-me conferences.

Meet Me conferences are voice conferences planned and configured in advance.

Meet-me conferences can be scheduled conferences that start automatically at a specific time. They can also be conferences started any time either manually by the moderator or automatically with the first participant who dials in.

A conference does not begin at the actual start time but somewhat earlier. This advance period is defaulted by a system configuration. It serves for balancing out minor differences between the system times of the conference participants, thus avoiding failed dial-ins.

If the defaulted conference duration was too short, it is automatically prolonged following the defaults in the system configuration. Such prolongations are defined in accordance with the overall duration of conferences configured in the system. The default-set value for a prolongation is 30 minutes.

In addition, a Meet Me conference can be designed as moderator-controlled or open conference. Several conference participants can be defined as moderators. This determines the conference proceedings.

The following actions end a Meet Me conference:

- The last moderator (moderated conference) leaves the conference by terminating the conference call. This triggers a grace period that allows other conference participants to end the conference also. When the grace period has expired, the conference ends.
- The last conference participant (open conference) logs out of the conference by terminating the conference call.

Scheduled conference

In case of a scheduled conference, the conference creator sets the start time and duration of the conference in accordance with the overall duration of conferences configured in the system.

Please note the following for a moderated and scheduled conference:

- If the moderator leaves the conference during the initially scheduled period, the conference persists until the initially scheduled end time. So, the other conference participants can resume the conference.
- If the moderator leaves the conference during a conference prolongation, the grace period starts when the moderator terminates the conference call. The grace period enables the other conference participants to end the conference also. When the grace period has expired, the conference ends.

Unscheduled conference

In case of an unscheduled conference you (as conference creator) need to start the conference manually. After the conference start the conference remains active within the scope of the overall duration of conferences configured in the system until the last conference participant has logged out by terminating the conference call.

Please note the following for a moderated and unscheduled conference:

- If the moderator leaves the conference during the initially scheduled period, the grace period starts when the moderator terminates the conference call. The grace period enables the other conference participants to end the conference also. When the grace period has expired, the conference ends.
- If the moderator leaves the conference during a conference prolongation, the grace period starts when the moderator terminates the conference call. The grace period enables the other conference participants to end the conference also. When the grace period has expired, the conference ends.

Open conference

An open conference is a meet-me conference in which all participants have equal control privileges. The conference starts automatically either at a scheduled time or with the first participant who dials in or manually with the first conference participant who dials in. The conference configuration allows two ways of joining in: Participants are either called automatically by the system after the conference start (dial-out) , or they need to dial in by themselves (dial-in) . You create an open conference by activating the **Open Conference** checkbox in the **Create conference** dialog.

Moderated conference

A moderated conference is a meet-me conference in which only the conference creator has the control privilege as moderator. The conference starts automatically at the scheduled time if such a point in time has been configured. If no start time has been defined, the moderator can start the conference manually or by dialing into the conference. Depending on the configuration, the conference participants can dial into the conference (dial-in) or are called by the system (dial-out) . When the moderator leaves the conference, it comes automatically to an end for the other participants, too. A moderated conference is created by the conference creator deactivating the **Open Conference** check box in the **Add Conference** dialog.

7.3 Web Conferences

Definition of 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 system you can integrate different web conferencing providers.

The web conferencing application OpenScape Web Collaboration Embedded is shipped with OpenScape UC Application by default. A moderator decides which participant may present his/her screen and who is in control of the presented screen. Likewise, the moderator can present his/her own screen and have it controlled.

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

Other web conferencing providers can be configured for use in a project-specific installation.

Check the combo box for selecting the web conferencing provider to see which web conferencing providers are available to you.

> ***NOTICE:*** Please obtain the operating instructions for the single web conferencing applications from the manuals of the respective web conferencing provider.
>
> If you can choose from several web conferencing providers, it is useful to deploy one specific web conferencing provider only. Since the features of all web conferencing providers vary only slightly, you need to familiarize yourself with only one web conferencing application.

> ***NOTICE:*** You find a guide to using and operating the OpenScape Web Collaboration web conferencing application as well as feature descriptions in the *OpenScape Web Collaboration V1* user manual.

Clients you can use for Web Conference

You can use the web conferencing feature on Windows-based systems only.

> ***NOTICE:*** You find information about Windows operating systems that can be used for staging web conferences in the *OpenScape UC Application V6 Planning Guide* manual.

You can stage a web conference alternatively via the following clients:

- A separate stand-alone client, which is downloaded and started for a web conferencing session.
- A web-based client that can be reached via a specific URL.

What is a Web Conferencing Application?

In OpenScape UC Application you can realize the web conferencing feature by different web conferencing applications. 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.

All in all the web conferencing function is similar to the one of a video/audio conference with the difference that the desktop of a user is transmitted instead of a video stream. This transmission can be controlled by the moderator or a participant if he/she has been granted the corresponding privilege.

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 member to remotely control the mouse and keyboard of the computer the desktop of which is currently displayed. He/she can thus operate the computer.

Further features of a web conferencing application are:

- Application selection
  You use this feature to specify the applications and screen elements to be visible to the session partners.
- Monitor control
  Via this feature you control how the web conferencing provider, e.g. FastViewer represents your screen to the session partners.
- Uploading, downloading and deleting files.
- Using a whiteboard feature in screenshot or live mode
  This enables the session participants to insert drawings and markings in the transmitted screen, which all other participants can see then. In case of the screenshot mode the displayed screen freezes to a fixed-image; in live mode the transmission continues without restriction.
- Using a chat feature
  The chat feature enables the transmission of text messages either to single participants or to all of them during the session.

With the conference configuration, all required conference data (participants, dial-in data, link for the web conferencing client and conference time) is sent by e-mail to the conference participants. In addition, the conference is entered for OpenScape UC Application participants in the conference list of the **Conferences** function window and, in case of Microsoft Outlook and Lotus Notes, automatically entered in the calendar.

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 only if their e-mail address is available in the system. If the external conference participants do not have an e-mail address, they must be informed separately, e.g. via an external e-mail address or by telephone.

7.4 Installing the OpenScape Extensions for Microsoft Outlook

General information about installing the OpenScape Extensions for Microsoft Outlook.

You install the OpenScape Extensions for Microsoft Outlook by starting the setup file `setup.exe` from the setup directory `OpenScape4Outlook`.

> ***NOTICE:*** Please note that the installation file `setup.exe` on the operating system Windows7 must not be started from the Zip archive. Because of modifications to the privilege management in Windows7 the installation will otherwise fail. Unpack the archive first, then start the installation from the unpacked directory via the context menu item **Run as administrator**.

The dialog language in which the OpenScape Extensions for Microsoft Outlook is installed on your system corresponds to the language of your currently installed Microsoft Outlook application.

7.4.1 Requirements for Setting up OpenScape Extensions for Microsoft Outlook

Installation requirements for the OpenScape Extensions for Microsoft Outlook.

Normally, when the OpenScape Extensions for Microsoft Outlook is used under a default user account in a domain, you perform the setup in two steps:

> ***NOTICE:*** If a user who has administrative privileges at his/her workstation performs the setup or the current Runtime and .Net components have already been installed, only a single installation is required.

- Installation of the OpenScape Extensions for Microsoft Outlook with administrative privileges on the relevant workstation.
  This way, some additional Windows-specific Runtime and .Net components are installed that can be installed only with administrative privileges.
- Installation of the OpenScape Extensions for Microsoft Outlook for the user account, under which this component is to be used.
  This is necessary for registering the setup of the OpenScape Extensions for Microsoft Outlook duly for this user account in the Registry under `HKEY_CURRENT_USER` .

7.4.2 How to Perform the Installation

Description of the OpenScape Extensions for Microsoft Outlook setup process.

To perform the setup, proceed as follows:

Step by Step

1. Shut down Microsoft Outlook.
2. Start the `setup.exe` with administrative privileges. To do this, use the Windows Vista or Windows 7 context menu item **Run as administrator**.

   NOTICE: When you install the Microsoft Outlook component via a network directory you encounter a security prompt that you need to confirm with a click on the **Run** button.

   If you perform the initial setup on this workstation, the dialog **OpenScape Extensions for Microsoft Outlook Setup** opens.

   NOTICE: If in the second step, the user account setup is performed, the installation of the Windows specific components are skipped in the setup.

   Depending on the operating system and the currently installed operating system components, some setup steps may follow to prepare the system for the installation of the OpenScape Extensions for Microsoft Outlook.
3. Click the **Accept** button of the **Licence Agreement for Microsoft Visual Studio 2005 Tools for Office Second Edition Runtime** to install this component. Another dialog **OpenScape Extensions for Microsoft Outlook Setup** opens.
4. Click the **Accept** button of the **Licence Agreement for Microsoft Visual Studio 2005 Tools for Office Language Pack** to install this component. Another dialog **OpenScape Extensions for Microsoft Outlook Setup** opens.
5. Click the **Install** button to install the **Microsoft Office 2003 Primary Interop Assemblies** and **2007 Microsoft Office Primary Interop Assemblies** components.

   NOTICE: This setup step is only displayed for an installation with *Microsoft Outlook 2003*.

   After you have installed this component, the dialog **OpenScape Extensions for Outlook** opens for the OpenScape Extensions for Microsoft Outlook setup.
6. Click on **Next**.

   The welcome dialog of the setup wizard opens.
7. Click on **Next** to initiate the setup process.

   The licensing dialog opens.
8. Set the **I accept the license agreement** option.
9. Click on **Next**.

The setup confirmation dialog box opens.

10. Click the **Install** button.

A new dialog opens that allows tracing the setup process:

Another dialog opens, which marks the end of the installation.

11. Click on the **Finish** button in this dialog.

The installation is complete and the setup assistant is closed.

12. Repeat these installation steps for each user account under which this component shall be used.

13. Start Microsoft Outlook under the user account that was installed for this component.

The **Initial Configuration for the OpenScape Extensions for Microsoft Outlook** dialog opens. Enter here initially the user data for your access to the OpenScape server and the data for connecting the OpenScape server. At the next *Microsoft Outlook* start, the OpenScape is connected automatically.

NOTICE: In *Microsoft Outlook 2003* you reach the settings dialog also via the menu of Microsoft Outlook. Select in the menu of *Microsoft Outlook* **Tools > Options > tab OpenScape Extensions for Microsoft Outlook > Configuration button > tab**

Network. In *Microsoft Outlook 2010* you reach the settings dialog via **File** > **OpenScape** > **doubleclick on Configuration** > **tab Network**.

In the **OpenScape Server - Access Data** section you need to make the following entries for logging on to your OpenScape user account:

User ID

Specify here your OpenScape user ID in the format *<user ID@domain>*.

Password

Enter here the OpenScape password you use for logging on to the OpenScape server.

Use Windows Authentication

Set this option if you log on with your Windows login data.

Then, for logging on to the OpenScape server, enter the data you use for logging on to your workstation in the **User ID** and **Password** input fields.

In the **OpenScape Server - Network Configuration** section, the following entries are required for connecting the OpenScape server from your workstation:

OpenScape Server - Host address

Enter here the complete network address (URL) of the OpenScape server.

OpenScape Server - Port

Enter here the network port via which the connection to the OpenScape server is configured.

NOTICE: If you do not know the Logon or connection data, please contact your system administrator.

Setup with the initial configuration for immediately connecting the OpenScape server is now complete.

NOTICE: If the OpenScape server cannot be connected after you have specified the user data, the network address and the port of the OpenScape server, the OpenScape Extensions for Microsoft Outlook cannot be configured. When invoking the configuration dialog merely the **Network** tab is displayed for connecting the OpenScape server.

You can now configure your conferences via *Microsoft Outlook* meeting requests.

7.5 Installation in a Terminal Server Environment

Installing the OpenScape Extensions for Microsoft Outlook in a Terminal Server/ Citrix environment.

The setup process may be run through only once in terminal server or Citrix environments. Setup therefore requires administrative privileges.

The program files are installed in the `Program Files` directory instead of in the local user directory under `Application Data`.

Newly added registry keys are automatically copied for all users, so that all users at the terminal server can deploy the OpenScape Extensions for Microsoft Outlook.

7.5.1 Requirements for the Installation in a Terminal Server Environment

Requirements for installing the OpenScape Extensions for Microsoft Outlook in a Terminal Server environment.

The following requirements must be complied with for the setup:

- The option for local users to log on to the terminal server must be temporarily inactive.
- All user must be logged off.
- The setup mode must have been released.

7.5.2 How to Perform the Installation in a Terminal Server Environment

Installing the OpenScape Extensions for Microsoft Outlook in a Terminal Server environment.

Setup requires the following steps:

Step by Step

1. Start the command prompt (**Start** > **Run** > **cmd**).
2. Enter the following command in the command prompt:

   change logon /disable
3. Log all users off of the system.
4. Enter the following command in the command prompt:

   change user /install
5. Install OpenScape Extensions for Microsoft Outlook via the provided setup package.
6. Enter the following command in the command prompt:

   change user /execute
7. Enter the following command in the command prompt:

   change logon /enable

Setting up the Outlook conference extension in a terminal server environment is now complete.

7.5.3 User Configuration Files for Terminal Server Environments

Configuring user configuration files for a Terminal Server environment.

In case of a standard setup, the user configuration is stored in a local user directory:

`...\Documents and Settings\<user profile>\Local Settings\Application Data\Siemens\UCSolutions`

These directories are not replicated to other servers in a terminal server environment (with or without Citrix). Therefore, users are prompted to specify their configuration data each time they log on to a new terminal server.

To avoid this, the system administrator can determine that the configuration files are copied to a system-wide available directory by default during the OpenScape Extensions for Microsoft Outlook installation:

`...\Documents and Settings\<user profile>\Application Data\Siemens\UCSolutions`

For this purpose, you find the following file in the setup directory: `UseSys-AppData.reg`

Using this file, the installation can be performed in a way that the user configuration data is stored in this directory and the access path addresses this directory system-wide.

To restore the default behavior you can use the following file: `UseLocalAp-pData.reg`

It is also contained in the setup directory.

7.6 Repairing, Upgrading and Uninstalling the OpenScape Extensions for Microsoft Outlook

Introductory description of how to repair (update), upgrade (installing a subsequent version) or uninstall the OpenScape Extensions for Microsoft Outlook.

You can update, upgrade or uninstall the client application OpenScape Extensions for Microsoft Outlook also via the setup program (`setup.exe`).

7.6.1 How to Perform a Repair (Update) Installation for the OpenScape Extensions for Microsoft Outlook

Repairing (updating) the OpenScape Extensions for Microsoft Outlook.

If a current version of the OpenScape Extensions for Microsoft Outlook shall be repaired after the installation, proceed as follows:

Step by Step

1. Shut down Microsoft Outlook.
2. Start the current `setup.exe` of the installation program for the OpenScape Extensions for Microsoft Outlook.
3. Click on the **Next** button in the setup's welcome dialog.

   Up comes this dialog:

4. Click on the **Repair** button in this dialog.

   The confirmation dialog for the update installation opens.
5. Click on the **Repair** button in this confirmation dialog.

   The setup process starts and a new dialog opens that allows tracing the setup process. Another dialog opens, which marks the end of the installation.
6. Click on the **Finish** button in this dialog.

The update installation is complete and the setup assistant is closed.

7.6.2 How to Perform an Upgrade Installation for the OpenScape Extensions for Microsoft Outlook

Installing a more recent OpenScape Extensions for Microsoft Outlook version.

If a current version of the OpenScape Extensions for Microsoft Outlook is to be set up after the installation, proceed as follows:

Step by Step

1. Shut down Microsoft Outlook.
2. Start the current `setup.exe` of the installation program for the OpenScape Extensions for Microsoft Outlook.
3. Click on the **Next** button in the setup's welcome dialog.

   Up comes this dialog:

4. Click on the **Upgrade** button in this dialog.

   The confirmation dialog for the upgrade installation opens.
5. Click on the **Upgrade** button in this dialog.

   The setup process starts and a new dialog opens that allows tracing the setup process. Another dialog opens, which marks the end of the installation.
6. Click on the **Finish** button in this dialog.

The update installation is complete and the setup assistant is closed.

7.6.3 Uninstalling the OpenScape Extensions for Microsoft Outlook

Uninstalling the OpenScape Extensions for Microsoft Outlook.

How to remove the application OpenScape Extensions for Microsoft Outlook from your local system:

Step by Step

1. Close Microsoft Outlook.
2. Start the current `setup.exe` of the installation program for the OpenScape Extensions for Microsoft Outlook.
3. Click on the **Next** button in the setup's welcome dialog.

   Up comes this dialog:

4. Click on the **Remove** button in this dialog.

   The confirmation dialog for removing the application opens.
5. Click on the **Remove** button in this confirmation dialog.

   The uninstallation process starts and a new dialog opens which allows you to observe the uninstallation process. Another dialog opens, which marks the end of the uninstallation.
6. Click on the **Finish** button in this dialog.

The uninstallation is complete and the setup assistant is closed.

7.7 Configuring the OpenScape Extensions for Microsoft Outlook

Configuration options for the OpenScape Extensions for Microsoft Outlook.

You can perform/change the settings for OpenScape Extensions for Microsoft Outlook in configuration dialogs.

NOTICE: If invoking the configuration pages merely displays the **Network** tab, the OpenScape server could not be connected yet. In this case, try to connect the OpenScape server by specifying the user data, the network address and the port of the OpenScape server.

The following tabs are available for configuring the OpenScape Extensions for Microsoft Outlook:

- **Network**
  Use this dialog to perform the settings for the user access and the connection to the OpenScape server.
- **Audio / Video conference**
  Use this dialog to perform the settings for voice and video conferences.
- **Web conference**
  Use this dialog to perform the settings for web conferences.
- **Presence Status**
  Use this dialog to perform the settings for copying the conference appointments in order to control the presence status.
- **User Interface**
  Use this dialog to define if the default configuration data should be used to create the conference or if you want to set the configuration data for each conference separately. Additionally, you can set the language for the invitation text here.

You reach the configuration dialogs via the *Microsoft Outlook* menu bar. In the *Microsoft Outlook menu, select* **Tools** > **Options** > **OpenScape Extensions for Outlook** tab > **Configuration** button.

Click the **OK** button to save your settings and to close the settings dialog.

Click the **Cancel** button to discard your settings. The **OpenScape Configuration** settings dialog is closed.

NOTICE: Configuration modifications require a *Microsoft Outlook* restart to take effect.

7.7.1 Configuring the Network

The configuration settings for connecting the OpenScape server.

In the **Network** dialog, you can modify the initial setting data for your user access and the connection to the OpenScape server or enter this data if you have not performed this settings in the **Initial Configuration** dialog yet.

In *Microsoft Outlook 2003* you reach this settings dialog via the menu bar. Select in the menu of Microsoft Outlook **Tools > Options > tab OpenScape Extensions for Microsoft Outlook > Configuration button > tab Network**. In *Microsoft Outlook 2010* you reach the settings dialog via **File > OpenScape > doubleclick on Configuration > tab Network.**

In the **OpenScape Server - Network access** section you need to make the following entries for logging on to your OpenScape user account:

- **User ID**
  Specify your user ID in the format *<user-ID@domain>*.
- **Password**
  Enter the password you use to log on to the OpenScape server.
- **Use Windows Authentication**
  Set this option if you log on with your Windows login data.
  Then, for logging on to the OpenScape server, enter the data you use for logging on to your workstation in the **User ID** and **Password** input fields.

In the **OpenScape Server - Network configuration** section, the following entries are required for connecting the OpenScape server from your workstation:

- **OpenScape Server - Host address**
  Enter here the complete network address (URL) of the OpenScape server.
- **OpenScape Server - Port**
  Enter here the port via which the connection to the OpenScape server is configured.

NOTICE: If you do not know the Logon or connection data, please contact your system administrator.

7.7.2 Audio / Video Conference Configuration

Configuration of the audio / video conference default settings.

In the **Audio /Video Conference** dialog you can perform default settings for your audio conferences and schedule a video conference.

You reach this configuration dialog via the *Microsoft Outlook* menu bar. Select in the *Microsoft Outlook* menu **Tools** > **Options** > **Outlook** tab > **Configuration** button > **Audio/Video conference** tab.

The **Audio conference** section provides the following configuration options:

- **Record name**
  If you select this option, each conference participant is requested to specify his/her name before joining the conference. Only after recording their name, they can join the conference.
- **Moderated conference**
  Use this option to determine whether to configure moderated or open conferences as default.

  NOTICE: Only the moderator can start and control moderated conferences.

- **Call direction**
  Select the corresponding option to define whether the conference participants are called by the system have to dial into the conference by themselves

– If you have configured that the conference participants will be called by the system, the conference will start automatically when the start time is reached. Then, all conference participants are called by the system. At the same time, the web conference, if configured, will also start.

  NOTICE: The web conference start must be confirmed by the moderator or the conference creator.

– If you have configured that the conference participants need to dial into the conference by themselves, the conference is started when the first conference participant has dialed in via the bridge number and the conference PIN. As long as this conference participant is the only one, he/she hears music-on-hold. When the next conference participant joins the conference, the conference will be opened.

  NOTICE: After you have dialed in or received the conference call, the system prompts you to join the conference. Click on to join the conference to reject to take part in the conference.

In the **Video conference** section, you can activate the checkbox **Add video conference** to configure the audio conference so that your conferences are always prepared for a video conference.

7.7.3 Configuring Web Conferences

Configuration of the web conference default settings.

You can default set your web conferences in the **Web Conference** dialog.

You reach this configuration dialog via the *Microsoft Outlook* menu bar. Select in the *Microsoft Outlook menu* **Tools** > **Options** > **OpenScape Extensions for Outlook** tab > **Configuration** button > **Web conference** tab.

The top section under **Web conference provider access data** shows the properties of the web conference connections used. Additional tabs indicate that several web conference providers are available. Each tab represents one web conference provider.

In the bottom section under **Web conference default settings** you can use the **Add web conference** option to set that a web conference is automatically created with each conference you configure. The **Preferred web conference provider** combo box serves for selecting the desired web conference provider if several web conference provider are available.

7.7.4 Configuring the Presence Status

Configuring the presence synchronization.

Use the **Presence** dialog to perform the settings that update your presence state on the OpenScape server.

You reach this configuration dialog via the Microsoft Outlook menu bar. Select in the *Microsoft Outlook menu* **Tools** > **Options** > **OpenScape Extensions for Outlook** tab > **Configuration** button > **Presence** tab.

The **Presence configuration** section provides the following configuration options:

- **Use presence synchronization**
  When you select this option, the OpenScape presence status is automatically synchronized with your *Microsoft Outlook* calendar data.
  The presence status synchronization triggers the following operational behavior:
  - Independently of the presence status set before, your presence status changes automatically to the "In Meeting" status when an appointment or a meeting begins. This setting will be kept for the duration of the appointment or meeting.
  - If a Microsoft Outlook user answers a meeting request with "Tentative", his/her presence state set before will be kept.
  - At the end of the appointment or the meeting, the status "In Meeting" will change back to the status set before.
  - If a user changes his/her status during an appointment or a meeting, e. g. by using another client application, the status is not synchronized. This presence status set manually will then apply to this user and be displayed.
- **Update time in seconds**
  Click in the field in order to change the default time (60 seconds). Enter a new value for the synchronization time. Recommended values are 60 (1 minute), 600 (10 minutes), 900 (15 minutes) or 1800 (30 minutes) in order to achieve an ideal synchronization depending on the concentration of appointments.

7.7.5 Configuring the User Interface

Configuring the user interface.

Use the **User interface** dialog to perform the settings for the conference user interface.

You reach this configuration dialog via the Microsoft Outlook menu bar. Select in the Microsoft Outlook menu **Tools** > **Options** > **OpenScape Extensions for Outlook** tab > **Configuration** button > **User interface** tab.

The **Conference user interface** section provides the following configuration option:

- **Use default conferencing options**
  Select this option to skip the settings dialog which is normally opened for the individual configuration of your conferences when you push the **OpenScape Add conference** button. That means that all conferences to be created are configured with the default settings that you defined before on the configuration pages.

  NOTICE: You cannot change the configuration settings of an added conference retrospectively.

The **Invitation text** section provides the following configuration option:

- **Language**
  In the **Language** combo box, select the language in which the invitation text will be sent to the conference participants via the meeting request. From the available languages, select the one you need as default setting for your conference invitations. By default, the invitation text first uses the language in which your Microsoft Outlook client has been installed.

7.8 Configuring, Editing, Deleting, and Controlling Conferences

Operating options for the OpenScape Extensions for Microsoft Outlook.

After you have installed the OpenScape Extensions for Microsoft Outlook you can use the following operating options:

- Configuring conferences.
  You can schedule one-time or recurrent meet-me conferences via the Microsoft Outlook calendar. Depending on the system environment, you can choose between the following conference types:
  - Audio conferences
  - Web conferences
  - Video conferences
- Editing conferences.
  This comprises:
  - Changing conference data before sending the conference invitation.
  - Changing conference data after sending the conference invitation.
  - Starting audio conferences.
  - Starting web conferences.
- Controlling conferences.
  You can control an active audio conference via:
  - The keypad of your telephone
  - The call control of your OpenScape Desktop Client Enterprise Web Embedded Edition or your OpenScape Web Client.
- Deleting conferences.
  You can delete your configured conferences from your Outlook calendar anytime.

NOTICE: When deleting conferences, verify that no "orphaned" conferences remain. "Orphaned" conferences are conferences to which no appointment is assigned anymore after they have been deleted from the Outlook calendar. How to delete conferences correctly describes section *Deleting Conferences*.

7.8.1 How to Configure a Conference

Configuring a conference via the *Microsoft Outlook* calendar.

How to configure a conference:

Step by Step

1. Click in Outlook 2003 or Outlook 2007 on the small triangle icon next to the **New** button or in Outlook 2010 on **New Items**.

   The message selection menu opens.

2. Select from this menu the function **Meeting Request** or **Meeting** in Outlook 2010.

NOTICE: You can also reach this dialog via **File** > **New** > **Meeting Request**.

The **Untitled - Meeting** dialog opens.

3. If required, configure if you would like to create a recurrent conference. To this, push the **Recurrence** button in the toolbar. In the **Appointment Recurrence** dialog, enter the corresponding data.

4. Enter the conference participants in the address line.

NOTICE: Via the **To** button you can browse the Microsoft Outlook address books or your contact lists for participants and select them.

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5. Specify a meeting **subject** in the corresponding input line.

> ***NOTICE:*** The subject describes the conference. Under this description the conference will be logged in the message respectively conference journal.

6. Use the **Start time** and **End time** combo boxes to schedule the conference.
7. Click on the **AddOpenScape conference** icon.

   Depending on your configuration settings the **OpenScape Conference** dialog opens, or the conference data are immediately displayed in the bottom section of the ***<Subject>* - Meeting** dialog.

> ***NOTICE:*** This dialog opens during the creation of a conference only if you have not selected the **Use default conference options** option while performing configurations on the **User Interface** tab.

8. Select the following options in the **Audio Conference** section:
   - **Record name**

     Leave this option activated if you wish to have the names of the conference participants recorded, or deactivate it otherwise.

> ***NOTICE:*** If this checkbox is active, the conference participants need to specify their names before they can take part in the conference.

- **Moderated conference/open conference**

  Leave this checkbox activated if you wish to have a moderated conference. Deactivate this option if you wish to create an open conference.

  A moderated conference requires the presence of a moderator. As long as the moderator is not in the conference, the other conference participants hear music-on-hold until the moderator join the conference.

  The moderator of a moderated conference has more options to control the conference than the other participants of the moderated conference.

  In case of an open conference the conference starts as soon as the first conference participant is in the conference. The conference now takes place with the participants who successively dial in.

  In an open conference, all conference participants have the same options to control the conference.

- **Call direction**

  Select the corresponding option to define whether all conference participants are called by the system or have to dial into the conference by themselves .

9. Select the following options in the **Web Conference** section:

- **Add web conference**

  Set this radio button if you want to create a web conference and an audio conference simultaneously.

- **Preferred web conference provider**

  If several providers are available, you can select the conference provider from this combo box.

10. In the **Invitation text** section, select via the **Language** combo box the language for the invitation text. In this language, the invitation text will be sent to all conference participants via the meeting request.

11. In the **Video conference** section, select whether you would like to configure additionally a video conference.

The invitation text contains the additional information "** This conference supports video.*".

12. Click on **OK** after having made your selection.

The dialog is closed and the conference data is displayed in the language configured in the bottom section of the ***<Subject>* - Meeting** dialog.

The conference access data are in detail:

In the **Voice** section:

The bridge number(s) the conference participants require to log on to the conference and the conference PIN that the conference participants use to authenticate themselves.

In the **WEB** section:

Two links for opening the required web conference client:

You can use the first link for downloading a separate stand-alone client for the web conferencing session.

The second link enables loading a web-based client for the web conference.

13. In the ***<Subject>* - Meeting** dialog, click on the **Send** button.

The meeting request is sent do the addressed system users and the ***<Subject>* - Meeting** dialog is closed. All required information such as conference access data, meeting time and subject is delivered to the selected participants and entered in their Outlook calendar as appointment.

When the conference is created, the conference is entered with its data in the conference list of each OpenScape UC Application conference participant in all OpenScape UC Application clients at the same time.

NOTICE: Bear in mind that you must communicate the conference information (bridge number and PIN) to external conference participants (participants without OpenScape UC Application user account) via a separate e-mail or other means of communication.

7.8.2 Editing the Conference before Sending the Conference Data

Editing a configured conference before sending the meeting request.

You have configured a conference by selecting the relevant participants, the subject and the conference time and by clicking on the **AddOpenScape Conference** button.

After you have carried out these actions, the ***<Subject>* - Meeting** dialog displays the two buttons for editing the conference:

- **OpenScape Delete conference**
  Deletes the configured conference from your own conference list and from the conference lists of the invited participants.

- **Join conference**
  Using this option you can join the conference.

  NOTICE: If a web conference has been configured in addition, the **Start Web Conference** icon becomes active after the start of the OpenScape conference. You can use this icon to start the web conference from the calendar dialog of Microsoft Outlook.

7.8.3 Editing the Conference after Sending the Conference Data

Editing a configured conference after sending the meeting request.

After you have sent the conference data, the conference date is entered in your Outlook calendar. You can reopen the conference data for editing by double-clicking the conference calendar-entry.

The two buttons for editing the conference are now available:

- **OpenScape Delect conference**
  Deletes the configured conference from your own conference list and from the conference lists of the invited participants.

  NOTICE: The sent conference notifications are not deleted.

- **Join conference**
  Using this option you can join the conference.

  NOTICE: If a web conference has been configured in addition, the **Start Web Conference** icon becomes active after the start of the OpenScape conference. You can use this icon to start the web conference from the calendar dialog of Microsoft Outlook.

7.8.4 Deleting Conferences

Deleting conferences created via OpenScape Extensions for Microsoft Outlook.

NOTICE: Once a conference is started you cannot delete it. You can only delete the calendar entry (appointment). Because conferences are started with an advance period, you may not be able to delete them even shortly before the scheduled start time.

To delete conferences you must take one of the actions proposed below to avoid that "orphaned" conferences are displayed in the OpenScape Desktop Client Enterprise Web Embedded Edition or the OpenScape Web Client conference lists. "Orphaned" conferences are conferences to which no appointments are assigned any more after being deleted from the Microsoft Outlook calendar.

"Orphaned" conferences in the OpenScape Desktop Client Enterprise Web Embedded Edition or the OpenScape Web Client may result, for example, from the following delete actions:

- Deleting a conference entry from the Microsoft Outlook calendar main view.
- Deleting the conference entry via the calendar access of your mobile device.
- Deleting the conference entry via Outlook Web Access (OWA).

To delete the conference created via the OpenScape Extensions for Microsoft Outlook without leaving "orphaned" conference entries in the OpenScape Desktop Client Enterprise Web Embedded Edition or the OpenScape Web Client, you must first open the corresponding conference entry with a doubleclick. After this, you have two options to delete the conference entry successfully:

- You can delete the conference via the opened conference entry by pushing the **Delete OpenScape Conference** button.
- Deleting the conference via the open conference entry by using the delete functions in *Microsoft Outlook* (**File** menu > **Delete** or toolbar).

NOTICE: In case of Microsoft Outlook 2003, when deleting via menu **File** > **Delete** or toolbar , you need to select "Send cancellation and delete meeting" as deletion option.

7.8.5 Starting the Audio Conference

Start-up behavior of the audio conference.

An audio conference starts in most cases automatically when the start time has been reached (scheduled conferencing). However, in case of a moderated conference the moderator can start it manually beforehand. If the audio conference is an open one, it can also be started manually or by any conference participant dialing in. Depending on your conference configuration, the server triggers the following functions at the conference start:

- **The system calls all conference participants.**
- **All conference participants need to dial into the conference by themselves.**

The conference participants are called by the system

If you have configured that the conference participants will be called by the system, the conference will start automatically when the start time is reached. Then, all conference participants are called by the system. If the moderator has started the conference beforehand, all conference participants are called at this time.

The conference participants dial into the conference by themselves

If you have configured that the conference participants need to dial into the conference by themselves, the conference starts automatically when the start time is reached. The conference participants can then dial into the conference. If another conference participant has started the conference beforehand (manually or by dialing in), he/she hears music-on-hold as long as he/she is the only participant. When the next conference participant joins the conference, the conference will be opened.

NOTICE: After you have dialed in or received the conference call, the system prompts you to join the conference. Click on 1 to join the conference or on 2 to refuse taking part in the conference.

7.8.6 How to Dial into an Audio Conference

Joining an audio conference.

How to dial into the conference:

Step by Step

1. Open the meeting entry of the relevant conference in the Microsoft Outlook calendar.
2. Dial into the conference under the **Bridge Number** specified here when the conference start is due.
3. Enter the **Conference PIN** via telephone when the system prompts you to do so. This identifies you as authorized conference participant.

You have now joined the conference.

7.8.6.1 Controlling a Conference via the Call Control

Controlling a conference via the "Call Control" function dialog.

The following features are available in the **Call Control** function window for controlling an active conference:

In the header

- **Lock conference**
  This feature is only available for participants with moderator or creator privileges. This option blocks the conference for other subscribers who want to join in. After you have clicked on the icon it changes to .
- **Unlock conference**
  Releases the conference locking. After you have clicked on the icon it changes to .

- **Mute conference**
  This feature is only available for participants with moderator or creator privileges. It interrupts the sound transmission to all conference participants. After you have clicked on the icon it changes to .
- **Unmute conference**
  This feature is only available for participants with moderator or creator privileges. It cancels the conference muting.
- **End conference**
  This feature is only available for participants with moderator or creator privileges. It ends the conference by closing down the connections to the other conference participants.
- **Start 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.

During the connection representation of the conference participants

> ***NOTICE:*** The connection representation shows all participants who are currently in the conference. In a moderated conference, the moderator is indicated by a dot that precedes his/her name entry. The name of the conference participant who is currently active (thus talking) is highlighted in boldface.

- **Handover and continue active connection**
  This feature allows every conference participant to hand his/her conference connection over to another device and continue taking part in the conference from there.
- **Mute participant**
  It interrupts the sound transmission for a conference participant. After you have clicked on the icon it changes to .
- **Unmute 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 conference
  Enables every participant to leave the active conference. As soon as every participant has left the ad-hoc conference, the conference ends.

  NOTICE: After 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.

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.

7.8.6.2 Controlling a Conference via Telephone

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. The default setting for having the menu functions put out by announcement is * *. In case of doubt please contact your administrator.

Activating the Control Menu

You control a conference by entering two key commands on the keypad of your phone. This prevents conference disruptions by a telephone key being pushed inadvertently.

NOTICE: The administrator can change the telephone key/ command assignment. The following description refers to the system default setting.

Control Commands

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

- * * **Play menu**
  The available menu options are announced to you.

- * 2 **Lock/unlock conference.**
  This feature is only available for participants with moderator or creator privileges. Once the conference has been locked, no further participants may dial in. Pushing this key once more undoes the restriction.
- * 3 **Activate/lift muting.**
  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 **Activate/lift conference muting.**
  This feature is only available for participants with moderator or creator privileges. 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 # pound key. For further proceedings, please follow the voice prompts.
- * 9 **Turn off 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.

7.8.7 Starting a Video Conference Connection

How to set up a video conference connection.

With the corresponding requirements met, you can extend an audio conference to a video conference. Requirements are e.g. server licenses and video-compatible devices or clients.

When you select the **Add Video Conference** option upon configuring the conference, the video dialog opens automatically at the conference start. The user only needs to release sending his/her own video image for starting the video streaming. When the conversational partners release their video streaming, too, all conference participants can see each other.

The bottom left area of the video screens displays the participant name respectively participant number. In case of a moderated conference, the video screen features the moderator icon , which precedes the moderator's text entry.

The video screen of the currently active speaker is highlighted by a colored frame. In addition, the participant name or number of the active speaker appears in boldface.

NOTICE: Users who take part in the conference via a pure voice connection see a text field in the video dialog when they are currently active as speaker. This text field displays the participant name or number of this user.

7.8.8 Starting/Joining a Web Conference

Starting a web conference.

After the audio conference has been started, an additionally configured web conference can be started by the user who has created it. To this, he/she first needs to download the web conference client via the Start Web Conference button. How to proceed:

- Via *Microsoft Outlook*
  - Click on the **Start Web Conference** icon if you are the moderator of the conference or the person who created the conference. This starts the web conference and downloads the web conference client for the web conference.
- Via the OpenScape Web Client or the OpenScape Desktop Client Enterprise Web Embedded Edition
  - In the call control already open for the active audio conference, click on the **Start Web Conference** icon if you are the moderator of the conference or the person who created the conference. This starts the web conference and downloads the web conference client for the web conference.

  NOTICE: Operating the web conference client is described in the *OpenScape Web Collaboration V1* manual.

Joining a web conference

How to join the web conference after it has been started:

- Via *Microsoft Outlook*
  - Click on one of the two links for using either the separate stand-alone client or the web-based one.
    Open the meeting entry of the relevant conference in the *Microsoft Outlook* calendar and click on the corresponding link. The conference client for the web conference starts.
- Via the OpenScape Web Client or OpenScape Desktop Client Enterprise Web Embedded Edition:
  - In the call control already open for the active audio conference click on the **Start Web Conference** icon. This downloads the web conference client for the web conference.

  NOTICE: Operating the web conference client is described in the *OpenScape Web Collaboration V1* manual.

8 OpenScape Extensions for Lotus Notes

General Description of the OpenScape Extensions for Lotus Notes

After you have installed the OpenScape Extensions for Lotus Notes, the Lotus Notes client provides features for scheduling server-based Meet Me conferences via a meeting request in the Lotus Notes calendar. Among server-based conferences you find:

- Audio conferences
- Web conferences
- Video conferences

When the conference extensions are installed, the button

Add OpenScape conference

is displayed in the toolbar of the dialog for scheduling an appointment.

The conference is performed via the OpenScape UC Application server.

NOTICE: The default system configuration plays a short signal tone audible to all conference participants when a conference participant joins or leaves the conference. In case of a larger number of conference participants joining or leaving this signal tone may become annoying to the others. It is therefore not played anymore when the number of conference participants exceeds 15.

8.1 Requirements for Use

Requirements for using the OpenScape Extensions for Lotus Notes.

The OpenScape Extensions for Lotus Notes has been released only for specific Windows operating systems and Lotus Notes versions.

You find current and detailed information about the supported operating systems and versions of the usable Lotus Notes clients in the *OpenScape UC Application Planning Guide* manual.

You need to perform some configurations on the Lotus Domino server for installing the OpenScape Extensions for Lotus Notes. You find information about these preparations in the manual "*OpenScape UC Application V6 Configuration and Administration*" in Chapter "*Configuring the Lotus Domino Server for the OpenScape Conference Extension*".

8.2 Meet Me Conferences

The definition of meet-me conferences.

Meet Me conferences are voice conferences planned and configured in advance.

Meet-me conferences can be scheduled conferences that start automatically at a specific time. They can also be conferences started any time either manually by the moderator or automatically with the first participant who dials in.

A conference does not begin at the actual start time but somewhat earlier. This advance period is defaulted by a system configuration. It serves for balancing out minor differences between the system times of the conference participants, thus avoiding failed dial-ins.

If the defaulted conference duration was too short, it is automatically prolonged following the defaults in the system configuration. Such prolongations are defined in accordance with the overall duration of conferences configured in the system. The default-set value for a prolongation is 30 minutes.

In addition, a Meet Me conference can be designed as moderator-controlled or open conference. Several conference participants can be defined as moderators. This determines the conference proceedings.

The following actions end a Meet Me conference:

- The last moderator (moderated conference) leaves the conference by terminating the conference call. This triggers a grace period that allows other conference participants to end the conference also. When the grace period has expired, the conference ends.
- The last conference participant (open conference) logs out of the conference by terminating the conference call.

Scheduled conference

In case of a scheduled conference, the conference creator sets the start time and duration of the conference in accordance with the overall duration of conferences configured in the system.

Please note the following for a moderated and scheduled conference:

- If the moderator leaves the conference during the initially scheduled period, the conference persists until the initially scheduled end time. So, the other conference participants can resume the conference.
- If the moderator leaves the conference during a conference prolongation, the grace period starts when the moderator terminates the conference call. The grace period enables the other conference participants to end the conference also. When the grace period has expired, the conference ends.

Unscheduled conference

In case of an unscheduled conference you (as conference creator) need to start the conference manually. After the conference start the conference remains active within the scope of the overall duration of conferences configured in the system until the last conference participant has logged out by terminating the conference call.

Please note the following for a moderated and unscheduled conference:

- If the moderator leaves the conference during the initially scheduled period, the grace period starts when the moderator terminates the conference call. The grace period enables the other conference participants to end the conference also. When the grace period has expired, the conference ends.
- If the moderator leaves the conference during a conference prolongation, the grace period starts when the moderator terminates the conference call. The grace period enables the other conference participants to end the conference also. When the grace period has expired, the conference ends.

Open conference

An open conference is a meet-me conference in which all participants have equal control privileges. The conference starts automatically either at a scheduled time or with the first participant who dials in or manually with the first conference participant who dials in. The conference configuration allows two ways of joining in: Participants are either called automatically by the system after the conference start (dial-out) , or they need to dial in by themselves (dial-in) . You create an open conference by activating the **Open Conference** checkbox in the **Create conference** dialog.

Moderated conference

A moderated conference is a meet-me conference in which only the conference creator has the control privilege as moderator. The conference starts automatically at the scheduled time if such a point in time has been configured. If no start time has been defined, the moderator can start the conference manually or by dialing into the conference. Depending on the configuration, the conference participants can dial into the conference (dial-in) or are called by the system (dial-out) . When the moderator leaves the conference, it comes automatically to an end for the other participants, too. A moderated conference is created by the conference creator deactivating the **Open Conference** check box in the **Add Conference** dialog.

8.3 Web Conferences

Definition of 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 system you can integrate different web conferencing providers.

The web conferencing application OpenScape Web Collaboration Embedded is shipped with OpenScape UC Application by default. A moderator decides which participant may present his/her screen and who is in control of the presented screen. Likewise, the moderator can present his/her own screen and have it controlled.

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

Other web conferencing providers can be configured for use in a project-specific installation.

Check the combo box for selecting the web conferencing provider to see which web conferencing providers are available to you.

> ***NOTICE:*** Please obtain the operating instructions for the single web conferencing applications from the manuals of the respective web conferencing provider.
>
> If you can choose from several web conferencing providers, it is useful to deploy one specific web conferencing provider only. Since the features of all web conferencing providers vary only slightly, you need to familiarize yourself with only one web conferencing application.

> ***NOTICE:*** You find a guide to using and operating the OpenScape Web Collaboration web conferencing application as well as feature descriptions in the *OpenScape Web Collaboration V1* user manual.

Clients you can use for Web Conference

You can use the web conferencing feature on Windows-based systems only.

> ***NOTICE:*** You find information about Windows operating systems that can be used for staging web conferences in the *OpenScape UC Application V6 Planning Guide* manual.

You can stage a web conference alternatively via the following clients:

- A separate stand-alone client, which is downloaded and started for a web conferencing session.
- A web-based client that can be reached via a specific URL.

What is a Web Conferencing Application?

In OpenScape UC Application you can realize the web conferencing feature by different web conferencing applications. 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.

All in all the web conferencing function is similar to the one of a video/audio conference with the difference that the desktop of a user is transmitted instead of a video stream. This transmission can be controlled by the moderator or a participant if he/she has been granted the corresponding privilege.

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 member to remotely control the mouse and keyboard of the computer the desktop of which is currently displayed. He/she can thus operate the computer.

Further features of a web conferencing application are:

- Application selection
  You use this feature to specify the applications and screen elements to be visible to the session partners.
- Monitor control
  Via this feature you control how the web conferencing provider, e.g. FastViewer represents your screen to the session partners.
- Uploading, downloading and deleting files.
- Using a whiteboard feature in screenshot or live mode
  This enables the session participants to insert drawings and markings in the transmitted screen, which all other participants can see then. In case of the screenshot mode the displayed screen freezes to a fixed-image; in live mode the transmission continues without restriction.
- Using a chat feature
  The chat feature enables the transmission of text messages either to single participants or to all of them during the session.

With the conference configuration, all required conference data (participants, dial-in data, link for the web conferencing client and conference time) is sent by e-mail to the conference participants. In addition, the conference is entered for

OpenScape UC Application participants in the conference list of the **Conferences** function window and, in case of Microsoft Outlook and Lotus Notes, automatically entered in the calendar.

> ***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 only if their e-mail address is available in the system. If the external conference participants do not have an e-mail address, they must be informed separately, e.g. via an external e-mail address or by telephone.

8.4 Installing the OpenScape Extensions for Lotus Notes

General information about installing the OpenScape Extensions for Lotus Notes.

> ***NOTICE:*** You need to perform some configurations on the Lotus Domino server for installing the OpenScape Extensions for Lotus Notes. You find information about these preparations in the manual "*OpenScape UC Application V6 Configuration and Administration*" in Chapter "*Configuring the Lotus Domino Server for the OpenScape Conference Extension*".

You install the OpenScape Extensions for Lotus Notes by starting the setup file `setup.exe` from the setup directory `OpenScape4LotusNotes`.

> ***NOTICE:*** The dialog language in which the OpenScape Extensions for Lotus Notes is installed on your system corresponds to the language of your currently installed Lotus Notes application.

8.4.1 Requirements for Setting up OpenScape Extensions for Lotus Notes

Installation requirements for the OpenScape Extensions for Lotus Notes.

Normally, when the OpenScape Extensions for Lotus Notes is used under a default user account in a domain, you perform the setup in two steps:

> ***NOTICE:*** If a user who has administrative privileges at his/her workstation performs the setup or the current Runtime and **.Net** components have already been installed, only a single installation is required.

- Installation of the OpenScape Extensions for Lotus Notes with administrative privileges on the relevant workstation.
  This way, some additional Windows-specific Runtime and **.Net** components are installed that can be installed only with administrative privileges.
- Installation of the OpenScape Extensions for Lotus Notes for the user account, under which this component is to be used.
  This is necessary for registering the setup of the OpenScape UC Application Conference Extensions duly for this user account in the Registry under `HKEY_CURRENT_USER` .

8.4.2 How to Perform the Installation

Description of the OpenScape Extensions for Lotus Notes setup process.

To perform the setup, proceed as follows:

Step by Step

1. Close the Lotus Notes client.
2. Start the `setup.exe`.

   NOTICE: When you install the Lotus Notes component via a network directory you encounter a security prompt that you need to confirm with a click on the **Run** button.

3. Click on **Next**.

   The welcome dialog of the setup wizard opens.
4. Click on **Next** to initiate the setup process.

   The licensing dialog opens.
5. Set the **I accept the license agreement** option.
6. Click on **Next**.

   The setup confirmation dialog box opens.
7. Click the **Install** button.

   A new dialog opens that allows tracing the setup process:

   Another dialog opens, which marks the end of the installation.
8. Click on the **Finish** button in this dialog.

   The installation is complete and the setup assistant is closed.
9. Start your Lotus Notes client.

The **Initial configuration** dialog opens: Enter here initially the user data for your access to the OpenScape server and the data for connecting the OpenScape server. At the next start of your Lotus Notes client, the OpenScape is connected automatically.

NOTICE:

You can also reach this setting dialog via the configuration settings. To this, go to the Lotus Notes dialog **Calendar** and push the **Configuration** Configuration button.

In the **OpenScape Server - Access Data** section you need to make the following entries for logging on to your OpenScape user account:

OpenScape User ID

Specify here your user ID for the OpenScape UC Application in the format *<user ID@domain>*.

OpenScape - Password

Enter the password you use to log on to the OpenScape server.

In the **OpenScape Server - Network Configuration** section, the following entries are required for connecting the OpenScape server from your workstation:

OpenScape Server - Host Address

Enter here the complete network address (URL) of the OpenScape server.

OpenScape Server - Port

Enter here the network port via which the connection to the OpenScape server is configured.

NOTICE: If you do not know the Logon or connection data,

please contact your system administrator.

Setup with the initial configuration for immediately connecting the OpenScape server is now complete.

NOTICE: If the OpenScape server cannot be connected after you have specified the user data, the network address and the port of the OpenScape server, the OpenScape Extensions for Lotus Notes cannot be configured. When invoking the configuration dialog merely the **Network** tab is displayed for connecting the OpenScape server.

Now you can create your conferences by creating a new calendar entry in Lotus Notes.

8.5 Updating and Uninstalling the OpenScape Extensions for Lotus Notes

Introductory description of repairing (updating) or uninstalling the OpenScape Extensions for Lotus Notes.

You update the client application OpenScape Extensions for Lotus Notes or uninstall it via the setup program (`setup.exe`) also.

8.5.1 How to Perform an Update Installation for the OpenScape Extensions for Lotus Notes

Repairing (updating) the OpenScape Extensions for Lotus Notes.

If a current version of the OpenScape Extensions for Lotus Notes is to be set up after the installation, proceed as follows:

Step by Step

1. Close the Lotus Notesclient.
2. Start the current `setup.exe` of the installation program for the OpenScape Extensions for Lotus Notes.
3. Click on the **Next** button in the setup's welcome dialog.

Up comes this dialog:

4. Click on the **Repair** button in this dialog.

   The confirmation dialog for the update installation opens.

5. Click on the **Repair** button in this confirmation dialog.

   The setup process starts and a new dialog opens that allows tracing the setup process. Another dialog opens, which marks the end of the installation.

6. Click on the **Finish** button in this dialog.

The update installation is complete and the setup assistant is closed.

8.5.2 How to Perform an Upgrade Installation for the OpenScape Extensions for Lotus Notes

Installing a more recent OpenScape Extensions for Lotus Notes version.

If a current version of the OpenScape Extensions for Lotus Notes is to be set up after the installation, proceed as follows:

Step by Step

1. Shut down Lotus Notes.
2. Start the current `setup.exe` of the installation program for the OpenScape Extensions for Lotus Notes.
3. Click on the **Next** button in the setup's welcome dialog.

Up comes this dialog:

4. Click on the **Upgrade** button in this dialog.

   The confirmation dialog for the upgrade installation opens.

5. Click on the **Upgrade** button in this dialog.

   The setup process starts and a new dialog opens that allows tracing the setup process. Another dialog opens, which marks the end of the installation.

6. Click on the **Finish** button in this dialog.

The update installation is complete and the setup assistant is closed.

8.5.3 Uninstalling the OpenScape Extensions for Lotus Notes

Uninstalling the OpenScape Extensions for Lotus Notes.

How to remove the application OpenScape Extensions for Lotus Notes from your local system:

Step by Step

1. Close the Lotus Notes client.
2. Start the current `setup.exe` of the installation program for the OpenScape Extensions for Lotus Notes.
3. Click on the **Next** button in the setup's welcome dialog.

Up comes this dialog:

4. Click on the **Remove** button in this dialog.

   The confirmation dialog for removing the application opens.

5. Click on the **Remove** button in this confirmation dialog.

   The uninstallation process starts and a new dialog opens which allows you to observe the uninstallation process. Another dialog opens, which marks the end of the uninstallation.

6. Click on the **Finish** button in this dialog.

The uninstallation is complete and the setup assistant is closed.

8.6 Configuring the OpenScape Extensions for Lotus Notes

Configuration options for the OpenScape Extensions for Lotus Notes.

You can perform/change the settings for OpenScape Extensions for Lotus Notes in configuration dialogs.

NOTICE: If invoking the configuration pages merely displays the **Network** tab, the OpenScape server could not be connected yet. In this case, try to connect the OpenScape server by specifying the user data, the network address and the port of the OpenScape server.

The following tabs are available for configuring the OpenScape Extensions for Lotus Notes:

- **Network**
  Use this dialog to perform the settings for the user access and the connection to the OpenScape server.
- **Audio / Video conference**
  Use this dialog to perform the settings for voice and video conferences.

- **Web Conference**
  Use this dialog to perform the settings for web conferences.
- **Presence Status**
  Use this dialog to perform the settings for copying the conference appointments in order to control the presence status.
- **User Interface**
  Use this dialog to define if the default configuration data should be used to create the conference or if you want to set the configuration data for each conference separately.

You reach the configuration dialogs in Lotus Notes via the calendar dialog menu bar. In there, click on the **Configuration** button to open the configuration dialogs.

NOTICE: Alternatively, you can reach the configuration dialogs via the **OpenScape** OpenScape button when you are already in the **New Calendar Entry** dialog. In the **OpenScape** menu, select **Configuration**.

Click the **OK** button to save the settings in the configuration dialogs and to close the settings dialog.

Click the **Cancel** button to discard your settings. The **OpenScape Configuration** settings dialog is closed.

NOTICE: Configuration modifications require a *Lotus Notes* restart to take effect.

8.6.1 Configuring the Network

The configuration settings for connecting the OpenScape server.

In the **Network** dialog, you can modify the initial setting data for your user access and the connection to the OpenScape server or enter this data if you have not performed this settings in the **Initial Configuration** dialog yet.

You reach the configuration dialogs in *Lotus Notes* via the calendar dialog menu bar. Push the **Configuration** button to open the configuration dialogs.

NOTICE: Alternatively, you can reach the configuration dialogs via the **OpenScape** OpenScape button when you are already in the **New Calendar Entry** dialog. In the **OpenScape** menu, select **Configuration**.

In the configuration dialog, switch to the **Network** tab.

In the **OpenScape Server - Network access** section you need to make the following entries for logging on to your OpenScape user account:

- **OpenScape User ID**
  Specify your user ID in the format *<user-ID@domain>*.
- **OpenScape Password**
  Enter the password you use to log on to the OpenScape server.

In the **OpenScape Server - Network configuration** section, the following entries are required for connecting the OpenScape server from your workstation:

- **OpenScape Server - Host Address**
  Enter here the complete network address (URL) of the OpenScape server.
- **OpenScape Server - Port**
  Enter here the port via which the connection to the OpenScape server is configured.

NOTICE: If you do not know the Logon or connection data, please contact your system administrator.

8.6.2 Audio / Video Conference Configuration

Configuration of the audio / video conference default settings.

In the **Audio /Video Conference** dialog you can perform default settings for your audio conferences and schedule a video conference.

You reach the configuration dialogs in Lotus Notes via the calendar dialog menu bar. Push the **Configuration** button to open the configuration dialogs.

NOTICE: Alternatively, you can reach the configuration dialogs via the **OpenScape** OpenScape button when you are already in the **New Calendar Entry** dialog. In the **OpenScape** menu, select **Configuration**.

In the configuration dialog, switch to the **Audio / Video conference** tab.

The **Audio conference** section provides the following configuration options:

- **Record name**
  If you select this option, each conference participant is requested to specify his/her name before joining the conference. Only after recording their name, they can join the conference.
- **Moderated conference**
  Use this option to determine whether to configure moderated or open conferences as default.

  NOTICE: Only the moderator can start and control moderated conferences.

- **Call direction**
  Select the corresponding option to define whether the conference participants are called by the system or have to dial into the conference by themselves .

– If you have configured that the conference participants will be called by the system, the conference will start automatically when the start time is reached. Then, all conference participants are called by the system. At the same time, the web conference, if configured, will also start.

NOTICE: The web conference start must be confirmed by the moderator or the conference creator.

– If you have configured that the conference participants need to dial into the conference by themselves, the conference is started when the first conference participant has dialed in via the bridge number and the conference PIN. As long as this conference participant is the only one, he/she hears music-on-hold. When the next conference participant joins the conference, the conference will be opened.

NOTICE: After you have dialed in or received the conference call, the system prompts you to join the conference. Click on 1 to join the conference or on abc 2 to reject to take part in the conference.

In the **Video conference** section, you can activate the checkbox **Add video conference** to configure the audio conference so that your conferences are always prepared for a video conference.

8.6.3 Configuring Web Conferences

Configuration of the web conference default settings.

You can default set your web conferences in the **Web Conference** dialog.

You reach the configuration dialogs in Lotus Notes via the calendar dialog menu bar. Push the **Configuration** button there to open the configuration dialogs.

NOTICE: Alternatively, you can reach the configuration dialogs via the **OpenScape** OpenScape button when you are already in the **New Calendar Entry** dialog. In the **OpenScape** menu, select **Configuration**.

In the configuration dialog, switch to the **Web conference** tab.

The top section under **Web conference provider access data** shows the properties of the web conference connections used. Additional tabs indicate that several web conference providers are available. Each tab represents one web conference provider.

In the bottom section under **Web conference default settings** you can use the **Add web conference** option to set that a web conference is automatically created with each conference you configure. The **Preferred web conference provider** combo box serves for selecting the desired web conference provider if several are available.

8.6.4 Configuring the Presence Status

Configuring the presence synchronization.

Use the **Presence** dialog to perform the settings that update your presence state on the OpenScape server.

You reach the configuration dialogs in *Lotus Notes* via the calendar dialog menu bar. Push the **Configuration** button to open the configuration dialogs.

NOTICE: Alternatively, you can reach the configuration dialogs via the **OpenScape** OpenScape button when you are already in the **New Calendar Entry** dialog. In the **OpenScape** menu, select **Configuration**.

In the configuration dialog, switch to the **Presence** tab.

The **Presence configuration** section provides the following configuration options:

- **Use presence synchronisation**
  When you select this option, the OpenScape presence status is automatically synchronized with your calendar data and your presence setting from the Lotus Notes client. In your Lotus Notes client, you can choose between the following presence settings:
  - **Free**
    Select this presence status if during the appointment or the meeting, the presence status shall be set to **Present**.
  - **Tentative**
    Select this presence status if during the appointment or the meeting, the presence status set before shall be kept.
  - **Busy**
    Select this presence status if during the appointment or the meeting, the presence status shall be set to **Busy**.
  - **Out of office**
    Select this presence status if during the appointment or the meeting, the presence status shall be set to **Out of office**.

  You reach the presence settings by pushing the **OpenScape** OpenScape button, which you find in the **New Calendar Entry** dialog. In there, select the **Presence status** menu option for defining the presence settings for an appointment or a meeting.
  The presence status synchronization triggers the following operational behavior:
  - Independently of the presence status set before, your presence status changes automatically to the "In Meeting" status when an appointment begins. This setting will be kept for the duration of the appointment or meeting.

  - If a Lotus Notes user answers a meeting request with "Tentative", his/her presence state set before will be kept.
  - At the end of the appointment or the meeting, the status "In Meeting" will change back to the status set before.
  - If a user changes his/her status during an appointment or a meeting, e. g. by using another client application, the status is not synchronized. This presence status set manually will then apply to this user and be displayed.
- **Update time in seconds**
  Click in the field in order to change the default time (60 seconds). Enter a new value for the synchronization time. Recommended values are 60 (1 minute), 600 (10 minutes), 900 (15 minutes) or 1800 (30 minutes) in order to achieve an ideal synchronization depending on the concentration of appointments.

8.6.5 Configuring the User Interface

Configuring the user interface.

Use the **User interface** dialog to perform the settings for the conference user interface.

You reach the configuration dialogs in *Lotus Notes* via the calendar dialog menu bar. Push the **Configuration** button to open the configuration dialogs.

NOTICE: Alternatively, you can reach the configuration dialogs via the **OpenScape** OpenScape button when you are already in the **New Calendar Entry** dialog. In the **OpenScape** menu, select **Configuration**.

In the configuration dialog, switch to the **User Interface** tab.

The **Conference user interface** section provides the following operating options:

- **Use default conferencing options**
  Select this option to skip the settings dialog which is normally opened for the individual configuration of your conferences when you push the **Add OpenScape conference** button. That means that all conferences to be created are configured with the default settings that you defined before on the configuration pages.

  NOTICE: You cannot change the configuration settings of an added conference retrospectively.

The **Invitation text** section provides the following configuration option:

- **Language**
  In the Language combo box, select the language in which the invitation text will be sent to the conference participants via the meeting request. From the available languages, select the one you need as default setting for your conference invitations. By default, the invitation text first uses the language in which your Lotus Notes client has been installed.

8.7 Configuring, Editing and Controlling Conferences

Operating options for the OpenScape Extensions for Lotus Notes.

After you have installed the OpenScape Extensions for Lotus Notes you can use the following operating options:

- Configuring conferences.
  You can schedule meet-me conferences via the calendar of your Lotus Notes client. Depending on the system environment, you can choose between the following conference types:
  - Audio conferences
  - Web conferences
  - Video conferences
- Editing conferences.
  This comprises:
  - Changing conference data before sending the conference invitation.
  - Changing conference data after sending the conference invitation.
  - Starting audio conferences.
  - Starting web conferences.
- Controlling conferences.
  You can control an active audio conference via:
  - The keypad of your telephone
  - The call control of your OpenScape Desktop Client Enterprise Web Embedded Edition or your OpenScape Web Client.
- Deleting conferences.
  You can delete your configured conferences from your Lotus Notes calendar anytime.

NOTICE: When deleting conferences, verify that no "orphaned" conferences remain. "Orphaned" conferences are conferences to which no appointments are assigned anymore after they have been deleted from the Lotus Notes calendar. How to delete conferences correctly describes section *Deleting Conferences*.

8.7.1 How to Configure a Conference

Configuring a conference via the Lotus Notes calendar.

How to configure a conference:

Step by Step

1. Start your Lotus Notes client.
2. Open your Lotus Notes mailbox.
3. Click on the **Mail** button.
4. In the menu, select **Switch to calendar**.

The calendar dialog opens.

5. Click on the **Schedule a meeting** button.

The **New Calendar Entry for...** dialog box opens.

6. Specify a meeting **subject** in the corresponding input line.

> ***NOTICE:*** The subject describes the conference. Under this description the conference will be logged in the message respectively conference journal.

7. Use the **Starts** and **Ends** combo boxes to schedule the conference.
8. If required, select a deviating time zone via the **Specify a different time zone** option.
9. If required, configure if you would like to create a recurrent conference. To this, select the **Repeats** option. The **Repeat Options** dialog opens. Enter the corresponding data for the repetition frequency.

10. In the **Invitees** input line, enter all conference participants.

> ***NOTICE:*** Via the button to the right of the input line, you can browse the Lotus Notes address books or your contact lists for participants and select them there.

11. Click on the **AddOpenScape Conference** button:

Depending on your configuration settings the **OpenScape Conference** dialog opens, or the conference data are immediately displayed in the bottom section of the dialog.

> ***NOTICE:*** This dialog opens during the creation of a conference only if you have not selected the **Use default conference options** option while performing configurations on the **User Interface** tab.

12. Select the following options in the **Audio Conference** section:

- **Record name**

  Leave this option activated if you wish to have the names of the conference participants recorded, or deactivate it otherwise.

> ***NOTICE:*** If this checkbox is active, the conference participants need to specify their names before they can take part in the conference.

- **Moderated conference/open conference**

  Leave this checkbox activated if you wish to have a moderated conference. Deactivate this option if you wish to have an open conference.

  A moderated conference requires the presence of a moderator. As long as the moderator is not in the conference, the other conference participants hear music-on-hold until the moderator join the conference.

  The moderator of a moderated conference has more options to control the conference than the other participants of the moderated conference.

  In case of an open conference the conference starts as soon as the first conference participant is in the conference. The conference now takes place with the participants who successively dial in.

  In an open conference, all conference participants have the same options to control the conference.

- **Call direction**

  Select the corresponding option to define whether the conference participants are called by the system or have to dial into the conference by themselves .

13. Select the following options in the **Web Conference** section:

- **Add web conference**

  Set this radio button if you want to create a web conference and an audio conference simultaneously.

- **Preferred web conference provider**

  If several providers are available, you can select the conference provider from this combo box.

14. In the **Invitation text** section, select via the **Language** combo box the language for the invitation text. In this language, the invitation text will be sent to all conference participants via the meeting request.

15. In the **Video conference** section, select whether you would like to configure additionally a video conference.

The invitation text contains the additional information "** This conference supports video.*".

16. Click on **OK** after having made your selection.

The dialog is closed and the conference data is displayed in the bottom section of the dialog.

The conference access data are in detail:

In the **Voice** section:

The bridge number(s) the conference participants require to log on to the conference and the conference PIN that the conference participants use to authenticate themselves.

In the **WEB** section:

Two links for opening the required web conference client:

You can use the first link for downloading a separate stand-alone client for the web conferencing session.

The second link enables loading a web-based client for the web conference.

17. In the dialog, push the **Save and Send Invitations** button.

The meeting request is sent do the addressed system users and the **New Calendar Entry** dialog is closed. All required information such as conference access data, meeting time and subject is delivered to the selected participants and entered in their Lotus Notes calendar as appointment.

When the conference is created, the conference is entered with its data in the conference list of each OpenScape conference participant in all OpenScape clients at the same time.

NOTICE: Bear in mind that you must communicate the conference information to external conference participants (participants without OpenScape user account) via a separate e-mail or other means of communication.

8.7.2 Editing the Conference before Sending the Conference Data

Editing a configured conference before sending the meeting request.

You have configured a conference by selecting the relevant participants, the subject and the conference time and by clicking on the **Add OpenScape Conference** button.

After you have carried out these actions, the **New Calendar Entry** dialog displays the two buttons for editing the conference:

- **Delete OpenScape Conference**
  Deletes the configured conference from your own conference list and from the conference lists of the invited participants.

- **Join conference**
  Using this option you can join the conference.

  NOTICE: If a web conference has been configured additionally, the **Start Web Conference** button will be activated after the OpenScape conference has started. Push this button to start the web conference from the Outlook calendar dialog.

8.7.3 Editing the Conference after Sending the Conference Data

Editing a configured conference after sending the meeting request.

After you have sent the conference data, the conference date is entered in your Lotus Notes calendar. You can reopen the conference data for editing by opening in Lotus Notes the calendar and doubleclicking the conference calendar-entry.

The two buttons for editing the conference are now available:

- **Delete OpenScape Conference**
  Deletes the configured conference from your own conference list and from the conference lists of the invited participants.

  NOTICE: The sent conference notifications are not deleted.

- **Join conference**
  Using this option you can join the conference.

  NOTICE: If a web conference has been configured additionally, the **Start Web Conference** button will be activated after the OpenScape conference has started. Push this button to start the web conference from the Outlook calendar dialog.

8.7.4 Deleting Conferences

Deleting conferences created via OpenScape Extensions for Lotus Notes.

To delete conferences, you must take one of the actions proposed below to avoid that "orphaned" conferences are displayed in the OpenScape Desktop Client Enterprise Web Embedded Edition or the OpenScape Web Client conference lists. "Orphaned" conferences are conferences to which no appointments are assigned any more after being deleted from the *Lotus Notes* calendar.

"Orphaned" conferences in the OpenScape Desktop Client Enterprise Web Embedded Edition or the OpenScape Web Client may result, for example, from the following delete actions:

- Deleting a conference entry from the Lotus Notes calendar main view.

- Deleting the conference entry via the calendar access of your mobile device.

To delete the conference created via the OpenScape Extensions for Lotus Notes without leaving "orphaned" conference entries in the OpenScape Desktop Client Enterprise Web Embedded Edition or the OpenScape Web Client, you must first open the corresponding conference entry with a doubleclick. After this, you have two options to delete the conference entry successfully:

- You can delete the conference via the opened conference entry by pushing the **DeleteOpenScape Conference** button.

- Deleting the conference via the opened conference entry using the deletion functions in *Lotus Notes (menu* **Tools/Actions** > **Delete/Cancel**).

8.7.5 Starting the Audio Conference

Start-up behavior of the audio conference.

An audio conference starts in most cases automatically when the start time has been reached (scheduled conferencing). However, in case of a moderated conference the moderator can start it manually beforehand. If the audio conference is an open one, it can also be started manually or by any conference participant dialing in. Depending on your conference configuration, the server triggers the following functions at the conference start:

- **The system calls all conference participants.**
- **All conference participants need to dial into the conference by themselves.**

The conference participants are called by the system

If you have configured that the conference participants will be called by the system, the conference will start automatically when the start time is reached. Then, all conference participants are called by the system. If the moderator has started the conference beforehand, all conference participants are called at this time.

The conference participants dial into the conference by themselves

If you have configured that the conference participants need to dial into the conference by themselves, the conference starts automatically when the start time is reached. The conference participants can then dial into the conference. If another conference participant has started the conference beforehand (manually or by dialing in), he/she hears music-on-hold as long as he/she is the only participant. When the next conference participant joins the conference, the conference will be opened.

NOTICE: After you have dialed in or received the conference call, the system prompts you to join the conference. Click on 1 to join the conference or on abc 2 to refuse taking part in the conference.

8.7.6 How to Dial into an Audio Conference

Joining an audio conference.

How to dial into the conference:

Step by Step

1. Open the meeting entry of the relevant conference in the *Lotus Notes* calendar.
2. Dial into the conference under the **Bridge Number** specified here when the conference start is due.
3. Enter the **Conference PIN** via telephone when the system prompts you to do so. This identifies you as authorized conference participant.

You have now joined the conference.

8.7.6.1 Controlling a Conference via the Call Control

Controlling a conference via the "Call Control" function dialog.

The following features are available in the **Call Control** function window for controlling an active conference:

In the header

- **Lock conference**
  This feature is only available for participants with moderator or creator privileges. This option blocks the conference for other subscribers who want to join in. After you have clicked on the icon it changes to .
- **Unlock conference**
  Releases the conference locking. After you have clicked on the icon it changes to .
- **Mute conference**
  This feature is only available for participants with moderator or creator privileges. It interrupts the sound transmission to all conference participants. After you have clicked on the icon it changes to .
- **Unmute conference**
  This feature is only available for participants with moderator or creator privileges. It cancels the conference muting.
- **End conference**
  This feature is only available for participants with moderator or creator privileges. It ends the conference by closing down the connections to the other conference participants.
- **Start 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.

During the connection representation of the conference participants

> ***NOTICE:*** The connection representation shows all participants who are currently in the conference. In a moderated conference, the moderator is indicated by a dot that precedes his/her name entry. The name of the conference participant who is currently active (thus talking) is highlighted in boldface.

- **Handover and continue active connection**
  This feature allows every conference participant to hand his/her conference connection over to another device and continue taking part in the conference from there.
- **Mute participant**
  It interrupts the sound transmission for a conference participant. After you have clicked on the icon it changes to .
- **Unmute 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 conference
    Enables every participant to leave the active conference. As soon as every participant has left the ad-hoc conference, the conference ends.

> ***NOTICE:*** After 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.

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.

8.7.6.2 Controlling a Conference via Telephone

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. The default setting for having the menu functions put out by announcement is * * . In case of doubt please contact your administrator.

Activating the Control Menu

You control a conference by entering two key commands on the keypad of your phone. This prevents conference disruptions by a telephone key being pushed inadvertently.

NOTICE: The administrator can change the telephone key/ command assignment. The following description refers to the system default setting.

Control Commands

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

- * * **Play menu**
  The available menu options are announced to you.
- * 2 **Lock/unlock conference.**
  This feature is only available for participants with moderator or creator privileges. Once the conference has been locked, no further participants may dial in. Pushing this key once more undoes the restriction.
- * 3 **Activate/lift muting.**
  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 **Activate/lift conference muting.**
  This feature is only available for participants with moderator or creator privileges. 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 # pound key. For further proceedings, please follow the voice prompts.
- * 9 **Turn off 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.

8.7.7 Starting a Video Conference Connection

How to set up a video conference connection.

With the corresponding requirements met, you can extend an audio conference to a video conference. Requirements are e.g. server licenses and video-compatible devices or clients.

When you select the **Add Video Conference** option upon configuring the conference, the video dialog opens automatically at the conference start. The user only needs to release sending his/her own video image for starting the video streaming. When the conversational partners release their video streaming, too, all conference participants can see each other.

The bottom left area of the video screens displays the participant name respectively participant number. In case of a moderated conference, the video screen features the moderator icon , which precedes the moderator's text entry.

The video screen of the currently active speaker is highlighted by a colored frame. In addition, the participant name or number of the active speaker appears in boldface.

NOTICE: Users who take part in the conference via a pure voice connection see a text field in the video dialog when they are currently active as speaker. This text field displays the participant name or number of this user.

8.7.8 Starting/Joining a Web Conference

Starting a web conference.

If you have configured an additional web conference, there are two ways of starting such a conference depending on how the call behavior after the conference start is configured:

- **The conference participants are called by the system.**
- **The conference participants need to dial into the conference by themselves.**

The conference participants are called by the system

If you have configured that the conference participants will be called by the system, the web conference will start automatically when the conference starts. The moderator or conference creator only has to confirm the web conference start in a popup window. The web conference participants can then join the web conference.

The conference participants need to dial in by themselves

If you have configured that the conference participants need to dial into the conference by themselves, the web conference must be started manually. This can be done in two ways:

- Via *Lotus Notes:*
  - Push the **Start Web Conference** icon if you are the moderator of the conference or the person who created the conference. This starts the web conference.
- Via the OpenScape Web Client or OpenScape Desktop Client Enterprise Web Embedded Edition:
  - In the call control already open for the active audio conference, click on the **Start Web Conference** icon if you are the moderator of the conference or the person who created the conference. This starts the web conference.

NOTICE: Operating the web conference client is described in the *OpenScape Web Collaboration V1* manual.

Joining a web conference

How to join the web conference after it has been started:

- Via *Lotus Notes:*
  - Click on one of the two links for using either the separate stand-alone client or the web-based one.
    Open the meeting entry of the relevant conference in the Lotus Notes calendar and click on the corresponding link. The web conference client starts.
- Via the OpenScape Web Client or OpenScape Desktop Client Enterprise Web Embedded Edition:
  - In the call control already open for the active audio conference click on the **Start Web Conference** icon. This downloads the web conference client for the web conference.

9 OpenScape Desktop Integration

General Description of the OpenScape Desktop Integration

Using the information on the **DesktopIntegration** tab from the **General Settings** menu of the OpenScape Web Client you can install a small program on your workstation that allows calling a subscriber from any application.

An example: A 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 Integrationapplication even if the OpenScape Web Client screen is closed.

In the OpenScape Desktop Integration application you can set further options for the startup behavior, the OpenScape Web Client display and the notification options.

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

9.1 Application Requirements

Application requirements for the OpenScape Desktop Integration.

Please note 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
  - For https:// -> Port 8443 TCP

Please heed the following requirements for the TSP extension, which you can install via the context menu of the OpenScape DesktopIntegration under Settings > Options:

- The TSP of the OpenScape DesktopIntegration is a pure 32-bit application. In case of an installation on a 64-bit operating system this extension will not work.

- You need administrator privileges for setting up the TSP on Windows Vista and Windows 7.

> ***NOTICE:*** TSP support enables direct calling from selected e-mails or address book entries in Microsoft Outlook. The associated contacts need to have been assigned a phone number for this purpose.

9.2 How to Install the OpenScape Desktop Integration

Installing the OpenScape Desktop Integration.

The following steps are required for using the OpenScape Desktop Integration:

Step by Step

1. Start the OpenScape Web Client.
2. Open the **DesktopIntegration** tab. You reach this settings dialog via **menu** -> **General** -> **Common** -> **DesktopIntegration** tab.

3. If a 64-bit operating system is installed at your workstation, click the **Download** or **Download (x64)** button on the **DesktopIntegration** tab.

   The file-download dialog opens.

4. Enable here the **Save** button.

   The file-selection dialog for storing files opens.

5. Save the `OSCwebDI.exe` file on the desktop or in any directory.
6. Using the Explorer, open the desktop or the directory in which you have saved the application. Doubleclick `OSCwebDI.exe`.

   The application starts.

   After the start the task bar features the icon.
7. Rightclick the icon in the task bar to invoke the features of this application and the setting pages for the OpenScape Desktop Integration.

9.3 Configuring the OpenScape Desktop Integration

Configuring the OpenScape Desktop Integration.

You use the context menu function **Settings** to open the settings dialog for configuring the program OpenScape Desktop Integration.

The following settings dialogs are available for this purpose:

- **Hotkey**

On the **Hotkey** tab you determine the key command that triggers the feature of calling the phone number saved to the clipboard.
Click in the entry field and enable the desired *<F-key>* or *<Ctrl + F-key>*. The function key that triggers the dial process is displayed in the input field.

NOTICE: To delete the function key, click in the input field and enable the **Backspace** key.

- **Start**

On the **Startup** tab you define the startup behavior of the OpenScape Desktop Integration program. The following startup options are available individually or in combination:

  – **Open window at startup**
  Selecting this option you determine that the OpenScape Web Client automatically starts when the OpenScape Desktop Integration program is booted.

  – **Starting this application at login**
  Select this option to define that the OpenScape Desktop Integration program is started when you log on to your operating system.

  – **Add entry to start menu**
  You select this option to determine that an entry is created in the start menu of your user account when the application starts. Subsequently, the application is started automatically each time you log on to the system.

- **Appearance**

On the **Appearance** tab you determine the representation mode for the OpenScape Web Client window. The following options are available:

- **Keep windows always on top**
  When you select this option, the OpenScape Web Client window will always appear as the topmost application.
- **Dialogs of the main window stay on top of it**
  This setting determines whether newly opened dialog windows can be covered by the main window.
- **Open window for dialing**
  This setting opens the user interface (OpenScape Web Client and/or OpenScape Desktop Client Enterprise Web Embedded Edition), if a number is dialed via the hotkey function.
- **Compact view**
  This setting opens the compact view of the user interface with the call control if a number is dialed via the hotkey feature.
- Positioning the OpenScape Web Client on the screen:
  Open window at screen top.
  Open window at screen bottom.
  Open window at screen left.
  Open window at screen right.

• **Options**

On the **Options** tab you can perform the following settings:

- **Enable notifications**
  Via this checkbox you can deactivate the notifications that are always active by default.
  The following notifications are active by default:
  Enable notification on incoming call
  When a call comes in, you are informed by a flash on the desktop.
  Enable notification on new instant message
  When an instant message comes in, you are informed by a flash on the desktop.

– **Select this option to install/update TSP (Telephony Service Provider) for dialing from TAPI-Applications** . Using this application you can directly call a subscriber from *Microsoft Outlook* via journal entries. Select the corresponding journal entry and select from the Microsoft Outlook menu **Actions** > **Call contact**.

NOTICE: The journal entry must reference a phone number via the database for this purpose.

After clicking the TSP button you can update this service provider manually or install it when required.

– **Show presence information in the notification area**
After selecting this option your presence information will be displayed in the notification area. Then can then also directly change your presence status in the notification area.

– **Enable dialing from HTML pages**
Selecting this option releases the feature to dial a phone number from a specially prepared HTML page.
The phone number must have been integrated via an html command according to the following pattern:
`<a href="clicktodial:<phone number>"><htmldisplay></a>`
Example:
To integrate the phone number “123456789” via the “Sales” link in an HTML page, you need to enter the following command line in the source code in the position where the link is to appear:
`<a href="clicktodial:123456789">Sales</a>`
The "Sales" link is embedded in the HTML page for directly dialing the phone number "123456789".

- **Language**

Select one of the defaulted languages to set it for menus and info texts. The following languages are currently available: English, German, French, Spanish, Italian, Portuguese, Brazilian Portuguese, Chinese, Dutch, Turkish and Russian.

- **About**

On this tab you see the version number of the currently installed version of the OpenScape Desktop Integration program.

9.4 Operating the OpenScape Desktop Integration

Operating the OpenScape Desktop Integration.

The following features are available in the context menu for the OpenScape Desktop Integration:

- **Dial: *<abcxyz>***
  The feature enables dialing the digit string you have copied to the clipboard as phone number.
- **Open**
  Enables opening the OpenScape Web Clientin an individual browser window.
- **Disable hotkeys**
  A click on this icon disables the hotkey feature even if the application is started.
- **Exit**
  A click on this icon closes the **DesktopIntegration** program.
- **Options**
  Opens the settings dialog for configuring the OpenScape Desktop Integration program.

10 OpenScape Click-to-Dial-Browser-Plug-in

Calling with the OpenScape Click-to-Dial-Browser-Plug-in directly from HTML Pages.

The OpenScape Click-to-Dial-Browser-Plug-in is a program which allows to dial directly a phone number displayed on any HTML page by clicking this number in the web browser. Dialable phone numbers are highlighted on the HTML pages and displayed with the flag of the country corresponding to their country code.

The installation of the application can be accomplished in several ways:

- Via the OpenScape Web Client.
  The installation file stored on the server is downloaded and installed manually. You can find the download button in the OpenScape Web Client under **menu** > **General** > **Common** > **Browser Integration** tab.
- Via the OpenScape Desktop Client Enterprise Web Embedded Edition.
  During the OpenScape Desktop Client Enterprise Web Embedded Edition installation, the OpenScape Click-to-Dial-Browser-Plug-in is also installed automatically.

  NOTICE: If the OpenScape Click-to-Dial-Browser-Plug-in has been installed via the OpenScape Desktop Client Enterprise Web Embedded Edition, it is initially inactive by default. Before using this feature, the user has to activate the application first. See the *Configuration* paragraph of this chapter.

- Via the program OpenScape Client Integrations.
  This installation program allows you to use OpenScape Click-to-Dial-Browser-Plug-in without installing another CTI client like the OpenScape Desktop Client Enterprise Web Embedded Edition or the OpenScape Web Client. You find more detailed information on this installation program in chapter OpenScape Client Integrations of this manual.

10.1 OpenScape Click-to-Dial-Browser-Plug-in

OpenScape Click-to-Dial-Browser-Plug-in features.

Using the OpenScape Click-to-Dial-Browser-Plug-ins you can select a phone number contained on any HTML page and directly initiate a call to this number.

The following browsers support this function:

- Internet Explorer Integration
  Provides the call functionality in the Microsoft Internet Explorer.
- Mozilla Firefox Integration
  Enables calling by mouseclick via your Mozilla Firefox web browser.

10.2 Requirements for Using the OpenScape Click-to-Dial-Browser-Plug-in

Requirements for using the OpenScape Click-to-Dial-Browser-Plug-in.

Only specific operating systems and browser versions support this browser plug-in.

You find current and detailed information about the supported clients and their versions in the *OpenScape UC Application Planning Guide* manual.

10.3 Setting up the OpenScape Click-to-Dial-Browser-Plug-in

General information about setting up the OpenScape Click-to-Dial-Browser-Plug-in.

> ***NOTICE:*** This section contains information that exclusively apply for setting up the OpenScape Click-to-Dial-Browser-Plug-in via the OpenScape Web Client. If you wish to use the plug-in in combination with the OpenScape Desktop Client Enterprise Web Embedded Edition, it is included in the OpenScape Desktop Client Enterprise Web Embedded Edition setup.

The system administrator or any user who has administrative privileges on a computer can install the OpenScape Click-to-Dial-Browser-Plug-in. The OpenScape Click-to-Dial-Browser-Plug-in is then installed for all users who also deploy this computer.

> ***NOTICE:*** The OpenScape Click-to-Dial-Browser-Plug-in is automatically initialized and activated with the first invocation of the web browser.

The following three files are available for setting up the OpenScape Click-to-Dial-Browser-Plug-in:

- `BrowserIntegration.msi`
  Installs the OpenScape Click-to-Dial-Browser-Plug-in for the desired web browser - Internet Explorer or Mozilla Firefox.
- `InstallBrowserIntegration.exe`
  Executes the `BrowserIntegration.msi` file. The configuration paramters specified in the `config.ini` file are used in this process. Via this file you also change the setup, perform updates and start the OpenScape Click-to-Dial-Browser-Plug-in uninstallation.
- `config.ini`
  In this file you can enter the following configuration parameters that are transferred to the `BrowserIntegration.msi` setup file by executing the file `InstallBrowserIntegration.exe` during the installation.

- *`WebClientAddress`*
  This parameter defines the URL of the OpenScape Web Client and optionally the port used. For example:
  `http://10.1.2.130:8443`
  or
  `https://oswebclient.siemens-enterprise.com`
- *`CommandLine`*
  At this point you can enter command line parameters that influence the setup. For example, `/qn` indicates that the installation is to be performed automatically, i.e. without user entries and setup dialogs. This setup type requires the mandatory definition of the OpenScape Web Client system URL in the `config.ini` file. Both features, Internet Explorer Integration and Mozilla Firefox Integration, are installed and can be deployed by all users of the system.

NOTICE: The Firefox Integration feature is only installed when the Mozilla Firefox web browser is installed on the system.

NOTICE: Modify the `config.ini` file only by following your system administrator's instructions.

10.3.1 How to Perform the Default Setup

Default setup of the OpenScape Click-to-Dial-Browser-Plug-in.

IMPORTANT: Setting up OpenScape Desktop Client Enterprise Web Embedded Edition with OpenScape Click-to-Dial-Browser-Plug-in and the default installation described in the following are mutually exclusive. The default setup ends with a corresponding message, if the OpenScape Desktop Client Enterprise Web Embedded Edition has already been installed with integrated OpenScape Click-to-Dial-Browser-Plug-in on the system.

NOTICE: The setup dialogs are displayed in English.

To perform the setup, proceed as follows:

Step by Step

1. Close the web browser currently used (Internet Explorer or Mozilla Firefox).
2. Start the `InstallBrowserIntegration.exe` file.

The welcome dialog of the setup wizard opens.

3. Click on **Next** to initiate the setup process.

The following dialog appears:

4. Enter your and your organization's name. Then click on **Next**.

The dialog that follows lists the features to be installed.

5. Determine whether the Firefox Integration feature is to be installed as well.

NOTICE: The IE Integration is always installed by available.

NOTICE: The Firefox Integration feature is only available for selection if the Mozilla Firefox web browser is installed on the system.

Click on the icon to the left of the Firefox Integration feature to display the following menu:

– **Will be installed on local drive.**
  Select this option to install the Firefox Integration on the local computer.
– **Entire feature will be installed on local hard drive.**
  Select this option if both features are to be installed.

– **Entire feature will be unavailable.**
Select this option if you do not want the Firefox Integration feature be installed on the local computer.

6. Click on **Next >**.

The following dialog pops up:

7. Enter the OpenScape Web Client URL.

The specified URL is checked via the **Check server address** button.

The correct URL is confirmed with a success message.

Click on **OK** to close this message and to continue the setup process.

If the URL is incorrect, a message points to the invalidity of this URL.

Click on **OK**. The message window closes. You can now correct the URL and continue the setup process.

8. Then click on **Next**. The setup process starts. A new dialog opens which allows you to observe the setup process.

The following dialog informs you about the completion of the setup.

9. Click on the **Finish** button.

The setup wizard closes.

Setting up the OpenScape Click-to-Dial-Browser-Plug-in is now complete.

10.4 Changing the Setup, Updating and Uninstalling the OpenScape Click-to-Dial-Browser-Plug-in

Introductory description of how to perform a setup change, repair (update) or uninstall the OpenScape Click-to-Dial-Browser-Plug-in.

You start modifications to the existing setup, updates and the program's uninstallation via the following dialog. This dialog opens when you execute the setup file from the setup directory of the application. The name of the setup file is:

`InstallBrowserIntegration.exe`

You can customize the program as follows:

- Via **Modify**
  Installing/uninstalling a Firefox integration
- Via **Repair**
  Installing a more recent program version.
- Via **Remove**
  Uninstalling the program.

10.4.1 Modifying the Installation (Modify)

Options for adjusting the OpenScape Click-to-Dial-Browser-Plug-in setup.

After you have installed the OpenScape Click-to-Dial-Browser-Plug-in you can perform the following setup modifications:

- If you have not integrated Firefox yet, you can do it retrospectively.
- If you have integrated Firefox already, you can uninstall the Firefox support again.

10.4.1.1 How to Install the Firefox Support Retrospectively

Installing the Firefox integration for the OpenScape Click-to-Dial-Browser-Plug-in retrospectively.

If you wish to use the call functionality from your Firefox web browser after a default installation of the OpenScape Click-to-Dial-Browser-Plug-in, proceed as follows:

Step by Step

1. Make sure that Mozilla Firefox has terminated.
2. Start the file:

   `InstallBrowserIntegration.exe`
3. Select the **Modify** option in the opened dialog pictured above.
4. Click on **Next**.

   The dialog for selecting the feature to be installed appears.
5. Select the **Firefox Integration** feature and click on **Next**.

   The dialog for entering the OpenScape Web Client URL opens.
6. Click on **Next >**.

   The installation process begins.
7. Click on **Finish** when the setup is complete.

   The process ends and the setup wizard closes.

> ***NOTICE:*** After the Mozilla Firefox reboot you are informed about the newly installed plug-in (add-on) in a dialog. Click on **Refresh** to copy the changes and close this dialog.

Installing the Firefox integration for the OpenScape Click-to-Dial-Browser-Plug-in retrospectively is now accomplished.

10.4.1.2 How to Uninstall the Firefox Support

Uninstalling the Firefox integration for the OpenScape Click-to-Dial-Browser-Plug-in.

How to uninstall the Firefox Integration without removing the entire program:

Step by Step

1. Make sure that Mozilla Firefox has terminated.
2. Start the file:

   `InstallBrowserIntegration.exe`
3. Select the **Modify** option in the opened dialog pictured above.
4. Click on **Next**.

The dialog for selecting the feature to be installed appears.

5. Click on to the left of the **Firefox Integration** feature.
6. Select the **Entire feature will be unavailable** option.
7. Click on **Next** in this dialog.

   The uninstallation routine starts. A new dialog opens which allows you to observe the uninstallation process.
8. When the uninstallation is complete, a new dialog opens that you can close via the **Finish** button.

Calling from the web browser Mozilla Firefox is not possible anymore.

10.4.2 Update Installation (Repair)

Update installation (repair) for the OpenScape Click-to-Dial-Browser-Plug-in.

The Repair function is used for the following actions:

- If a more recent version of the OpenScape Click-to-Dial-Browser-Plug-in is to be installed after the setup.
- If the OpenScape server URL needs to be adjusted after the setup.
- If a malfunction has occurred in the currently installed application.

10.4.2.1 How to Perform an Update Installation (Repair)

Performing an update installation (repair) for the OpenScape Click-to-Dial-Browser-Plug-in.

If an update installation is required, proceed as follows:

Step by Step

1. Shut down the web browser currently used.
2. Start the current version of the setup program for the OpenScape Browser Integration.

   `InstallBrowserIntegration.exe`
3. Select the **Repair** option in the opened dialog pictured above.
4. Click on **Next**.

The following dialog opens.

5. Enter the OpenScape Web Client URL.
6. Click on the **Check server address** button.

   This checks the entered URL.

   If the URL is correct, the Internet Explorer displays the login mask of the.
7. Click on **Next**.

   A new dialog opens that allows tracing the setup process:
8. Another dialog opens, which marks the end of the installation. Click on the **Finish** button in this dialog.

The update is now complete and the setup assistant closed.

10.4.3 Uninstalling the OpenScape Click-to-Dial-Browser-Plug-in

Uninstalling the OpenScape Click-to-Dial-Browser-Plug-in.

NOTICE: For a system on which several users deploy the OpenScape Click-to-Dial-Browser-Plug-in in the Microsoft Internet Explorer please note that the function **WebClient Call** must be manually removed for these users during the OpenScape Click-to-Dial-Browser-Plug-in uninstallation. Open the **Search Options** menu in the Microsoft Internet Explorer and select **Manage Search Providers**. Select the **WebClient Call** feature in the displayed list. Finally, click on the **Remove** button.

You can use the following options to remove the OpenScape Click-to-Dial-Browser-Plug-in application from your local system:

- Uninstallation via executing the `InstallBrowserIntegration.exe` file
- Uninstallation via the Windows **Start** menu

10.4.3.1 How to Perform the Uninstallation via the Setup File

Uninstalling the OpenScape Click-to-Dial-Browser-Plug-in via the setup file.

To uninstall the OpenScape Click-to-Dial-Browser-Plug-in via executing the `InstallBrowserIntegration.exe` file, proceed as follows:

Step by Step

1. Shut down the web browser currently used.
2. Start the current version of the setup program for the OpenScape Browser Integration.

   `InstallBrowserIntegration.exe`

   The following dialog opens:

3. Select the **Remove** option in the opened dialog pictured above.
4. Click on **Next**.

   A confirmation dialog opens.
5. Click on **Next** in this dialog.

   The uninstallation process begins. A new dialog opens that allows tracing the uninstallation process:
6. Another dialog opens, which marks the end of the uninstallation. Click on the **Finish** button in this dialog.

The OpenScape Click-to-Dial-Browser-Plug-in is thus uninstalled and the uninstallation wizard closes.

10.4.3.2 How to Perform the Uninstallation via the Windows Control Panel

Uninstalling the OpenScape Click-to-Dial-Browser-Plug-in via the Windows control panel.

To uninstall the OpenScape Click-to-Dial-Browser-Plug-in via the control panel, proceed as follows:

Step by Step

1. Shut down the web browser currently used.
2. Click on **start** and select the **Control Panel** > **Add or Remove Programs** option.
3. Select the **Siemens OpenScape Browser Integration** entry in the displayed list.
4. Then click on the **Remove** button.
5. Click on **Yes** in the open confirmation dialog.

   The uninstallation starts.

The OpenScape Click-to-Dial-Browser-Plug-in is thus uninstalled.

10.5 Configuring the OpenScape Click-to-Dial-Browser-Plug-in

Configuring the OpenScape Click-to-Dial-Browser-Plug-in.

You can perform or change the OpenScape Click-to-Dial-Browser-Plug-in settings via the configuration menu.

After the program's installation you reach the configuration menu or configuration dialog depending on the web browser via different operation steps.

10.5.1 How to Configure the OpenScape Click-to-Dial-Browser-Plug-in for the Internet Explorer

Configuring the OpenScape Click-to-Dial-Browser-Plug-in for the Internet Explorer

To configure the OpenScape Click-to-Dial-Browser-Plug-in for the Internet Explorer, proceed as follows:

Step by Step

1. Start the Internet Explorer as usual.
2. Click on in the toolbar.

The configuration dialog opens.

NOTICE: If OpenScape Desktop Client Enterprise Web Embedded Edition is installed on your computer, integration of the OpenScape Click-to-Dial-Browser-Plug-in in the Internet Explorer is configured for this application. This means that the desired connections are set up via the currently installed client. For example, the OpenScape Desktop Client Enterprise Web Embedded Edition is pre-installed on the system in the depicted dialog. If the OpenScape Desktop Client Enterprise Web Embedded Edition is started at the time of the call, it is used for the connection setup. If this software solution is not installed on the system, the call is initiated via the OpenScape Web Client.

10.5.2 Configuring the OpenScape Click-to-Dial-Browser-Plug-in for Mozilla Firefox

Configuring the OpenScape Click-to-Dial-Browser-Plug-in for Mozilla Firefox.

You can open the configuration menu of the OpenScape Click-to-Dial-Browser-Plug-in for Mozilla Firefox in two different ways:

- Open the **Tools** menu and select the **Config Menu** option.
- Rightclick anywhere in the menu bar.

10.5.2.1 How to Configure the OpenScape Click-to-Dial-Browser-Plug-in for Firefox via the Tools Menu

Configuring the OpenScape Click-to-Dial-Browser-Plug-in for Firefox via the **Tools** menu

To configure the OpenScape Click-to-Dial-Browser-Plug-in for Firefox, proceed as follows:

Step by Step

1. Start Mozilla Firefox as usual.
2. Click on **Tools** in the main bar.
3. Select the **Start Config Menu** function.

   The configuration dialog appears.

> ***NOTICE:*** If OpenScape Desktop Client Enterprise Web Embedded Edition is installed on your computer, integration of the OpenScape Desktop Client Enterprise Web Embedded Edition in Firefox is configured for this application. This means that the desired connections are set up via the currently installed client. If the OpenScape Desktop Client Enterprise Web Embedded Edition is started at the time of the call, it is used for the connection setup. If this software solution is not installed on the system, the call is initiated via the OpenScape Web Client.

10.5.2.2 How to Configure the OpenScape Click-to-Dial-Browser-Plug-in for Firefox via Rightclick on the Menu Bar

Configuring the OpenScape Click-to-Dial-Browser-Plug-in for Firefox with a right-click on the menu bar.

To configure the OpenScape Click-to-Dial-Browser-Plug-in for Firefox, proceed as follows:

Step by Step

1. Start Mozilla Firefox as usual.
2. Rightclick anywhere in the menu bar.
3. Select **Customize...** in the open context menu.

   The **Customize Toolbar** dialog opens.
4. Click on the **Config Menu** entry in the displayed icon list.

5. Keep the left mousebutton pressed and drag the icon to the desired position in the toolbar.
6. Click on the **Finish** button.

   The dialog closes.
7. Click the button.

   The configuration dialog opens.

10.5.3 Configuration Options for the OpenScape Click-to-Dial-Browser-Plug-in

Configuration options for the OpenScape Click-to-Dial-Browser-Plug-in.

NOTICE: The configuration dialogs for the OpenScape Click-to-Dial-Browser-Plug-in contain the same options for the Internet Explorer and Mozilla Firefox integration.

NOTICE: You specify the language of the configuration dialog under **Control Panel** > **Regional and Language Options**.

The following configuration options are available for setting the OpenScape Click-to-Dial-Browser-Plug-in:

- Activating/deactivating the IE/Firefox integration
- Defining blacklists of words
- Defining blacklists of URLs
- Defining a blacklist of phone numbers
- Selecting countries

10.5.3.1 Activating/Deactivating the IE/Firefox Integration

Activating/deactivating the configuration option IE/Firefox integration

The Internet Explorer/Firefox integration becomes active after you have installed the OpenScape Click-to-Dial-Browser-Plug-in. You can deactivate the integration using the **Disable IE Integration** or **Disable Firefox Integration** buttons.

Deactivation means that phone numbers are no longer displayed as links but as normal text and cannot be used for dialing anymore.

10.5.3.2 Defining Blacklists of Words

Configuration option defining "blacklists of words".

> ***NOTICE:*** This list does not contain any entries after the installation.

In this list you can specify words (also called blocking words) that are to be searched for. If one of these words is found preceding a phone number, this number is not displayed as link with preceding country flag button and cannot be dialed directly by mouseclick.

If you want to define a new blocking word, click on the **Add new blocking word** button. The following dialog opens for you to make entries.

If you want to delete a list entry, select it in the corresponding combo box of the configuration dialog and click on the **Remove selected blocking word** button.

> ***NOTICE:*** After you have added or removed blocking words you need to reboot the web browser or update the loaded web page. Only then the configuration changes will be considered.

10.5.3.3 Defining Blacklists of URLs

Configuration option defining "blacklists of URLs".

> ***NOTICE:*** This list does not contain any entries after the installation.

This list contains the URLs not to be considered. You add new entries to the list via the **Add a URL to the blacklist** dialog. You reach this dialog via the **Add new URL** button in the configuration dialog.

If you want to delete a list entry, select it in the corresponding combo box of the configuration dialog and click on the **Remove selected URL** button.

> ***NOTICE:*** After you have added or removed blocking words or URLs you need to reboot the web browser or update the loaded website. Only then the configuration changes will be considered.

10.5.3.4 Defining Blacklists of Phone Numbers

Configuration option defining "blacklists of phone numbers".

> ***NOTICE:*** This list does not contain any entries after the installation.

This list contains the phone numbers not to be considered. You can use the following options to integrate new entries in the list:

- Via the **Add new number** button.
  A click on the **Add new number** button opens the below dialog in which you can enter the desired phone number.

- Via the OpenScape Click-to-Dial-Browser-Plug-in context menu
  Rightclick a phone number on the loaded web page. Select the **Ignore number** option in the context menu. A message confirms the copying of the desired phone number to the **phone number blacklist**. Click on **OK** to close this message.
  If you want to delete a list entry, select it in the corresponding combo box of the configuration dialog and click on the **Remove selected number** button.

> ***NOTICE:*** Modifications to the number list are automatically copied by the program. The web browser need not be rebooted or the displayed website updated.

10.5.3.5 Selecting Countries for Phone Number Normalization

Setting the configuration option "country selection" for phone number normalization.

NOTICE: The defaulted country is always the one configured as location under **Control Panel** > **Regional and Language Options** > **Regional Options**.

Configuring the **default country** determines the country code, which also influences the number normalization. To display the country selection list, enter the initial letter of the country you look for in the entry field. Select the desired country from the list and click on **OK** to copy the modifications.

The following priorities apply for the number normalization:

1. If the country code (for example +49 for Germany) is given for the phone number displayed on the web page, it is used for setting up the call.
2. If no country code is specified, the country code of the given domain is used, for example +49 for the domain `.de`.
3. If 1. and 2. do not apply, the country code of the default country set in the configuration dialog is used.
4. If a phone number has been identified as NANP (North American Numbering Plan) number, +1 is used as country code.

10.6 Operating the OpenScape Click-to-Dial-Browser-Plug-in

Operating OpenScape Click-to-Dial-Browser-Plug-in.

After you have installed the OpenScape Click-to-Dial-Browser-Plug-in, phone numbers on HTML pages are converted in a new HTML structure.

It consists of the following elements:

- A button that represents the flag of the country the country code of which has been identified (country flag button)
- A phone number represented as hyperlink, which can be dialed by mouse-click.

10.6.1 How to Initiate a Call from an HTML Page

Calling a subscriber by clicking a phone number on an HTML page.

How to initiate a call to a phone number represented in the browser:

Step by Step

1. Click on the phone number represented as button with country flag and link in the website.

   NOTICE: If a browser security prompt opens when you click on the phone number because a certificate is missing, you can ignore it and continue with confirming this message.

2. If you use the OpenScape Click-to-Dial-Browser-Plug-in via theOpenScape Web Client: A login dialog opens if you invoke the function for the first time or have not yet saved the user data.

   NOTICE: If you use the OpenScape Click-to-Dial-Browser-Plug-in via OpenScape Desktop Client Enterprise Web Embedded Edition, you need not log in. The call is initiated directly.

3. Enter the name with which you log in at the OpenScape Web Client under **User name**.
4. Enter the password with which you log in at the OpenScape Web Client under **Password**.

The call is initiated.

NOTICE: If you have configured the correct URL for the OpenScape Web Client when installing the plug-in, the connection is set up with the OpenScape Web Client. If the OpenScape Desktop Client Enterprise Web Embedded Edition is installed and running on your system, the call is initiated with it.

10.6.2 The OpenScape Click-to-Dial-Browser-Plug-in Context Menu

Using the OpenScape Click-to-Dial-Browser-Plug-in context menu.

You open the OpenScape Click-to-Dial-Browser-Plug-in context menu with a click of the right mousebutton on the country flag button.

The context menu contains the following options:

- **Copy phone number**
  This feature copies the linked phone number to the clipboard.
- **Call *<phone number>***
  This feature initiates the connection setup with the linked phone number.
- **Ignore number**
  This feature adds the linked phone number to the black list of phone numbers.

NOTICE: The context menu of the OpenScape Click-to-Dial-Browser-Plug-in for Internet Explorer contains the default features of the web browser: **Undo**, **Cut**, **Copy**, **Paste**, **Delete**, **Select all** in addition to the above functions.

10.6.3 The Country Selection Dialog for the OpenScape Click-to-Dial-Browser-Plug-in

Setting of the default country for phone number normalization.

You can change the setting for selecting a country. To open the setting dialog, click on the country flag button that precedes the phone number represented as link on the displayed web page.

The following dialog opens:

To configure another country, click in the entry field and enter the first letter of the desired country. A list of all countries the names of which begin with the entered letter is displayed. Select the desired country and click on **OK**. The country flag icon is updated according to your modification.

10.6.4 Calling via the Web Browser Search Engine List

Calling via the web browser search engine list

> ***NOTICE:*** Microsoft Internet Explorer 7.0 does not support this functionality. In case of Microsoft Internet Explorer 8.0 and Mozilla Firefox the call entry is also automatically added to the context menu of a selected phone number as option - Search with **WebClient Call** ***<phone number>***.

By the call entry **WebClient Call** in the web browser search engine the OpenScape Click-to-Dial-Browser-Plug-in enables using your web browser as normal telephone. In other words, you can call any phone number from your web browser anytime.

Microsoft Internet Explorer 8.0	Mozilla Firefox

Representation of the call entry (example)

You only need to enter the number to be called in the **WebClient Call** field and push the **return key** (**enter**). The desired connection is set up via the OpenScape Web Client.

> ***NOTICE:*** Using this functionality requires you to configure the correct URL of the OpenScape Web Client host during the OpenScape Click-to-Dial-Browser-Plug-in setup. This option is otherwise not installed or displayed in the web browser's search engine.

11 The OpenStage Client

The OpenStage Client is a server application that can be used on telephones of type OpenStage 60/80 for setting frequently required communications functions of the OpenScape UC Application.

Some important OpenScape UC Application functions, normally used via the OpenScape Web Client, the OpenScape Desktop Client Enterprise Web Embedded Edition or the OpenScape Mobile Client, can be operated by telephones of type OpenStage 60 or OpenStage 80 via the application OpenStage Client.

NOTICE: You find detailed operating instructions for the OpenStage telephone in the manuals *OpenStage 60* or *OpenStage 80*.

The following OpenScape UC Application features are available via the OpenStage Client:

- Access to the presence function
  - The telephone displays your currently set presence status.
  - You can change your presence status via telephone.
- Access to your preferred device
  - The telephone displays your currently set device.
  - You can change your preferred device via telephone.
- Access to contact search in the available address books
  - You can look for contacts in the available address books.
  - You can directly call the found contact.
- Access to your contact list
  - You can search your contact list for contacts.
  - You can directly call contacts from your contact list.
- Access to your call journal
  - You can have your call journal displayed. The call journal lists all inbound and outbound calls.
  - You can directly call the subscribers (callers and callees) listed in the call journal.
  - You can filter the display of call journal entries by date and time.
- Access to conferences
  - You can have your conference list displayed.
  - You can start conferences you have created yourself.

11.1 Requirements for Using the OpenStage Client

Requirements for using the OpenStage Client.

The following requirements must be complied with for using the OpenStage Client application in the OpenScape UC Application:

- The person who deploys the application must be an OpenScape UC Application user.
- The user must have been assigned an ONS number (ONS = One-Number Service).
- The server application must have been installed on the backend computer of the OpenScape UC Application.
- The server application must have been configured on the backend computer of the OpenScape UC Application.

On the display of your OpenStage telephone after invoking the **Applications** tab you can see whether the application is available to you. This tab features an entry such as **OpenStage Client** via which you can start or stop the application.

NOTICE: The name **OpenStage Client** is freely selectable and has been assigned here to the application as example. In case of doubt please contact your system administrator.

You reach this tab by touching the sensor key .

NOTICE: Depending on the operating state you need to touch this key several times for browsing the tab view.

11.2 How to Start the Application on the OpenStage Telephone

Starting the OpenStage Client application on the OpenStage telephone.

To start the application on the telephone proceed as follows:

Step by Step

1. Switch to the **Applications** tab using the sensor key of the mode keys.
2. Use the cursor keys "scroll downward/scroll upward" on the TouchGuide to select the **OpenStage Client** application.
3. Use the arrow pointing to the right on the TouchGuide to reach the next function level. Here you find the functions **Start** (for starting the application), **Stop** (for stopping the application) and **Stop All** (for stopping all running applications).

4. Use the cursor keys "scroll downward/scroll upward" on the TouchGuide to select the **Start** function.

5. Execute this action by pushing **OK** in the center of the TouchGuide.

The **OpenStage Client** tab is additionally included in the tab

> ***NOTICE:*** that displays the message "*Starting XML Application*" during the startup procedure.

After completion of the startup process, the OpenStage Client functions are offered on this tab.

11.3 Operating the OpenStage Client

General notes for operating the OpenStage Client.

Operating the OpenScape UC Application features via a telephone of type OpenStage 60 or OpenStage 80 is very similar to operating these functions via the OpenScape Mobile Client. Operation starts after you have booted and invoked the OpenStage Client application via the TouchGuide keys on the OpenStage telephone.

To invoke the application, select the sensor key **Service/application menu** from the mode keys.

Push this sensor key repeatedly until the main menu appears on the **OpenStage Client** tab. You reach the OpenStage Client functions via the main menu.

Use the cursor keys "scroll downward/scroll upward" on the TouchGuide to select the function you wish to edit.

The following further options are available for this purpose:

- Push **OK** in the center of the TouchGuide to directly switch to the submenu of the selected function for performing settings there.

- Use the arrow pointing to the right on the TouchGuide to reach the next function level. The submenu is displayed.

Trigger one of the following functions there:

– **Info**: After you have selected this menu option using the cursor keys "scroll downward/scroll upward" on the TouchGuide and pushed **OK**, you see the software version currently installed.

– **Select**: After you have selected this menu option and pushed **OK**, you branch to the submenu of this function.

– **Exit**: After you have selected this menu option and pushed **OK**, the application OpenStage Client closes after a security prompt.

NOTICE: Depending on the main menu function, the submenu provides additional functions. These additional functions are related to the selected feature and described in the feature's context.

11.3.1 How to Set the Presence Status

Setting the presence status in the OpenStage Client.

You can see your currently set presence status as icon to the left of the menu entry **Presence** and to the right of this entry in the clear text (in the example figure **Available**) in the OpenStage Client.

How to change your presence status:

Step by Step

1. Switch to the **OpenStage Client** tab using the sensor key of the mode keys.
2. Use the cursor keys "scroll downward/scroll upward" on the TouchGuide to select the **Presence** function.

3. Open the menu for selecting a status by pushing **OK** in the center of the TouchGuide.

4. Use the cursor keys "scroll downward/scroll upward" on the TouchGuide to select the desired presence status.

5. Confirm your selection with **OK** in the center of the TouchGuide.

The desired presence status is changed whereever it is displayed in the OpenScape UC Application and you return to the OpenStage Client menu.

11.3.2 How to Set the Preferred Device

Setting the preferred device in the OpenStage Client.

The preferred device is the one you have defined for receiving inbound calls. You select it from your device list. Your currently set preferred device is indicated to the right of the menu entry **Preferred Device** in the clear text (example: **Office Phone**) in the OpenStage Client.

How to change your preferred device:

Step by Step

1. Switch to the **OpenStage Client** tab using the sensor key of the mode keys.
2. Use the cursor keys "scroll downward/scroll upward" on the TouchGuide to select the **Preferred Device** function.

3. Open the menu for selecting a device by pushing **OK** in the center of the TouchGuide.

4. Use the cursor keys "scroll downward/scroll upward" on the TouchGuide to select the desired device.

5. Confirm your selection with **OK** in the center of the TouchGuide.

The desired preferred device is changed whereever the OpenScape UC Application accesses it for routing calls to this device. Subsequently, you return to the OpenStage Client menu.

11.3.3 How to Use the Directory Search

Searching address books for contacts via the **Directory Search** function and calling the found contact.

You can search the available address books for contacts and call a found contact directly.

How to search address books for a contact and call him/her:

Step by Step

1. Switch to the **OpenStage Client** tab using the sensor key of the mode keys.
2. Use the cursor keys "scroll downward/scroll upward" on the TouchGuide to select the **Directory Search** function.

3. Open the selection of search parameters by pushing **OK** in the center of the TouchGuide.

4. Use the cursor keys "scroll downward/scroll upward" on the TouchGuide to select the desired search parameter. The following search parameters are available:
   a) **Name**, to look for the contact via the *second name* database field.
   b) **First Name**, to look for the contact via the *first name* database field.
   c) **Phone**, to look for the contact via the *phone number* database field.
5. After you have selected the desired search parameter push **OK** in the center of the TouchGuide. Next to the search parameter you see an input field.
6. Enter the search item (*second name*, *first name* or *phone number*) using the telephone keypad.

   NOTICE: How to use the telephone keypad for entering a name is described in the manual for the OpenStage telephone under Keypad in section Text input.

   NOTICE: When searching via a name, you can also use the name's initials. This may produce a confusingly long hitlist, though, if too few letters are entered or a letter combination occurs too often. When looking for a contact via phone number, you need to enter this number like you normally do for calling an internal subscriber.

7. Use the cursor keys "scroll downward/scroll upward" on the TouchGuide to select the **Search now** function.
8. Push **OK** in the center of the TouchGuide. The search function starts.

   The search result is displayed indicating the number of hits in the form of a list.
9. Use the cursor keys "scroll downward/scroll upward" on the TouchGuide to select the contact you wish to call.
10. After you have selected the desired contact push **OK** in the center of the TouchGuide. The contact's device list opens.
11. Use the cursor keys "scroll downward/scroll upward" on the TouchGuide to select the device you wish to use for calling the contact.
12. After you have selected the desired device push **OK** in the center of the TouchGuide.

The call to the found contact's device is initiated.

11.3.4 How to Call a Subscriber via Contact List

Calling a subscriber via your private OpenScape UC Application contact list.

Your telephone displays the contact list you have created in the OpenScape UC Application via the OpenScape Desktop Client Enterprise Web Embedded Edition or the OpenScape Web Client. All entries in your contact list including those sorted in sub-groups are itemized. By selecting a contact entry you can directly call this contact.

NOTICE: You can search your contatct list for contacts via the submenu option **Search** (**Contact List** > *contact name* > **Search**).

How to call a subscriber via your contact list:

Step by Step

1. Switch to the **OpenStage Client** tab using the sensor key of the mode keys.
2. Use the cursor keys "scroll downward/scroll upward" on the TouchGuide to select the **Contact List** function.

3. Open your contact list by pushing **OK** in the center of the TouchGuide.

4. Use the cursor keys "scroll downward/scroll upward" on the TouchGuide to select the desired contact.

5. Confirm your selection with **OK** in the center of the TouchGuide. The list of devices available for calling the contact is displayed.

6. Use the cursor keys "scroll downward/scroll upward" on the TouchGuide to select the desired phone number.

7. Confirm your selection with **OK** in the center of the TouchGuide.

> ***NOTICE:*** If you push on the arrow pointing to the right instead of **OK** in operating step 5, the submenu opens. Here you can branch to the device selection via **Details** and search your contact list for a contact via **Search**. The procedure corresponds to the directory search.

The corresponding page of the contact list with the highlighted first hit is displayed as search result.

The call to the selected phone number is initiated.

11.3.5 The OpenStage Client Call Journal

Using the journal for your calls via the OpenStage Client.

The call journal lets you access all calls you have received or made. The journal displays calls with the following attributes:

- A status icon with the following meanings:
  - Inbound call successful
  - Inbound call unsuccessful
  - Outbound call successful
  - Outbound call unsuccessful
  - Conference call from the system
  - Dial-in call to join a conference
- The call time:
  - With indicating the specific time, if the call occurred on the current day.
  - With indicating the specific date, if the call occurred before the current day.
- The name of the called or calling subscriber, if possible.

The journal entries are accompanied with the following editing options:

- Callback to the calling/called subscriber.
- Filtering the journal entries by:
  - Listing all calls.
  - Listing missed calls.
  - Listing inbound calls.
  - Listing outbound calls.

11.3.5.1 How to Call Subscribers via Call Journal

Calling a subscriber via the OpenStage Client call journal.

The call journal lets you access all calls you have received or made. You can select an entry in the call journal and directly call the corresponding subscriber.

How to call a subscriber via your journal entries:

Step by Step

1. Switch to the **OpenStage Client** tab using the sensor key of the mode keys.
2. Use the cursor keys "scroll downward/scroll upward" on the TouchGuide to select the **Journal** function.

3. Open the list of your calls by pushing **OK** in the center of the TouchGuide.

4. Use the cursor keys "scroll downward/scroll upward" on the TouchGuide to select the desired call.

5. Use the arrow pointing to the right on the TouchGuide to reach the next function level. The submenu is displayed.

6. Use the cursor keys "scroll downward/scroll upward" on the TouchGuide to select the **Call** function.

The call to the relevant subscriber is initiated.

11.3.5.2 How to Search the Call Journal for Calls

Filtering the journal entries by date and time.

To detail your search for calls, you can filter the journal entries to display calls that occured in specific periods or on specific dates. When you filter based on a date, you can additionally enter a time from which calls shall be listed.

How to display journal entries from specific periods:

Step by Step

1. Switch to the **OpenStage Client** tab using the sensor key of the mode keys.
2. Use the cursor keys "scroll downward/scroll upward" on the TouchGuide to select the **Journal** function.

3. Open the list of your calls by pushing **OK** in the center of the TouchGuide.

4. Use the arrow pointing to the right on the TouchGuide to reach the next function level. The submenu is displayed.

5. Use the cursor keys "scroll downward/scroll upward" on the TouchGuide to select one of the offered filter functions.

   a) **All calls**: Selecting this option displays all calls in the call journal.

   b) **Missed calls**: Selecting this option displays in the call journal all calls you did not accept.

   c) **Incoming calls**: Selecting this option displays all inbound calls in the call journal.

   d) **Outgoing calls**: Selecting this option displays all outbound in the call journal.

The call journal will then display the calls according to the filter settings.

11.3.6 Operating Conferences via the OpenStage Client

General information about operating conferences via the OpenStage Client.

Using the OpenStage Client you can start conferences you have configured via the OpenScape Desktop Client Enterprise Web Embedded Edition or the OpenScape Web Client and operate started conferences:

- You can select a conference from the pre-configured ones and start it via the OpenStage Client. The started conference is then additionally displayed as active conference in the display under the **Conferences** menu option.

  NOTICE: Depending on the configuration guidelines of creating a conference, you are automatically called at the conference start or need to dial in after the conference start.

- When in an active conference, you have the following options:
  - You can leave the conference.
  - In case of an open conference, every participant can end the conference.

    NOTICE: In case of a moderated conference, only the moderator can end the conference. This is the participant who configured the conference as moderated conference.

  - You can update the list of conference participants displayed on the OpenStage telephone.

11.3.6.1 How to Start Conferences via the OpenStage Client

Starting a conference via the OpenStage Client.

The **Conferences** menu gives you access to all conferences you have configured. You can thus start one of your conferences via this menu.

How to start one of your conferences:

Step by Step

1. Switch to the **OpenStage Client** tab using the sensor key of the mode keys.
2. Use the cursor keys "scroll downward/scroll upward" on the TouchGuide to select the **Conferences** function.

3. Open your conference list by pushing **OK** in the center of the TouchGuide.

4. Use the cursor keys "scroll downward/scroll upward" on the TouchGuide to select the conference you wish to start.

5. Start the conference by pushing **OK** in the center of the TouchGuide.

The selected conference starts and is displayed as active conference in the menu.

- The participants for whom dialing in has been configured upon the conference creation can do so now by specifying the corresponding dial-in and login parameters (bridge number and PIN).
- The participants for whom receiving a system call has been configured upon the conference creation receive the conference call from the OpenScape UC Application and need not log in to the conference.

NOTICE: When dialing in or after you have received the conference call, the system prompts you to make an entry via telephone keypad. This is the case, for example, if you wish to join a conference (entry [**1**]) or if you wish to perform control actions during the conference (entry [*] and [*] once more for activating the conference operation menu). You make these entries via the telephone keypad. Switch to the telephone mode beforehand. You do this by enabling the sensor key **Show telephony interface** of the mode keys.

11.3.6.2 Operating Options in an Active Conference

Operating options via the OpenStage Client in an active conference.

Once the conference has been started and the participants have joined either by dialing in or accepting a system call, the OpenStage Client displays the conference status with the active conference participants:

You can perform the following operating steps in the active conference:

Step by Step

1. Use the arrow pointing to the right on the TouchGuide to reach the next function level.

   The submenu is displayed.

   NOTICE: In the example figure below you see the submenu for the participants of an open conference or for the moderator of a moderated conference.

2. Use the cursor keys "scroll downward/scroll upward" on the TouchGuide to select the desired option.

   - **Leave**: Leaving the conference.
   - **Drop participant**: Removing the selected participant from the conference.
   - **Terminate**: Ending the conference.

   NOTICE: The **Terminate** function is available to all conference participants only in open conferences. In case of a moderated conference, only the person who has created the conference can end it in this way.

- **Lock conference**: Once the conference is locked, no further participants can dial in.

  NOTICE: This function then changes to **Unlock conference**. This allows you to open the conference to other participants again.

- **Mute conference**: This function mutes the microphones of all conference participants. Only the voice signal of the conference participant who triggers this function is still transmitted to all conference participants.

  NOTICE: This function then changes to **Unmute conference**. This allows you to open the microphones for the conference participants again.

- **(Un)Mute participant**: This function lets you temporarily switch off the sound transmission from the selected conference participant. The conference connection is maintained.

  NOTICE: When you invoke this function once more, the selected conference participant becomes audible again.

- **Refresh**: Updating the list of conference participants and switching to the conference participant list.

- **Back**: Takes you back to the OpenStage Client main menu.

  NOTICE: In case of an open conference, all conference participants have access to the full functional range. In a moderated conference, only the moderator has this privilege.

  Other participants in a moderated conference can only use a restricted options menu with the following functions:

  Leave: Leaving the conference.

  Refresh: Updating the list of conference participants and switching to the conference participant list.

  Back: Takes you back to the OpenStage Client main menu.

12 OpenScape Client Integrations

General Information about OpenScape Client Integrations

After installing OpenScape Client Integrations you can use the Click-to-Dial function independently of setting up the CTI client OpenScape Desktop Client Enterprise Web Embedded Edition. You can thus implement this function in many clients and use it there.

12.1 OpenScape Client Integrations

Features of the OpenScape Client Integrations.

OpenScape Client Integrations allows initiating a phone call via any journal entries from within specific clients (click-to-dial) for which this function has been installed.

The following functions are provided via the OpenScape Client Integrations:

- Callback to originators of any messages.
- Direct call, for example via any contact, calendar and task entries that contain contact information.
- After initiating the call, the call control in the OpenScape Web Client opens automatically if the URL of the OpenScape Web Client is entered in the Client Integration setup and the "Use Click to Communicate" option has been set.
- Direct call via selected phone numbers on internet pages for the browsers *Microsoft Internet Explorer* and *Mozilla Firefox*.

12.2 Supported Clients

List of clients via which the OpenScape Client Integrations features can be used.

You can install the OpenScape Client Integrations features using the OpenScape Client Integrations setup for the following clients:

- *Microsoft Outlook*
- *Lotus Notes*

  NOTICE: You can use the click-to-dial feature in *Lotus Notes* for contact entries only.

- *Sametime Connect*
- *Microsoft Internet Explorer*
- *Mozilla Firefox*

You find the latest information about the supported clients and their versions in the *OpenScape UC Application Planning Guide* manual.

12.3 Installation Requirements

Requirements for setting up OpenScape Client Integrations.

The following requirements must be complied with for installing OpenScape Client Integrations:

- **.Net Framework 3.5** must have been installed on the workstation.
- The installation requires administrative privileges on the workstation on which the installation is to be performed.
- OpenScape Client Integrations is always installed for all users who deploy this workstation.
- Before you start the setup you need to shut down the application for which you wish to install OpenScape Client Integrations. An error message will otherwise inform you during the setup that a specific application is still running and needs to be closed.

Furthermore, please heed the following points:

- Only those OpenScape Client Integrations components are offered for installation in the setup for which a corresponding client application is already available.
- Only those OpenScape Client Integrations components are offered for installation in the setup that have not yet been installed on the workstation.
- If the OpenScape Client Integrations components have already been installed via the OpenScape Desktop Client Enterprise Web Embedded Edition setup, installation of these components via the OpenScape Client Integrations setup is blocked. Setup then ends with a corresponding error message.
- If OpenScape Click-to-Dial-Browser-Plug-in has already been installed via the OpenScape Web Client, you can additionally install the missing components during the OpenScape Client Integrations setup.

You find the required setup files for OpenScape Client Integrations on the installation DVD under path:

`win32\ClientIntegrations.zip`

12.4 Setup Adjustments

Adjustments for setting up OpenScape Client Integrations.

As a rule, adjustments of the setup are not required. In case of a Large Rollout, the required parameters are applied by group policy instead of msi file manipulation. In this process, the values for the Domino server name and for the Web Client URL are set via registry keys. You can set the following parameters via group policy:

- The Domino server name: [Type String]
  `HKEY_LOCAL_MACHINE\Software\Siemens\NotesConfiguration\Servername`
- The Web Client URL: [Type String]
  `HKEY_CLASSES_ROOT\mmo\WebURL`

Some commands allow transferring parameters to the `.msi` setup package directly via the `Config.ini`. You can transfer the following commands via the `Config.ini`:

- `WebClientAddress=`
  Via this command the OpenScape Web Client URL is transferred directly to the msi package.
- `CommandLine=`
  Via this command you can transfer the parameters allowed for executing the Windows Installer. For example, the setup is executed automatically without user entries (silent mode) with `Commandline=\qn`.
- `Activation=0`

  NOTICE: You need to supplement this command manually under the `[WiseInstaller]` heading.

  Supplement this command if the Click-to-Dial browser plug-in shall be disabled after the installation for the time being. You need to activate the plug-in then manually via the configuration dialog of the respective browser application (Microsoft Internet Explorer or Mozilla Firefox).
- `RequestString=`
  Without meaning here.

12.5 How to Install the OpenScape Client Integrations

Setup routine for the OpenScape Client Integrations.

NOTICE: The language in the setup dialogs is exclusively English.

How to install the OpenScape Client Integrations for the previously mentioned clients:

Step by Step

1) Start the setup file `InstallClientIntegrations.exe`. The following dialog opens:

2) Click on **Next >** to start the installation. The following dialog opens:

3) Enter your name in the field **Full Name** and the company name in the **Organization** field. Then click on **Next >**. The following dialog opens:

4) Select the client application for which OpenScape Client Integrations is not to be installed. OpenScape Client Integrations is selected for installation for all available client applications by default.

- To exclude a component from the setup, click in the list field on the arrow icon and select the **Entire feature will be unavailable** option in the context menu.
- You can use the **Reset** button to cancel a setting and switch back to the default setting.
- You can display the drive environment of this system via the **Disk Cost** button for detecting free memory.

The following components can be installed:

- *Microsoft Outlook*
- *Lotus Notes*
- *Sametime Connect*
- *Sametime Connect for Notes 8*
- *Microsoft Internet Explorer*
- *Mozilla Firefox*

Setup always occurs to the directory `...\Programs\Siemens` by default.

5) After you have specified your setup defaults, click on **Next >**. The following configuration dialog opens:

6) Enter the URL for your web client in the input field under **OpenScape Web Client host address**. The call is initiated via the OpenScape Web Client. You can use the IP address (example: http://100.100.100.100:7789) or the server name (example: https://webclient.company.com) to enter the host address.

7) Click on the **Check server address** button. If the specified server address is valid, the following success message is put out:

If the specified server address is invalid, the following error message is put out:

8) Set the Use **Click To Communicate** option if you want the call control of the OpenScape Web Client to open automatically when you initiate a call via the Click-to-Dial function.

9) Enter the path to the directory server for the connection to a Lotus Notes server in the next input field. Make this entry in the format <domain/server> (example: **Sametime/Data**). This enables direct dialing from the standard Notes directory without any previous configuration.

10) Click on **Next >** to start the setup process. The next dialog shows the setup progress.

You can terminate the setup process via the **Cancel** button.

11) When the installation is accomplished the following dialog appears:

12) Click on **Finish** to complete the setup process.

OpenScape Client Integrations is now installed for the selected client applications.

12.6 OpenScape Client Integrations

Operating the OpenScape Client Integrations.

Prerequisites

- The OpenScape Client Integrations must have been installed for the client from which you wish to use the features.
- The journal and contact entries you wish to use for a return call must have been stored with a phone number.

To call any journal entry from your mail client via the OpenScape Client Integrations proceed as follows:

Step by Step

1) Select the entry you wish to call in your mailbox, calendar or address book.

2) Click on **Dial**.

3) Enter your user data for authentication if you have not done this already.

NOTICE: Authentication is only required when you use the call function for the first time or after you have changed the password. Thereafter, the call is initiated without previous authentication.

The call is initiated via the OpenScape Web Client.

NOTICE: If you have selected the Click-to-Communicate option during the installation, the call control for visualizing and controlling the call opens directly.

12.7 Updating and Uninstalling via the Setup File

Performing a modification, repairing or uninstalling the application.

After the installation you can invoke the setup routine once more for performing maintenance tasks:

- Changing the setup settings that were performed during the initial installation.
- Repairing the application if program errors occur or a new program version is to be installed.
- Uninstalling the application.

After you have started the setup routine anew, a dialog opens for selecting and performing the desired action.

The following actions are available:

- **Modify**: Select this option if you wish to change application settings you performed during the previous setup.
- **Repair**: Select this option if the application does not work properly because files are damaged or missing. The application will then completely be reinstalled.
- **Remove**: Select this option if you wish to remove the application from your workstation.

12.7.1 How to Change Program Settings

Changing application parameters of OpenScape Client Integrations via the setup.

How to change the settings performed during the OpenScape Client Integrations setup:

Step by Step

1) Start the setup file `InstallClientIntegrations.exe`. The following maintenance dialog opens:

2) Select the maintenance option **Modify**.

3) Click on **Next >** to initiate the selected action.

You are guided through the installation steps you ran through during the initial installation and can adjust your settings.

12.7.2 How to Update or Repair

OpenScape Client Integrations via the setup.

How to install a more recent version of the application or perform a new installation because of errors in the application:

Step by Step

1) Start the setup file `InstallClientIntegrations.exe`. The following maintenance dialog opens:

2) Select the maintenance option **Repair**.

3) Click on **Next >** to initiate the selected action.

The setup routine starts. The application will then completely be reinstalled.

12.7.3 How to Uninstall the Program

OpenScape Client Integrations via the setup.

NOTICE: OpenScape Client Integrations should be uninstalled in the usual manner via **Control Panel** > **Programs and Features**.

How to completely remove the application from your workstation via the setup:

Step by Step

1) Start the setup file `InstallClientIntegrations.exe`. The following maintenance dialog opens:

2) Select the maintenance option **Remove**.

3) Click on **Next >** to initiate the selected action.

The uninstallation routine starts and the application is completely removed from your system.

13 OpenScape UC Application Icons

Overview of the icons used in the OpenScape UC Application client programs.

The icons used are grouped in the following categories:

- Status icons
- Action icons divided in:
  - Communication icons
  - Cooperation icons
  - Application feature icons
- Information icons

13.1 Status Icons

Status icons in the OpenScape UC Application clients.

The following icons are used for status displays in the clients:

Icon	Function	Icon	Function
	Available		Information on Available
	Be right back		Information on Be right back
	In a meeting		Information on In a meeting
	Busy		Information on Busy
	Do not disturb		Information on Do not disturb
	Unavailable		Information on Unavailable
	Unknown		Information on Unknown
	Status cannot be displayed or status information display switched off		

13.2 Action Icons

Action icons in the OpenScape UC Application clients.

Using OpenScape UC Application action icons you can communicate with others, cooperate with others and use application features.

Action icons are grouped in the following categories:

- Communication icons
- Cooperation icons
- Application feature icons

13.2.1 Communication Icons

Communication icons in the OpenScape UC Application clients.

The following icons are used for communicating with other subscribers:

Icon	Function	Icon	Function	Icon	Function
	Call (subscriber free)		Call (inactive)		Call (subscriber busy)
	Call (subscriber without telephone status display)		End call (cancel call)		Phone unknown
	Call (several phone numbers available, available subscriber)		Call (several phone numbers available, deactivated)		Call (several phone numbers available, busy)
	Call (several phone numbers available)				
	Call (pull-down menu)		Hold call		Resume held call
	Consultation		Transfer call		
	Forward call		Transfer call to another device		Transfer call
	Redirected call - deputy		Take incoming call		Take outgoing call
	Request callback with busy line or no reply				
	Instant messaging - contact is online		Instant messaging - contact is offline		Instant messaging - unknown contact status
	Initiate chat conference or invite further persons for the chat				

Icon	Function	Icon	Function	Icon	Function
	Routing profile (active)		Routing profile (inactive)		
	Office phone		Mobile phone		Miscellaneous phone
	Phone number list				
	Record call		Finish recording		Call is recorded
	Send e-mail via default e-mail application		Send e-mail to all		Private e-mail
	Contact list		Contact list main bar		Add contact

13.2.2 Cooperation Icons

Cooperation icons in the OpenScape UC Application clients.

The following icons are used for cooperating with other subscribers:

Icon	Function	Icon	Function	Icon	Function
	Create conference		Initiate ad-hoc conference (active)		Initiate ad-hoc conference (inactive)
	Option "Participate in conference" or "Display conference" (activated)		Option "Participate in conference" or "Display conference" (deactivated)		Conference is started
	All participants need to dial in themselves		All participants are called		Conference moderator
	Participant dials in himself/herself		Participant is called		End conference
	Conference/ conference member not muted		Conference/ conference member muted		
	Conference is locked (can be unlocked)		Conference is unlocked (can be locked)		

Icon	Function	Icon	Function	Icon	Function
	Add new work group		Work group (active)		Work group (inactive)
	Active work group				
	Web conference				

13.2.3 Application Icons

Application icons in the OpenScape UC Application clients.

The following icons are used for application control in the clients:

Icon	Function	Icon	Function	Icon	Function
	Minimize feature window to caption bar		Expand feature window from caption bar		Open pulldown list
	Browse to journal list start		Go down in journal		Go up in journal
	Go to end of journal		Context menu		
	Copy		Edit		Note
	Remove		Journal notes		
	Help		Search		Delete search mask
	OpenScape address directory		General address directory		Outlook application
	Minimize window		Expand window		View in separate window
	Split window section horizon-tally		Split window section vertically		

13.3 Information Icons

Information icons in the OpenScape UC Application clients.

The following icons are used for informing about specific operating states in the clients, for example in journals:

Icon	Function	Icon	Function	Icon	Function
	Incoming connected		Outgoing connected		
	Incoming busy		Outgoing busy		
	Incoming not reached		Outgoing not reached		
	Phone unavailable		Phone unknown		
	Call		Urgent call		
	Access		Call		
	Active conference				
	Voicemail		Audio settings		Mute
	Call is recorded				
	Subscriber available		Subscriber unavailable		Unknown contact
	Office phone		Mobile phone		Miscellaneous phone
	My computer				

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